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Phosphate trade and EU-Morocco relations

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I declare on my honour that this dissertation is my own work, completed without unauthorised external assistance, that it has been submitted to no other institution for assessment, and that it has never been published, either in whole or in part. All the information (ideas, sentences, graphs, maps, tables, etc.) taken from or referring to primary or secondary sources are properly referenced using the current university method. I declare that I have taken note of and adhere to the Code of Ethics for students with regard to borrowing, quoting from and using various sources, and am aware that plagiarism is a serious offence.

Abstract

This Master's Mémoire examines the subject of phosphate trade and its impact on EU-Morocco relations. The European Union categorizes phosphate rock as a critical raw material owing to its essential role in key strategic sectors of the economy such as the agricultural and food production industries, as well as due to the absence of any viable substitutes.

Domestic production of this mineral compound is scarce in Europe. Consequently, the European Union relies heavily on imports in order to meet its phosphate demand, with Morocco serving as the European Union's main phosphate supplier owing to its vast phosphate reserves and prominent position in the global phosphate market.

However, a substantial share of Morocco's phosphate reserves is located in the disputed territories of Western Sahara. In this regard, although this is not the case at the time of writing of this dissertation, several shipments of Western Saharan phosphate have entered European markets over the past decade. Furthermore, a number of EU-based companies and firms are involved in the phosphate sector in the Western Sahara, either through trade or offering logistical and legal support to Moroccan authorities. These later statements should be analyzed in light of the legal, political and ethical concerns surrounding the exploitation of natural resources in non-self-governing territories pending decolonization, resource governance and, in particular, the rights of the Sahrawi people.

Thus, this Master's Mémoires examines the numerous interests at play in the field of EU-Morocco phosphate trade, highlighting the tensions between the supply security of strategic resources and adherence to international law and human rights norms.

Master Mémoire: Phosphate trade and EU - Morocco relations

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Introduction. Synopsis & Methodology.

The ties between the EU and Morocco run deep. In this context, more often than not, the coverage of EU- Morocco relations is mostly focused on matters of trade. This usually contemplates the study of the evolution of EU - Morocco trade by analyzing the impact of treaties such as the EU-Morocco Euro-Mediterranean Association Agreement - concluded in 1996 and entering into force in the year 2000 (Yousef, A., 2017; Dadush, U., & Myachenkova, Y., 2018; Barnes, R., Harrison et al, 2020; Hoekman, B., 2016) and the subsequent treaties, partnerships and initiatives that followed.

Another crucial aspect of this relationship is the EU and Morocco's cooperation on security and migration control (Morabety, A. E., 2017; Dworkin, A., & Malki, F. - Z. E., 2018). In recent years, however, this partnership has become something of a double-edged sword. On one hand, Morocco has played a pivotal role in securing the EU's southern border and fostering regional stability. On the other hand, it has granted Morocco significant leverage over the EU. This dynamic is particularly evident during diplomatic tensions between the EU and Morocco, such as those concerning the status of the occupied Western Sahara (Agence Europe b, 2021). In such instances, Morocco has made use of migration to destabilize the EU's southern border, exerting political pressure on the bloc and its Member States to over decisions, policies or official actions deemed to contravene Moroccan interests in the region (Torreblanca, J. I., 2021). In other words, anything that challenges or undermines Morocco's claims of ownership over the Western Sahara.

This security and migration partnership also sheds light on the EU's promotion of democratization, human rights, and adherence to international law in its dealings with Morocco - objectives that are otherwise central to the EU's external actions as per article 21 of the Treaty of the European Union. However, the EU should not be considered as an unitary actor in this context. There is no "single" EU democracy (human rights/international law promotion model: each institution conceives and pursues said objectives differently from one another, which usually leads to ambiguity, policy divergence and, in some cases, conflict (Mouhib, L., 2014; Wetzels, A. & J. Orbie, 2011).

Meanwhile, scant attention is paid to matters such as EU- Morocco phosphate trade. Now, one might think: what is the relevance of phosphate trade in this context? To provide some context, phosphate rock is a mineral used to produce phosphorus, which, in turn, is essential for making fertilizers, animal feed supplements, and food additives (Zapata, F. & Roy, R. N., 2004; Mew, M. C., 2016; Geissler, B., Steiner, G., Haneklaus, N. & Mew, M., 2023; Tulsidas et al., 2019). It also has applications in uranium production at small scale levels, with potential for further development (Tulsidas et al., 2019).

Furthermore, phosphate is a critical resource for the EU. However, the EU produces very little of this mineral compound domestically, relying on imports to meet 82% of its phosphate needs (Kasprak, A., 2016; Grohol, M. & Veeh, C., 2023). Morocco, which holds 70% of the world's phosphate reserves - spanning both its mainland and the occupied territories of Western Sahara - is the EU's largest supplier, accounting for 27% of the latter's phosphate imports as of 2022 (de Ridder et al., 2022; Grohol, M. & Veeh, C., 2023; CRU, 2023; WSRW, 2023; Ali, A. & Dadush, U., 2023). This figure is expected to rise to 50% in the coming years, underscoring Morocco's growing importance in the EU's phosphate supply chain.

Despite its significance, the literature on the field tends to overlook this issue, with a few notable exceptions (Allan, J., 2016; Camprubí, L., 2015). Even then, these works often gloss over the topic and fail to explore the intricacies of EU - Morocco phosphate trade, its links to the EU's economy, and its implications for the EU's capacity to formulate effective external action and foreign policy in regards to Morocco. I would argue that, by shedding some light onto this topic, we can gain a more nuanced understanding of the different factors shaping EU - Morocco relations, identifying the relation between resource dependency and the framing of foreign policy/external action.

As such, my Master Mémoire revolves around the following research question

What is the impact of phosphate trade on the bilateral relations between the European Union (EU) and Morocco, and how does it affect the EU's efforts to promote human rights, democracy, and adherence to international law in the region?

My main research question will be complemented by the following sub - questions:

- *What is the nature of phosphate trade and the uses of phosphate in the EU economy?*
- *What are the links between the EU - Morocco phosphate trade and the conflict in the Western Sahara?*
- *What is the impact of phosphate trade in the context of EU Morocco relations?*

Throughout my research, I will contextualize my findings within the broader framework of my thesis, thereby evaluating the current state of research in the field of EU - Morocco relations. This approach will enable me, as well as other potential readers, to understand the diverse scholarly perspectives, methodologies, and insights in the field of EU - Morocco relations - as well as phosphate trade in particular -, while also identifying any gaps present in the literature in the field.

Literature Review. The cornerstone of my Master's Mémoire is a thorough literature review that draws on academic research, policy analyses, and reports from intergovernmental and non-governmental organizations. This review covers a wide array of sources, including academic journals focused on EU-Morocco relations, phosphate trade, international law, and European studies, as well as policy documents from the European Union.

Comparative Analysis and Case Studies. To better understand the complexities of EU-Morocco relations and the role of phosphate trade, I will incorporate several case studies examining how economic conflicts shape geopolitics and diplomatic ties. Key examples include the 2000s Rare Earth Dispute, the Indonesian occupation of West Papua, and the ongoing conflict in Western Sahara. These cases will provide valuable comparative insights.

Empirical Data Collection. My research will rely on quantitative data from official EU statistics, trade figures, and reports from international organizations. By analyzing trade statistics, phosphate export/import volumes, and economic indicators, I aim to provide concrete evidence of the scale and trends in EU-Morocco phosphate trade. This data will also shed light on the political dimensions of these trade relations, revealing

patterns such as fluctuations in trade volumes, shifts in EU policies, or changes in Morocco's export strategies.

For that purpose, I shall conduct an extensive search of academic databases, including JSTOR, Google Scholar, and ProQuest, using keywords such as "EU-Morocco relations," "EU phosphate trade," "Moroccan phosphate trade," "phosphate trade and governance," and "Western Sahara conflict and phosphate." The goal of this search is to identify, study, and analyze relevant articles, books, treaties, quantitative data, and trade statistics.

As per its layout, my dissertation will be divided into four distinct chapters.

The first part, titled “**Part 1: EU - Morocco Relations. A review**”, will focus on the broader context of EU-Morocco relations. It will briefly examine the historical evolution of diplomatic and commercial ties between the EU and Morocco, providing the basis for understanding the current state of research on this topic. Additionally, this section will identify gaps in the existing literature, setting the stage for the central theme of my research: the significance of phosphate trade in shaping the EU's external action and its diplomatic relationship with Morocco.

The second part, titled “**Part 2: Phosphate, a Critical Raw Material: EU trade, supply and demand**”, will delve into the nature of phosphate rock - its extraction, trade, and use in the EU market. This section aims to analyze the economic and strategic implications of phosphate trade for the EU, addressing the second and third sub-questions outlined earlier. By exploring how phosphate trade influences the EU's economy and strategic autonomy, this section will highlight its critical role in the broader EU - Morocco relationship.

The dissertation will then proceed into a third part, titled “**Part 3: The Conflict in Western Sahara. A case study for the influence of EU - Morocco trade**”, which will compile studies on the conflict in Western Sahara and its connection to phosphate trade. This issue is a sensitive point in EU - Morocco Relations, with much of the literature and media coverage linking the EU's ambiguous stance on Western Sahara to its migration and security partnership with Morocco (i. e., the weaponization of migration

and stability concerns). This section will serve as a case study to elucidate how phosphate trade impacts EU-Morocco relations, particularly regarding the Western Sahara conflict, thereby addressing the fourth and final sub-question guiding my research.

And finally, this Master's Mémoire shall culminate in a fourth and final section, a conclusion, consisting of an analysis based on the main arguments I shall present throughout this Master's Mémoire and findings derived from my research, providing an answer to the main research question of this dissertation.

Part 1: EU - Morocco relations. A review.

As outlined in the synopsis of this Master's Memoire, this section will consist of a preliminary literature review to assess the scope and depth of scholarly coverage on the field of EU - Morocco relations. Such an exercise will allow me to assess the existence of any possible gaps in the literature on EU - Morocco relations, particularly regarding the main theme of this Master's Memoire: the impact of phosphate trade in EU - Morocco relations, namely with regards to the Western Sahara conflict.

As such, from the study of numerous sources - be them academic, journalistic or more close to the field of economics - , I have identified three main thematic points in the field of EU - Morocco relations. Mainly, “EU - Morocco trade”, “the EU - Morocco security and migration partnership” and “the promotion of the EU’s external action objectives in its diplomatic relations with Morocco”.

Thus, in this chapter, I will present my research on these three thematic points to shed light on the current academic, journalistic, and economic analysis of EU-Morocco relations. But, before delving into further detail, a small introduction about the history of EU - Morocco relations is in order.

1. 1. Historical Evolution of EU - Morocco relations, a brief summary.

Links between the EU and Morocco run deep. We can trace the origin of EU-Morocco relations back to the 1960s. Back then, the EU’s¹ relationship with the Alawi Monarchy was primarily focused on security cooperation, with commercial interests being relegated to a second place (Yousef, A., 2017).

It is important to note that, at the time, the EU’s focus in the MENA region was placed on the eastern Mediterranean, which presented a higher security risk for the bloc. This was particularly true of the Levant, a powder keg for conflict at the time (Gomez, R., 2003). The myriad of conflicts still plaguing this region posed serious security concerns for the EU. Nevertheless, countries like France, and later Spain, began to view the

¹ I opted to use the term EU rather than European Communities - the correct term to use to refer to the EU at the time - for the sake of coherence and clarity within the text.

Maghreb - and, thus, Morocco - as a more pressing concern (Gomez, R., 2003). Conflict and instability in this region could pose a serious threat to the EU, jeopardizing both the security of its southern border and the economic interests of former colonial powers like France and Spain in the region.

Over the years, relations with Morocco began to shift towards more commercial matters, though they remained predominantly bilateral and did not involve the EU as a commercial partner (Yousef, A., 2017). This shift was driven by the interests of Member States such as France and Spain, which sought to strengthen their commercial ties with their former colonies in North Africa.

To adopt a more cohesive approach to its relations with Morocco and other MENA countries, the EU launched the Barcelona Process in 1995 (Yousef, A., 2017; Ruckteschler, C., Malik, A. & Eibl, F., 2019). At this convention, the foreign ministers of the EU (15 at the time), along with their counterparts from countries such as Morocco, Tunisia, and Egypt, launched the Euro-Mediterranean Partnership, with the purpose of establishing political, economic and cultural ties between the EU and its South and East Mediterranean neighbours (Eurlex, n. d.; Ruckteschler, C., Malik, A. & Eibl, F., 2019). This partnership was later complemented by the European Neighbourhood Policy.

It is within this context that the EU and Morocco concluded in 1996 an Association Agreement, which entered into force in the year 2000, with the objective to establish a free trade area by 2010 (European Union, 2000; Yousef, A., 2017). This agreement aimed to guarantee peace and stability in Morocco by means of economic development and trade liberalization. From starters, the Association Agreement saw the triggering of a 12 year tariff liberalization process, which was followed by the establishment of complementary non-tariff measures with the purpose of gradually establishing/transitioning towards a Free Trade Area between the EU and Morocco. Thus, doing away with most industrial duties between the two parties (Ruckteschler, C., Malik, A. & Eibl, F., 2019; Yousef, A., 2017).

1. 2. EU - Morocco Trade.

The literature on the field of EU-Morocco trade relations usually focuses its attention on the previously mentioned Euro-Mediterranean Association Agreement between the EU and Morocco (Yousef, A., 2017; Dadush, U., & Myachenkova, Y., 2018; Barnes, R., Harrison et al, 2020; Hoekman, B., 2016). This treaty usually serves as the starting point of many publications and articles on trade between the EU and Morocco, assessing its evolution and impact over the years.

As mentioned in the previous section, the EU-Morocco Association Agreement, signed in 1996 and entering into force in 2000, established a Free Trade Area that has since facilitated trade flows in goods and services and increased investment flows between the two parties. (European Commission a, n. d.; European Union, 2000; Yousef, A., 2017).

This initiative has been supplemented by several agreements aimed at further liberalizing the Moroccan economy, encompassing trade in agricultural, industrial and fishery products, among others (Dadush, U., & Myachenkova, Y., 2018). A notable example includes the exchange of Letters between the European Union and the Kingdom of Morocco concerning reciprocal liberalization measures for certain categories of agricultural, industrial and fishery products, entering into force in 2012 (European Commission a, n. d.).

This whole process was supposed to lead to the establishment of the EU-Morocco Deep and Comprehensive Free Trade Area (Hoekman, B., 2016). Negotiations on this letter agreement began in 2013 but came to an indefinite halt in 2014 at Morocco's request, due to concerns about its potential socio-economic impact and the competitive pressure it might exert over the Moroccan economy.

Additionally, there is an Agreement for the Protection of Geographical Indications (GIs) (European Commission, 2015), which is still pending ratification. Other memorable mentions are the EU - Morocco Fisheries Partnership Agreement, which entered into force in 2007 (Barnes, R., Harrison et al, 2020). Back in 2016 the EU tried to extend the scope of this agreement to include the non - self - governing, occupied territories of Western Sahara (Ryngaert, C. 2018; Suárez - Collado, Á., & Contini, D., 2021).

However, The Court of Justice of the European Union (from here on out referred to as the CJEU) annulled such a decision.²

As it stands, the EU is Morocco’s biggest trade partner globally. The EU accounted for 56% of Morocco's total trade in goods in 2023 (European Commission, 2024). This translates into roughly 58.3 billion euros. Meanwhile, Morocco is the EU’s 21st biggest partner, accounting for roughly 1.1% of its global trade in 2023 (European Commission, 2024).

During 2023, the EU’s imports from Morocco amounted to €23.4 billion. These imports were as followed:

EU Imports From Morocco (2023)		
Category	Value (€ billion)	Share of Imports
Transport equipment	6.2	26.7%
Machinery & appliances	5.8	25.0%
Textiles	2.7	11.7%
Vegetable products	2.7	11.7%

(European Commission, 2024).

On the other hand, the EU's exports to Morocco amounted to €32.9 billion. Exports were led by:

EU Exports to Morocco (2023)		
Category	Value (€ billion)	Share of Exports
Machinery & appliances	7.9	24.2%
Mineral products	4.6	12.7%

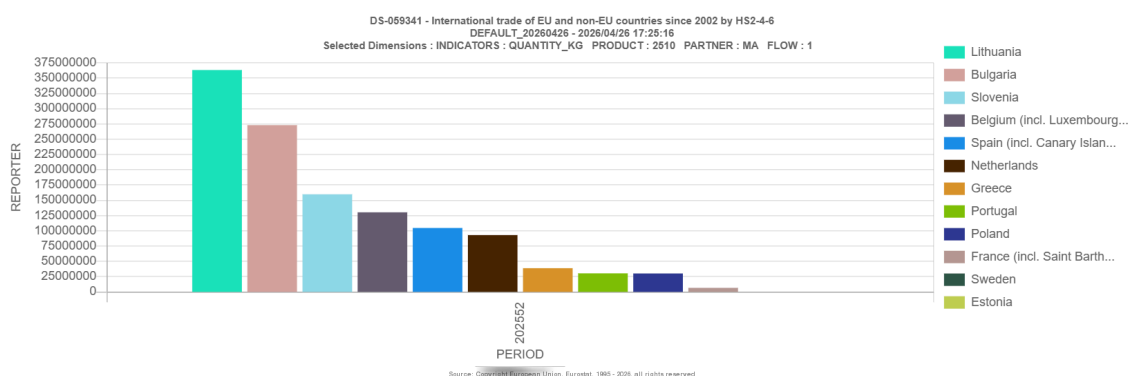
² This topic will be further developed in section 4 of this Masters Mémoire.

Transport equipment	4.1	12
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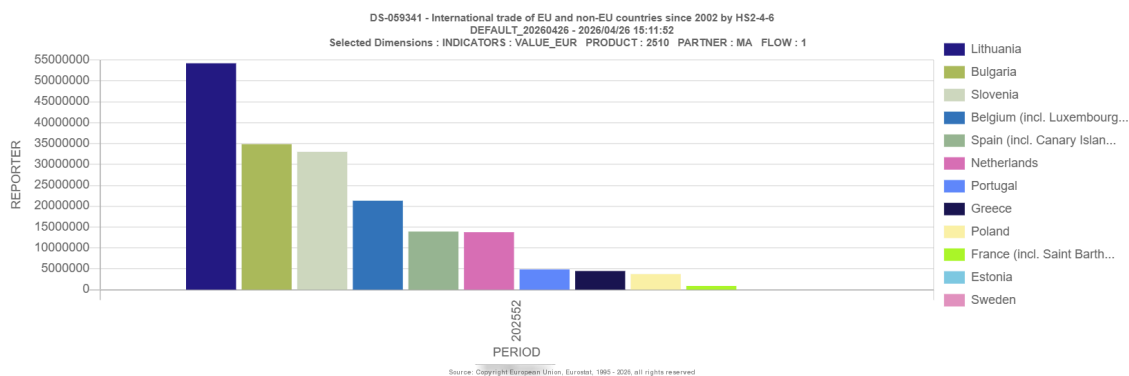
(European Commission, 2024)

As can be seen, trade between the EU and Morocco appears to be quite imbalanced. To reiterate, while the EU is Morocco's largest trade partner globally, Morocco is just the EU 21st largest trade partner - accounting for a measly 1% of the EU's trade flows (European Commission, 2024). Furthermore, as stated in previous paragraphs, trade with the EU accounts for 56% of Morocco's global trade flows (European Commission, 2024). At mere glance, as well as in absolute numbers, it is pretty much clear that the Moroccan economy is heavily reliant on trading with the EU.

While these numbers portray the EU as the dominant economic actor in this relationship, there are several areas where Morocco might hold some leverage over its trade partner to the north. One such area is phosphate trade. Moroccan phosphate exports account for 27% of the EU's phosphate demand (Cordell, D. & White, S. B., 2011; Grohol, M. & Veeh, C., 2023; de Ridder et al., 2022; David, M., Lyth, S.M., Lindner, R. & Harrington, G. F., 2021). On this regard, in 2025, the main destination of Moroccan phosphate imports to the EU is as follows: Lithuania, accounting for 363286 tons valued at €54.2 million; Bulgaria, with 273033 tons worth €34.8 million, Slovenia, with 159800 tons equivalent to €33 million; Belgium, with 130300 tons corresponding to € 21.3 million; Spain, with 104634 tons equal to €13.9 million; and the Netherlands, with 93039 valued at € 13.7 million (Eurostat, n.d.).



Eurostat, n. d.



Eurostat, n. d.

For context, back in 2014, the EU declared phosphate rock a critical raw material, due to its importance as a key component in the chain of production of strategic sectors of its economy (Grohol, M. & Veeh, C., 2023).

In this regard, while the EU remains the overall dominant commercial partner, Morocco's role as the EU's main supplier of phosphate grants the former a certain degree of leverage over its northern neighbor.

- **Effects of EU - Morocco trade.**

The objective of the EU's trade policy towards Morocco, as well as with other Northern African nations, is to create a free trade area encompassing all of the Mediterranean (Langan, M., & Price, S., 2020; Chadwick, 2018). This is meant to, as argued in previous paragraphs, not only guarantee peace and stability in the region but also provide the necessary stimulus to the Northern African economies - such as Morocco, for the sake of this argument -, contributing to poverty reduction and sustainable development within the region.

The EU presents this kind of partnership as a “win - win” situation (Langan, M., & Price, S., 2020; Nicolaidis, K., 2015). On the one hand, the EU gains access to emerging consumer and raw material markets (Langan, M., & Price, S., 2020). This is better seen in the case of the EU's interest in the Moroccan phosphate rock industry, especially as it pertains to the extraction of this mineral compound and its further processing and trade as fertilizer, as well as other derivatives (Grohol, M. & Veeh, C., 2023; Directorate General for Agriculture, n .d; European Commission, 2019; Ulrich, A. E, 2019). In

return, Morocco gains access to one of the biggest export markets in the world, which in turn helps the country to attract foreign direct investment, increase its goods and services exports, among other factors (Langan, M., & Price, S., 2020). This partnership with the EU has also provided Morocco with access to aid and development initiatives, joint partnerships on developing renewable energy sources, etc (Karakosta, C., Mariankis, V. & Psarras, J., 2013; Directorate General for Neighbourhood and Enlargement Negotiations, 2022).

Trade with the EU has significantly contributed to Morocco's economic growth by providing access to one of the largest markets in the world (Berahab, R. & Dadush, U., 2020). It has fostered job creation and productivity particularly in industries like textiles, and automotive manufacturing, while also promoting infrastructure development and technology transfer through foreign investments. For example, a 2018 study estimated that cooperation on renewable energy between the EU and Morocco could boost GDP by 1.17% to 1.9% and create between 67,000 and 482,000 jobs in the renewable energy sector (Escribano, G., 2018; de Arce, R., Mahía, R., Medina, E. & Escribano, G., 2012).

However, some academics present a totally different perspective. Many authors claim that these trade relations are not as benign and simple as they appear. Detractors claim that EU trade policies are not carried out in equal terms. Instead, they argue that these trade policies tend to perpetuate neocolonialist tendencies (Langan, M., & Price, S., 2020; Nicolaidis, K., 2015; Racine, M., 2018), pointing to the massive penetration of Western firms into the Moroccan economy and the pressure to liberalize Morocco's national industries as evidence. This latter example is most evident in the massive tariff liberalization scheme Morocco underwent as a result of the implementation of the Euro-Mediterranean Association Agreement (Ruckteschler, C., Malik, A. & Eibl, F., 2019).

In response, and as a sign of resistance against such measures, Morocco immediately raised vast amounts of Non Tariff Measures (from here on out referred to as NTMs) (Langan, M., & Price, S., 2020). During the first decade of the EU-Morocco Association Agreement, the number of NTMs imposed on EU goods doubled for manufactured products, while other sectors that saw tariff cuts also experienced a rise in

NTMs. (Ruckteschler, C., Malik, A. & Eibl, F., 2019; Langan, M., & Price, S., 2020). These measures also aimed to protect the economic interest of Morocco's industrial and economic elites, closely linked to the country's political strata and the Makhzen (*id est*, the Moroccan royal court).

Overall, trade relations between the EU and Morocco provide a clear example of neo-colonial dynamics, whereby the former metropole leverages economic and political power over its former colony, which facilitates the siphoning of raw material and market capture/ domination by means of foreign direct investment and trade dependence. However, it is important to distinguish between the EU, as a supranational actor, and the likes of Member States such as France or Spain, as former colonial metropolises *strictu sensu*. At EU level, asymmetries in economic power and regulatory capacity enable the Union to shape trade conditions with Morocco. Meanwhile, Member States such as France maintain a certain degree of influence over Morocco rooted in historical, economic and political ties as former metropolises. Taken together, all these factors contribute to applying pressure on Morocco to liberalize its market, make way for EU foreign direct investment, as well as reinforcing the country's dependence on European markets.

That being said, Morocco is not totally devoid of agency in this context. Its role as the EU's main phosphate supplier (Cordell, D. & White, S. B., 2011; Grohol, M. & Veeh, C., 2023; de Ridder et al., 2022; David, M., Lyth, S.M., Lindner, R. & Harrington, G. F., 2021) potentially affords Morocco some degree of leverage when dealing with its neighbour to the north.³

1. 3. EU - Morocco security and migration partnership.

Cooperation between the EU and Morocco also covers other areas, far beyond trade. Through initiatives and agreements such as the EU-Morocco Partnership on Irregular Migration (European Commission, 2023) and the EU - Morocco Action Plan (Council of the European Union, 2004), the EU and Morocco collaborate on border and

³ This topic will be developed in sections 3 and 4 of this Master's Mémoire.

migration, migration, capacity building and resilience, as well as other initiatives (Morabety, A. E., 2017; Dworkin, A., & Malki, F. - Z. E., 2018).

Morocco plays a crucial role within the EU's security framework. Due to its geographical location, sharing a land border with Spain, Morocco has assumed the role of the EU's "gatekeeper" as far as migration is concerned. In this sense, the need to guarantee stability in the region - and, by extension, the need to guarantee the stability of the EU's southernmost border - has contributed to Morocco becoming one of the EU's largest "migration partners" (Gross-Wyrtzen, L. & El Yacoubi, Z. R. 2024). As a result, the EU - either directly or through individual contributions from Member States - helps to fund and provides technical assistance to Morocco on border control (Fakir, I. et al, 2023). Between 2015 and 2022, Morocco received an estimated €234 million and €150 million through various mechanisms such as the EU Trust Fund, the EU Neighbourhood Development, the Asylum, Migration and Integration Fund, and the International Cooperation Instrument, respectively. These investments aimed to strengthen Morocco's border control and surveillance capabilities, tackling smuggling and human trafficking, as well as fostering protection and community stabilization, among other priorities (European Union, 2023). The EU also invested € 631 million in Morocco between 2021 and 2022 under the Neighbourhood, Development and International Cooperation Instrument to strengthen Morocco's migration control systems. This trend, present since the beginning of the EU-Morocco partnership and the Barcelona Process (Geddes, A., 2014), accelerated in the 2010s, coinciding with the "Arab Spring" and the 2015 migration crisis resulting from the war in Syria.

Despite the scale of the EU's investment in Morocco's border control capacities and numerous initiatives in the field, the EU-Morocco migration partnership has become increasingly strained. It should be noted that Morocco has begun to show signs of weariness as far as migration control and cooperation with the EU is concerned (Zaun, N. & Nantermoz, O., 2023; Benko, L., 2020; El Qadim, N., 2017). Some authors argue that this is the result of the EU externalizing its migration duties and obligations to developing countries - of which Morocco is no exception -, which are forced to enter such bargains in exchange for access to the EU's aid, trade, and development programs (Gross-Wyrtzen, L. & El Yacoubi, Z. R. 2024; Benko, L., 2020; Gijs, C., 2023; Zaun, N.

& Nantermoz, O., 2023). The EU's emphasis on this kind of conditionality has been criticized on several occasions as paternalistic, unfair, and reminiscent of neo colonialist tendencies. (El Qadim, N., 2017).

However, this is not as one-sided as it seems. Morocco has been able to leverage its position as the EU's gatekeeper - as far as migration is concerned - in order to further its political agenda. Notably, Morocco has at times "relaxed border controls a Ceuta and Melilla with the intention to exert pressure on the EU, in relation to the latter's position on regarding the conflict and illegal occupation of Western Sahara (Agence Europe b, 2021; Teevan C., 2018; Torreblanca, J. I., 2021).

1. 4. The EU's external action objectives in its diplomatic relations with Morocco.

Reigning in it all, as per article 21 of the Treaty on European Union, a key proclaimed aspect of the EU's relations with Morocco is the promotion of a rules-based international system, characterized by respect for human rights, the promotion of rule of law and democracy, as well as the defense principles of international law, among other factors (European Commission, 2023; Zardo, F. & Cavatorta, F., 2018; EURLEX, n.d.; Ryngaert, C., 2018). Not to mention the contents of article 2 of the Euro-Mediterranean Association Agreement, which states that both EU and Moroccan domestic and external policies shall be "*inspired*" by the democratic principles and fundamental rights established by the Universal Declaration of Human Rights. Furthermore, they shall constitute an essential element of this Agreement. However, it is in this latter domain that the EU is found wanting.

To elaborate, the EU's record in this context is a little bit shaky at best. While some reforms have taken place in terms of the independence of the judiciary and the increased powers given to the Moroccan Parliament, Morocco still underperforms in terms of democracy promotion, the rule of law, and respect for human rights (Goldstein, 2022). This is evident in the repression of the Hirak Rif protest movements between 2016 and 2017 or Morocco 's response to Sahrawi insurgence in the territories of the Western Sahara, as well as the continued occupation of said territories (Akouh, Y. & Debackere,

E., 2021; Colombo, S. & Voltolini, D., 2014; Amnesty International, 2022, Cordell, D. & Neset, T. -S. S., 2014).

In these cases, despite some formal condemnation from the EU, little action has been taken to sanction Morocco. This is not really that surprising. The EU often overlooks the actions of its more authoritarian partners in favor of trade, security, and stability (Zardo, F. & Cavatorta, F., 2018; Cavatorta, F. et al, 2006; Delreux, T. & Keukeleire, S., 2022; Mouhib, L., 2014). To add to this, as mentioned previously in this Master's Mémoire, Morocco is a key partner to the EU regarding conflict prevention, joint efforts to address irregular migration (Delreux, T. & Keukeleire, S., 2022). In other words, the EU tends to take more of a pragmatist approach in this regard, preferring stability over democratic reform and accountability.

In this regard, it should be taken into account that the EU's action in this context is not unitary. There is no single "EU-democracy-promotion" model within this context. The different initiatives revolving around democracy promotion, human rights and international law in this context are varied, and sometimes contradicting, as a result of the different goals and inputs of the numerous EU institutional actors and bodies involved in the region (Mouhib, L., 2014).

This dynamic can be observed in the European Instrument for Democracy and Human Rights (from hereinafter referred as EIDHR), a financial framework created in charge of funding civil society projects in third countries and, for the context of this Master's Mémoire, Morocco (Mouhib, L., 2014). Within this framework, the EU Parliament and the Council design the financial regulation of the EIDHR, while the European External Action Service (from here on out referred as EEAS) is tasked with drafting several strategy papers compiling the project's priorities and expected results (*id est*, programming) and the allocation of funds and the Directorate General Development and Cooperation (from here on out referred as DG DEVCO) is in charge of designing annual action plans and implementing EIDHR programs *inter alia* with EU delegation. The latter are also involved in political dialogue.

For example, while DG DEVCO is more concerned with democracy promotion, even at the expense of good relations with the host country, the EEAS and the EU Delegation

are far more interested in maintaining good relations with Morocco, so as to guarantee the success and adoption of EIDHR initiatives (Mouhib, L., 2014).

However, at the end of the day, the implementation of the EIDHR is contingent on the existence of good diplomatic relations with Morocco. For that very same reason the EU, as well as the myriad of institutional actors involved in this context, refrains from taking any action or enacting any initiative that may antagonize the hosting country. In the case of Morocco, that is in regards to the Western Sahara (Mouhib, L., 2014):

The EIDHR unit within DG DEVCO received a proposal supporting human rights in Western Sahara. However, the Head of the EU Delegation to Morocco vehemently opposed the project, which resulted in its exclusion. Mouhib, L. links this phenomenon to the EU Delegation's focus on maintaining good relations with Morocco, aiming to guarantee the development of economic and security bilateral cooperation (Mouhib, L., 2014).

However, I digress. The point I am trying to make is that the EU often overlooks the authoritarian tendencies of key commercial partners as long as stability is maintained (Bremberg, N., 2020; Delreux, T. & Keukeleire, S., 2022).

The literature on the field usually links this phenomenon to two main factors:

- As inferred in previous paragraphs, the EU is reluctant to criticize or sanction one of the few stable countries in the region, and a key partner in areas such as trade and security (Delreux & Keukeleire, 2022). Morocco was one of the few MENA countries to emerge from the “Arab Spring” somehow unscathed (Houdret, A., & Harnisch, A., 2018). In contrast, Libya descended into civil war, while Algeria and Tunisia have been mired in political instability ever since. Meanwhile, during this same period, Morocco authorities introduced several democratic reforms, notably expanding the powers bestowed upon the Moroccan Parliament and easing restrictions around the exercise of fundamental rights such as freedom of expression (Houdret, A., & Harnisch, A., 2018; El - Haddad, A., 2020; Willis, M. J., 2014). In this regard, Morocco appears to be more receptive of EU democracy-promotion initiatives, albeit with some notable exceptions (*id est*, initiatives involving human rights in the Western Sahara)

(Mouhib, L., 2014). In this sense, academics argue that the EU is wary that pushing for greater reform and/or imposing any kind of formal condemnation/sanctions on Morocco, fearing that such actions could undermine stability within the country and, in turn, jeopardize the security and stability of the EU's southern border (Delreux, T. & Keukeleire, S., 2022).

- Border control and the instrumentalization of migration (Miholjic, N., 2022; Bensaoud, M., 2020). This topic is primarily linked to discussions regarding the status of the occupied Western Sahara territories. In particular, the diplomatic tensions between Morocco and Spain over Spanish actions that Moroccan authorities perceive as sympathetic to the Saharawi movement (Agence Europe b, 2021). A clear example of this phenomenon can be found in the 2021 Morocco-Spain border incident, where thousands of migrants, reportedly instigated by Morocco, made some of the largest border crossing attempts at the Ceuta and Melilla crossing in decades (Agence Europe b, 2021).

These two scenarios are often cited in both the literature and the media as some of the reasons why the EU's stance against Morocco may appear lenient at times. The EU is concerned about taking any action that may jeopardize instability in the area and endangered its southern border (van Hüllen, V., 2019). Thus, the EU tries to stay clear and keep a low profile in this context (Bremberg, N., 2020; Delreux, T. & Keukeleire, S., 2022). This explains the EU's failure to uphold the main declared objectives and guiding principles of its external action in the context of its diplomatic and commercial relations with Morocco - most notably, the promotion of a rules-based international system, characterized by respect for human rights, the rule of law and democratic governance, among other factors (European Commission, 2023; Zardo, F. & Cavatorta, F., 2018; EURLEX, n.d.; Ryngaert, C., 2018).

1. 5. Literature review: a summary and preliminary conclusions of academic and journalistic publications on the topic of EU - Morocco relations.

To recapitulate, the relationship between the EU and Morocco is more complex than it seems at a first glance.

When it comes to trade, the EU tries to portray its trade relations with Morocco as mutually beneficial: Morocco gains access to European markets, investment and development aid; while the EU benefits from Morocco's natural resources and expands its consumer base (Langan, M., & Price, S., 2020; Grohol, M. & Veeh, C., 2023; Langan, M., & Price, S., 2020). However, in actuality, this relationship is generally quite one sided. For starters, the EU is the largest trading partner in this equation by far (European Commission, 2024). Moreover, as previously mentioned, critics argue that EU policies perpetuate neocolonial dynamics, evidenced by the pressure put on Morocco to unilaterally liberalize its economy and the dominance of Western firms in local markets (Ruckteschler, C., Malik, A. & Eibl, F., 2019). However, Morocco still retains control over natural resources such as phosphate and has minimized liberalization in targeted sectors through the use of non-tariff measures (NTMs) in an attempt to protect domestic industries (Ruckteschler, C., Malik, A. & Eibl, F., 2019; Langan, M., & Price, S., 2020). In essence, while the EU-Morocco commercial partnership presents opportunities, it also highlights significant challenges tied to dependency, inequality, and the uneven distribution of wealth.

While trade with Morocco is relatively minor in the grand scheme of things - it should be noted that commerce between the EU and Morocco accounts for roughly 1% of the former's trade flows (European Commission, 2024) -, Morocco remains a key partner for the EU on migration. This latter aspect has become one of the most covered and extensively studied facets of EU-Morocco relations in recent years. Especially due to its influence and how its link to the EU's border security and migration control policies.

This brings us to the fourth point I address in this chapter: the EU's promotion of its proclaimed values within the context of its diplomatic relations with Morocco. As previously mentioned, these values include democracy promotion, respect for international law, as well as adherence to and promotion of human rights. They represent both a key objective and a guiding principle of the EU's external actions in this context (Zardo, F. & Cavatorta, F., 2018). However, the EU's track record in this area has proven to be flawed at best, if not outright lacking (Zardo, F. & Cavatorta, F., 2018; Delreux, T. & Keukeleire, S., 2022).

As noted earlier, this phenomenon has been driven by several factors, with the primary one being the need to secure the stability of the EU's southern border and its immediate neighborhood (Bremberg, N., 2020; Delreux, T. & Keukeleire, S., 2022). EU officials believe that pushing too hard for democratic reform in the country might plunge Morocco into crisis. This possibility, echoing the instability experienced by other Northern African in the wake of the "Arab Spring", could jeopardize the EU's security as a whole and hamper trade relations in the region (Delreux, T. & Keukeleire, S., 2022).

Then there is Morocco's instrumentalization of migration - taking advantage of its position as one of the EU's key partners in this field - , which it uses to apply pressure on the EU (Teevan C., 2018).

In other words, these factors hinder the EU's efforts to develop and implement an effective external action and foreign policy with respect to Morocco

However, I believe these explanations to be somewhat lacking. In my opinion the two scenarios showcased above are mostly political in nature and do not fully convey the reality of the dynamics framing EU - Morocco relations.

Let us focus on the first scenario showcased above: the need to guarantee stability in the EU's southern border. Some experts argue that the EU's cautious approach towards Morocco is due to concerns that pushing too hard for democratic reforms or that criticizing the government's actions could destabilize the country (Bremberg, N., 2020; Delreux, T. & Keukeleire, S., 2022). This, in turn, might plunge Morocco into further instability and, possibly, conflict. The point of this, as already stated in the previous section, is to avoid a "post Arab Spring Libya" type of scenario, which ultimately could present a grievous threat to the EU's southern border.

However, this approach might be contributing to the very instability the EU seeks to avoid. This is most evident in the conflict over Western Sahara, where the EU has taken few concrete actions against Morocco for the illegal annexation of the territory. Instead, the EU seems to tacitly acknowledge Morocco's claim, with the exception of the Court of Justice of the European Union (from here on out referred to as CJEU) (Agence Europe, 2018; Agence Europe, 2019; Agence Europe, 2023; CJEU, 2018a). It is worth

noting that there is a risk that the conflict could escalate into open war with Algeria (Agence Europe a, 2021). Diplomatic relations between Algeria and Morocco have always been tense and in the later years have led to the development of an arms race between the two (Saddiki, S., 2020; Dworkin, A., 2022; Pavia, A. et al, 2022). These factors are quite relevant since both the conflict in Western Sahara and tensions with Algeria stem from the same source: Moroccan irredentism. In particular, the Greater Morocco Theses (Campos - Serrano, A. & Rodríguez - Esteban, J. A., 2017). This label is used by Moroccan irredentism to justify Morocco's claims and potential military expansion over the Western Sahara, parts of Mauritania and Algeria, as well as the Spanish cities of Ceuta and Melilla and its plazas de soberania. These factors raise the following question: where is the stability in that? Furthermore, the lack of real condemnation from most EU institutions and Member States have not contributed to peace in the region either. It should be clarified that the conflict in the Western Sahara is still ongoing, having been reignited in recent years (IISS, 2021). If anything, the EU turning a blind eye has contributed to increasing the turmoil in the region and perpetuating the abuses of Moroccan authorities over the Sahrawi population: kidnaps, threats, beatings, crackdown on protests (IISS, 2021; UN, 2023; Amnesty International, 2022; Amnesty International, 2023).

Regarding the second topic - weaponizing migration for political and geostrategic goals -, there is indeed truth behind the argument that Morocco can strong-arm the EU and influence its policy positions (Teevan C., 2018). We have already seen this on several occasions, particularly in the context of the Western Sahara and Morocco's subsequent attempts at flooding Spain's Ceuta and Melilla's border crossings, as previously mentioned (Agence Europe b, 2021; Teevan C., 2018; Torreblanca, J. I., 2021). However, I digress. Going back to the topic at hand, of course such actions constitute a destabilizing factor for the EU and its Member States, as far as border security and domestic stability are concerned (Teevan C., 2018; Agence Europe b, 2021). This phenomenon goes as far as having a direct impact in the framing of the EU's domestic politics, with far right, anti-migration, Islamophobic parties exploiting this phenomenon to mobilize voters against refugees and migrant communities in the EU.

However, I fear that the extent to which Morocco can influence EU domestic politics and that of its Member States is also a result of the latter's own doing. The EU's growing fear - or rather paranoia - regarding the potential destabilizing force of migration has led to the adoption of progressively harsher rhetoric and policies on border control and security (Blanc, E., 2022). To engage with this argument: yes, there are risks associated with migration. In a very limited number of cases, terrorists and criminal groups have infiltrated migrant and refugee groups to enter the EU undetected (Léonard, S., Kaunert, C., 2021; Savun, B., & Gineste, C., 2018). And yes, some migrants and refugees, though not originally criminal or terrorist elements themselves, have become so after arriving in Europe and undergoing subsequent radicalization (Savun, B., & Gineste, C., 2018; Eleftheriadou, M., 2018). But those numbers are infimal. If anything, this is a result of the EU and its Member States' failure - and lack of political will - to properly integrate migrants and refugees into European society. This is exacerbated by the fact that the EU de facto identifies refugees and migrants as a threat, a phenomenon that experts have termed "securitization" (Léonard, S., Kaunert, C., 2021; Asderaki, F., Markozani, E., 2021). This is so widespread nowadays that we even have two schools of thought to properly assess such a phenomenon: the Copenhagen and Paris Schools (Léonard, S., Kaunert, C., 2021; Asderaki, F., Markozani, E., 2021; Ileri, M. B., 2019; Ari, T., 2023). In brief, the Copenhagen School identifies securitization as a product of successful speech (i.e., online, political, academic, etc). Meanwhile the Paris School argues that securitization is a byproduct of policy, law as well as bureaucratic decisions that, in this context, identify migrants as a potential threat. This kind of policy seeps into the mind of the public, which in turn starts addressing these collectives in similar fashion (*id est*, as a threat). However, I digress.

Rather than concentrating solely on migration and security narratives, I would argue one should also account for the economic interests at play, such as access to markets and raw materials. In my opinion, these factors are far more significant drivers of conflict than electoral motivations such as fear-mongering about migration and refugees.

In my opinion, this is where phosphate comes into play. The reader may recall the mention of this mineral compound at the beginning of this chapter. Though Morocco

represents but a minutia of the EU's global trading flows - just but a measly 1% -, the EU and vast sectors of its economy are heavily reliant on Moroccan phosphate (European Commission, 2024; Kasprak, A., 2016; Grohol, M. & Veeh, C., 2023). And yet, this is not something you would easily understand by analyzing the statistical data readily available on EU - Moroccan trade, as well as other academic publications on the matter. Even on the EU's main website and in its trade documents, this information is not readily available nor immediately apparent (European Commission, 2024; European Commission a, n. d.). Some scholarly articles mention Moroccan phosphate in relation to the EU, particularly in connection with the abundance of this mineral in Western Sahara and its links to the ongoing conflict in the region (Kasprak, A., 2016; Shelly, T., 2005).

In any case, in order to properly assess this phenomenon you would need to access publications such as the EU's publications on critical raw materials, including but not limited to: "Study on the EU's list of Critical Raw Materials (2020) - Critical Raw Materials Factsheets (Final)" (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020) or "Study on the critical raw materials for the EU 2023: final report" (Grohol, M. & Veeh, C., 2023).

To summarize, I have found that the coverage of EU-Morocco relations is highly dominated by migration and security studies, especially pertaining to the EU's position in the Western Sahara. That being said, some articles include a side note citing Morocco's role as the EU's main phosphate supplier and the holder of the biggest phosphate reserves in the world or the existence of vast reserves of this critical raw material in the occupied territories (Allan, J. & Ojeda García, R. 2021; Sakthivel, V., 2016; Cavanagh, M., 2021; Lovatt, H., 2020; Associated Press, 2024; Benabdallah, K., 2009;). Furthermore, some articles have started to cite Morocco's role in the phosphate market and its geopolitical implications (Reina, M. G., 2023). In other words, public discourse on the topic focuses mostly on the migration and security aspects of these relations, while the matter of phosphate trade remains somehow untapped or at least it is not discussed publicly, with some notable exceptions - the issue of phosphate trade between the EU and Morocco prompted two parliamentary questions before the EU Parliament, one in 2015 and another in 2023, on the nature of this trade, as well as

phosphate originating from the Western Sahara (European Parliament, 2015; European Parliament, 2023).

Thus, I would suggest studying the EU-Morocco phosphate trade in order to understand its influence on the development of bilateral relations between the two polities. The latter might not be as salient a topic as the migration control and stability arguments showcased above, but I would argue it is crucial to understanding the EU's interests in the country.

For that very purpose, the next chapter of this Master's Mémoire shall be focused on what phosphate is, as well as identifying its uses in the EU economy and the dynamics of the EU's phosphate supply chain.

Part 2: Phosphate, a Critical Raw Material: EU trade, supply and demand.

2. 1. Problematization.

As to continue with the argument I presented in the previous chapter, much of the literature and media coverage on EU-Morocco relations centers on migration and security cooperation.

While these narratives are indeed a valid way to study the framing of EU - Morocco relations, I believe such an approach might be a little bit reductionist. Yes, it makes sense to study the topic of EU - Morocco relations through the lenses of migration cooperation and stability. But I fear such an approach might be a little bit flawed and does not truly encompass the full extent of this phenomenon.

As showcased in the first chapter of this Master's Mémoire, Morocco is the EU's 18th biggest trade partner, accounting for 1.1% of the EU's total trade figures in 2023 (European Commission, 2024). Meanwhile, the EU is Morocco's largest trade partner, accounting for 56% of its trade in the same year. Trade between the two amounts to €58.398 billion, with 64.9% of Morocco's trade goods being exported to the EU and 50.7% of Morocco's imports coming from the EU (European Commission, 2024).

The existing literature on EU-Morocco relations often portrays this relationship as markedly one-sided. Not only does Morocco heavily rely on trade with the EU but it is also a major recipient of EU development aid, underscoring in my opinion its strategic economic dependence. (European Commission, 2024; Zaun, N. & Nantermoz, O., 2023; Harrison et al, 2020; Hoekman, B., 2016).

However, this narrative overlooks a crucial counterpoint: the EU's own dependence on Morocco. Despite Morocco being the junior partner in this relationship, the EU heavily relies on its neighbor to the south on a key issue: the acquisition of phosphate. Several EU reports have highlighted the risk the Union faces by relying too heavily on a small number of external partners for the supply of key inputs for its economy - notably, when

it comes to the EU's reliance on Moroccan phosphate (SCRREEN, 2020; Directorate General for Internal Policies, 2024).

Therefore, the present chapter consequently analyzes the structural characteristics of EU-Morocco phosphate trade and evaluates its impact on the European economy, as well as how it might impact the latter's capacity to formulate an autonomous external action. For context's sake, the concept of strategic autonomy stands for the capacity of the EU to act autonomously - that is, without being dependent nor hindered by other countries - in strategically important policy areas. These can range from defence policy to the economy, and the capacity to uphold democratic values. More specifically, the concept of strategic autonomy can be understood as the EU's attempt at maximizing its own agency in the world of geopolitics. That being said, that very same agency will never be absolute and must be studied alongside the concept of interdependence. The EU, be it because of its geographical location, its capabilities, or the global distribution of natural resources (to name a few), faces certain hurdles and limitations which it tries to mitigate through trade partnerships, enhanced cooperation with third countries in matters of security and other initiatives. Such is the case of phosphate rock, a critical raw material for the EU economy. The EU has limited access domestically to this natural resource and, thus, it heavily depends on exports from third countries in order to meet its phosphate demands, primarily from Morocco and Russia. (Kasprak, A., 2016; Grohol, M. & Veeh, C., 2023). In this sense, the core idea behind the concept of strategic autonomy is to ensure that these partnerships and interdependence do not become a liability for the EU. In other words, that the EU's dependence on third actors is not used against it, or exploited in order to hamper the Union's interests. In essence, the relation between the concepts of strategic autonomy and interdependence can thus be seen as some sort of balancing act between the EU's ties with external actors and the pursuit of its own geopolitical considerations (*id est*, its interests, values, objectives, policies, etc.). However, I digress.

This begets the following questions: What is phosphate? And how come it is of so much importance for the EU?

2. 2. Phosphate rock. A Critical Raw Material.

Phosphate rock, otherwise known as Phosphorite, Apatite or Apatite concentrate (Keersemaeker, M., 2020), is the main anthropogenic source of phosphorus (Mew, M. C., 2016; Geissler, B., Steiner, G., Haneklaus, N. & Mew, M., 2023).

Moreover, phosphate rock is of key importance for the functioning and competitiveness of modern economics such as that of the EU's - as well as those of its Member States -, due to phosphate's important role in key economic and strategic sectors such as high-tech, food production, green technologies and digitalization (Hool, A., Helbig, C. & Wierink, G., 2024; Grohol, M. & Veeh, C., 2023; EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020; Bobba, S., Carrara, S., Huisman, J., Mathieux, F. & Pavel, C., 2020; Tulsidas et al., 2019; Hool, A., Helbig, C. & Wierink, G., 2024; Keersemaeker, M., 2020).

Given these reasons, among many others, the EU formally designated phosphate rock as a critical raw material back in 2014 (Grohol, M. & Veeh, C., 2023). In order to provide a little bit of context, it should be noted that a Critical Raw Material is a mineral or metal that is economically important for key industries but faces high supply risks due to geopolitical, environmental, and / or technological factors/constraints (Rabe, W., Kosta, G. & Smith Stegen, K., 2017; Hool, A., Helbig, C. & Wierink, G., 2024; Keersemaeker, M., 2020; De Decker, V., 2023).

The first EU Critical Raw Material list was drawn out in 2010 by the Ad - Hoc Working Group on Defining Critical Raw Materials, containing fourteen initial critical raw materials (European Commission b, n. d.; De Decker, V., 2023). Since then, this list has expanded continuously, incorporating an increasing number of minerals and metals (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020; Grohol, M. & Veeh, C., 2023; Keersemaeker, M., 2020). As stated two paragraphs earlier, the EU designated phosphate rock as a critical raw material back in 2014 (Grohol, M. & Veeh, C., 2023).

This process has culminated in the drafting and further approval of the Critical raw Materials Act (Hool, A., Helbig, C. & Wierink, G., 2024). Proposed by the EU Commission in 2023, this piece of legislation aims to reduce costs associated with their

procurement and processing, while enabling the EU's to mitigate potential supply disruptions and other risks. (Hool, A., Helbig, C. & Wierink, G., 2024).

As stated earlier in this section, a key indicator of what constitutes a Critical Raw Material is its economic importance (*id est*, its use in a particular economy and its strategic industries, its role in the value chain, etc.) (European Commission b, n. d.; Achzet, B., Helbig, C., 2013; Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Buijs, B., Sievers, H. & Tercero Espinoza, L. A., 2012; Keersemaeker, M., 2020). Other factors to be considered are the supply risk ascribed to a particular natural resource, environmental and sustainability factors, as well as technological and substitution challenges.

The question I would like to formulate is: what are the specific properties and strategic considerations that justified the classification of phosphate rock as a Critical Raw Material in the EU? Furthermore, how does this relate to the EU-Morocco phosphate trade?

2. 2. 1. The economic importance of phosphate rock in the EU economy.

Phosphate rock and its derivatives are essential for the functioning and competitiveness of the EU economy - as well as that of its Member States (Mew, M. C., 2016; Geissler, B., Steiner, G., Haneklaus, N. & Mew, M., 2023; Tulsidas et al., 2019; EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al 2020).

As previously stated, phosphate rock is the main anthropogenic source of inorganic phosphorus (Mew, M. C., 2016; Geissler, B., Steiner, G., Haneklaus, N. & Mew, M., 2023; Tulsidas et al., 2019; EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al 2020). The process of transforming phosphate into inorganic phosphorus involves two primary methods: the thermal reduction process (using electrothermal furnaces), and the wet chemical acid digestion process, also known as “wet process” (Abouzeid, A. - Z. M., 2008). This results in the further processing of phosphate into elemental phosphorus (white/yellow phosphorus and red phosphorus), phosphoric acid and other phosphate derivatives. White phosphorus is usually employed in the military industry for the production of explosives and chemicals, while red phosphorus has more of what we would deem as a civilian purpose.

Let's take phosphoric acid as an example. One of the most common uses of phosphoric acid and, as an extension, phosphate rock, is the production of fertilizers, usually Diammonium and Monoammonium phosphate (Zapata, F. & Roy, R. N., 2004; Cordell, D. & White, S. B., 2011; Cordell, D. & Neset, T. -S. S., 2014; Bontempi, E., 2017; OECD, 2015). It should be noted that phosphate fertilizer production in the EU is quite modest. Industry data from Fertilizer Europe, an organization representing the majority of fertilizer producers in Europe, estimated that fertilizer production in the EU in 2020 amounted to 18.3 million tonnes, of which phosphate based fertilizers accounted for 12% of the Union's share (Fertilizer Europe, 2022). Nevertheless, the EU employs 86% of its phosphate rock reserves for the production of phosphate based fertilizers (Grohol, M. & Veeh, C., 2023; EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020). Moreover, according to Eurostat, EU phosphate rock and phosphorus imports account for nearly 10% of the entire world's production of artificial phosphate fertilizer (Eurostat, 2022).

Beyond agricultural applications, phosphate rock is a key component of the EU's pharmaceutical and chemical industries. (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020). After being turned into phosphoric acid and elemental phosphorus, phosphate rock is used in the production of various medications, including laxatives and anticaking agents, tooth paste, etc. Similarly, phosphate rock is used in the manufacturing of flame retardants for textiles and plastics, improving ceramics and glass, producing oil additives and metal treatments, as well as making matches and pyrotechnics, among many other uses (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al 2020). In a similar vein, phosphate rock is also used in the production of detergents, mainly dishwasher and laundry detergents, as well as phosphate based products for water treatment to prevent scale formation and corrosion in pipes and boilers (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020).

It is also important to highlight the importance of phosphate rock in the EU high tech sector. For example: phosphate rock, after being processed into phosphoric acid, becomes a key component of silicon wafers in semiconductors; phosphate based retardants are used in order to prevent overheating in electronic devices as well as

military equipment, the production of explosives, etc. (Bobba, S., Carrara, S., Huisman, J., Mathieux, F. & Pavel, C., 2020; Abouzeid, A. - Z. M., 2008).

Phosphate rock is also used for the production of animal feed and phosphate supplements, which account for 10% of phosphate rock used in the EU (Grohol, M. & Veeh, C., 2023; OECD, 2015). In this regard, according to the European Feed Manufacturers' Federation (FEFAC), the EU accounts for 15% of the global production of phosphate compound feed in the world (FEFAC, 2020).

Phosphorus and, by extension phosphate rock, is also crucial for the pharmaceutical industry. The EU dedicates approximately 4% of its phosphate rock reserves to meet the demands of its pharmaceutical and chemical industries (Grohol, M. & Veeh, C., 2023). Phosphate is likewise used in the EU's food production industry, to produce food additives, preservatives, and nutritional supplements (Thangavelu, K. P., Kerry, J. P., Tiwari, B. et al, 2019; OECD, 2015). As such, phosphate based additives, preservatives and nutritional supplements can be found in food products such as milk, buttermilk, dairy by - products, whey protein, etc.

Lastly, another use for phosphate is the extraction of uranium (Tulsidas et al., 2019). Phosphate rock contains traces of uranium, which can be extracted during its conversion into fertilizer. During this process, sulfuric acid is used to produce phosphoric acid (Singh, D. K., et al., 2016), which leads to uranium being extracted into the phosphoric acid solution. Afterward, uranium is extracted from the phosphoric acid using an organic solvent, then stripped and purified until uranium oxide is obtained (Singh, D. K., et al., 2016). This practice was quite common up until the 1980s and the 1990s, when declining uranium prices made it unprofitable (Tulsidas et al., 2019). Currently the use of this “technique” is marginal due to its low yield, though there is potential for further development (Kim, H., Eggert, R. G., Carlsen, B. W. & Dixon, B. W., 2016; Michael, A., Varnava, N., Ioannidis, I. & Pashalidis, I., 2024).

2. 2. 2. Supply risk indicators and Phosphate.

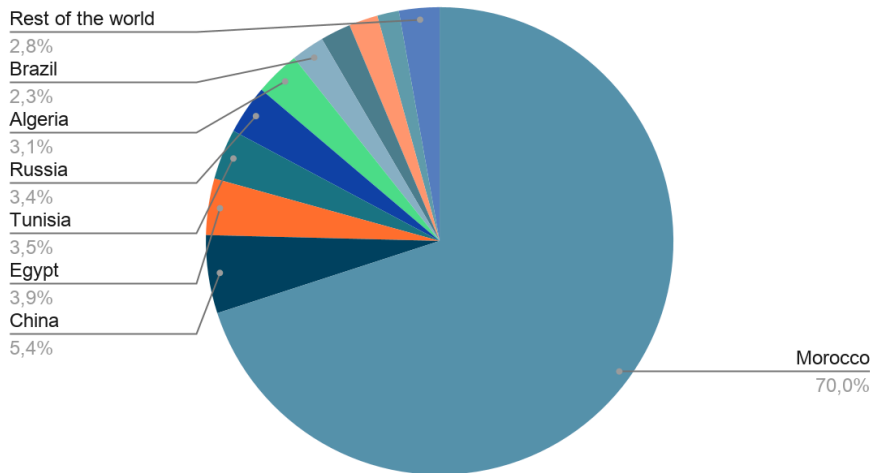
As previously stated, another crucial aspect that determines the “criticality” of a particular natural resource is its supply vulnerability (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016).

In other words, and as per the object of this Master's Mémoire, these factors represent the potential limitations and obstacles to the physical supply of phosphate, ranging from its uneven geological distribution within a limited set of countries to trade balances, technical difficulties in extraction and production that may reduce its availability, etc (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Frenzel, M., Kullik, J., Reuter, M. A. & Gutzmer, J., 2017; Mancini, L., Benini, L. & Sala, S., 2016).

- **Global distribution of phosphate.**

In this regard it should be noted that the global distribution of phosphate is quite uneven, with just five nations controlling 90% of global deposits. Morocco holds 70% of the world's phosphate reserves, accounting for roughly 50 billion tonnes (El Bamiki, R., et al., 2021; de Ridder et al., 2022). The second country with most phosphate deposits is China, which only accounts for 5.4% of global phosphate reserves, or 3.8 billion tonnes (Liu, X., Zhang, Y., Cheng, M., Jiang, S. & Yuan, Z., 2023; U.S. Department of the Interior, 2024). Such factor increases the possibility of supply risk due to the collapse of production capacities within said country, the use of commerce in order to further said countries political agenda in the international stage (*id est*, embargoes and trade barriers, exports bans); economic and resource nationalism leading to the prioritization of domestic demand over international trade, among other factors (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Hofmann, M., Hofmann, H., Hagelüken, H. & Hool, A., 2018; OECD, 2014; Blengini, G. A. et al., 2017).

Global distribution of phosphate deposits by country



4

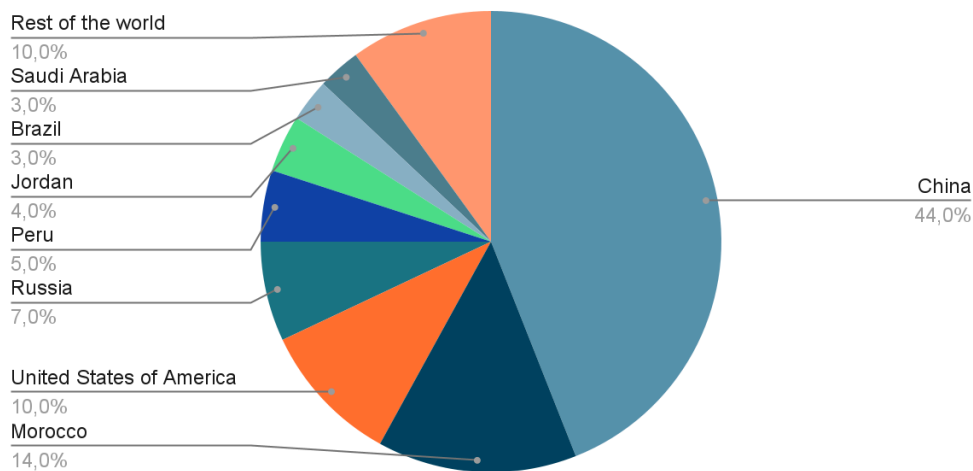
● Phosphate trade balances and production concentration

Another factor to take into account in this context is the potential impact of trade balances and production concentration. As stated in the introduction to this research, the production of phosphate in the EU is minimal. This is due, primarily, to the absence of any sizable phosphates deposits in the EU (Kasprak, A., 2016; Grohol, M. & Veeh, C., 2023). The Siilinjärvi mine in Finland is one of the few mines within the EU producing phosphate. In total domestic production accounts for roughly 17% of the EU's phosphate demand. Thus, the EU relies on imports in order to meet 82% of its phosphate needs (Kasprak, A., 2016; Grohol, M. & Veeh, C., 2023).

The extraction of phosphate takes place, predominantly within a limited set of countries. In this sense, the biggest producers by country are China (accounting for roughly 44% of all production), followed by Morocco (14%), United States (10%) and Russia (7%) (Grohol, M. & Veeh, C., 2023).

⁴ Personal elaboration based on Statista (n. d.), El Bamiki, R., et al. (2021), de Ridder et al. (2022) & Liu, X., Zhang, Y., Cheng, M., Jiang, S. & Yuan, Z. (2023) & U.S. Department of the Interior (2024).

Main phosphate producers, global market



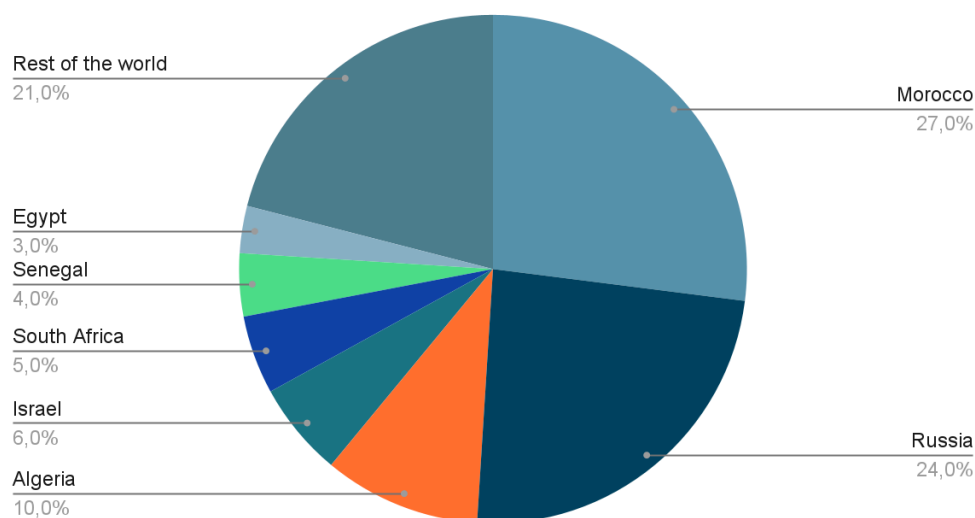
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However, it is worth noting that, despite being two of the largest phosphate producers in the world, China and the United States of America (from here on out referred to as US) are not the EU's largest phosphate suppliers. In fact, they do not count themselves among the EU's top 5 phosphate rock suppliers. This is mostly due to the fact that China and the US prioritize using the phosphate they extract in order to meet domestic demand (de Boer, M. A., 2018).

Morocco is the biggest phosphate supplier to the EU, accounting for more than 27% of the Union's phosphate imports (Grohol, M. & Veeh, C., 2023; CRU, 2023; WSRW, 2023). Morocco is then followed by Russia, which accounts for 24% of the EU's phosphate rock imports. Finland, the EU's only domestic producer, covers just 17% of demand, while Algeria and Israel account for 10% and 6% of the EU's imports of this kind, respectively (Grohol, M. & Veeh, C., 2023).

⁵ Personal elaboration based on Grohol, M. & Veeh, C. (2023).

Top phosphate suppliers to the EU



6

As per the relevance of all these facts, it should be noted that trade imbalances and high levels of market concentration contribute to further destabilizing global availability of a particular natural resource (David, M., Lyth, S.M., Lindner, R. & Harrington, G. F., 2021; Cordell, D. & Neset, T. - S. S., 2014). Over - reliance on a limited number of suppliers increases the chance of potential supply disruptions caused by natural disasters, infrastructure failures, or labor strikes in key producing regions (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Blengini; Mehahad, M . S. & Bounar, A., 2020). Not to mention the potential collapse of production capacities in said countries. Additionally, dominant producers may exploit their market position by creating artificial shortages or arbitrarily raising prices in order to further their political and economic agendas, as seen with the likes of the OPEC and its members. This could ultimately lead to market volatility and supply insecurity.

Similarly to the concentration of phosphate extraction by countries, a concentration of production within a limited number of companies may lead to an increased supply risk (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016). Especially when the producing company is linked to or owned by the governments of said countries. This is precisely the case of Morocco, as the biggest phosphate supplier to the EU. All phosphate extraction in Morocco, along with its processing into phosphorus,

⁶ Personal elaboration based on Grohol, M. & Veeh, C. (2023), CRU, (2023) & WSRW(2023).

phosphate-based fertilizers, and other derivatives such as phosphoric acid, is managed by a single entity: the Office Chérifien des Phosphates (referred to hereafter as the OCP Group) (Mehahad, M. S. & Bounar, A., 2020). In this sense, a producer could deliberately restrict exports or impose price hikes as political leverage, as a resort of deteriorating diplomatic relations or in pursuit of economic, political or geostrategic goals (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016).

- **Technological & Substitution Challenges.**

Technological barriers surrounding the extraction and processing of a particular natural resource represent a key factor when it comes to designating Critical Raw Materials (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Frenzel, M., Kullik, J., Reuter, M. A. & Gutzmer, J., 2017; Mancini, L., Benini, L. & Sala, S., 2016). This category encompasses multiple technical and logistical factors that affect resource availability, including: minerological complexity and ore quality, extraction capacities and deposit depth, reserve depletion, the availability of secondary or auxiliary resources, etc (Graedel & Reck, 2015; Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Frenzel, M., Kullik, J., Reuter, M. A. & Gutzmer, J., 2017; Martins & Castro, 2020). The latter makes reference to the availability of other factors such as water, human labour, transport infrastructures, energy, specialized machinery, etc (Hofmann, M., Hofmann, H., Hagelüken, H. & Hool, A., 2018; Graedel, T. E. & Reck, B. K., 2015).

Further expanding upon this latter topic, a notable issue that might impact the extraction of phosphate and, by extension, its supply is the lack of water in mining countries. Most deposits require high-pressure water jets to fracture soft rock into slurry (Cordell, D. & Neset, T. -S. S., 2014).

In this sense, let's take a look at Morocco's case. As said throughout this Master's Mémoire, Morocco holds roughly 70% of all phosphate rock deposits in the world (El Bamiki, R., et al., 2021; de Ridder et al., 2022). However, this does not make Morocco the biggest phosphate producer in the world. That would be China (40% of the world's share), followed by Morocco (17%) (El Bamiki, R., et al., 2021). One of the reasons as to why Morocco might lag behind countries such as China is due to the lack of available water and other technical difficulties surrounding the extraction of this mineral

compound (Li, B. et al, 2023; Cordell, D. & Neset, T. -S. S., 2014; Mehahad, M . S. & Bounar, A., 2020). Drought has taken a toll on Morocco, and water reserves are at an all time low since 2015 - Morocco's reservoirs were 25 percent full in mid-February 2024 (NASA, 2024). This means that Morocco lacks the water it needs for the purpose of mining phosphate, as the sector competes against other claims and critical demands for available water such as drinking and irrigation for agricultural purposes (Mehahad, M . S. & Bounar, A., 2020).

Moreover, phosphate ore often contains traces of heavy metals, such as cadmium and uranium (Cordell, D. & Neset, T. -S. S., 2014; Ryszko, U., Rusek, P., & Kołodyńska, D., 2023; de Boer, M. A., Wolzak, L. & Slootweg, J. C., 2019). The presence of these heavy metals in phosphate rock poses a threat to both the environment and the health of humans (Suciu, N. A., Vivo, R., Rizzati, N. & Capri, C., 2022; Ulrich, A. E., 2019). Removing these heavy metals through processes like decadmiation is expensive, making the extraction and processing of phosphate rock more difficult and resource - intensive. In addition, phosphate ore contains large amounts of sand waste, mine slimes, radionuclides, as well as various metals and trace elements, including chlorine, fluorine, calcium carbonate, magnesium carbonate, iron trioxide, aluminum oxide, and calcium fluoride, among others (Chen, M. & Graedel, T. E., 2015; Derhy, D., Taha, T., Hakkou, R. & Benzaazoua, M., 2020; Tan, Y., 2021). In other words, the presence of all these elements and impurities ultimately increases the technical challenges of processing phosphate rock and influences whether it can be done under economically favorable conditions.

Then there is the matter of deposit depletion. Some studies suggest that phosphate reserves could be exhausted within the next 50 to 100 years. However, it is important to note that the physical depletion of phosphate is not an actual concern (Scholz, R. W., Wellmer, F. - W., Mew, M. & Steiner, G., 2025; Martins, F. & Castro, H.). Long term estimates state that existing phosphate reserves could last 300 to 1000 years at current production rates, under conservative assumptions (Brownlie, W. J., Alexander, P., Cordell, D. et al, 2024; Scholz, R. W., Wellmer, F. - W., Mew, M. & Stenire, G., 2025). When we discuss the matter of “deposit depletion”, this refers to the decline and depletion of economically viable phosphate deposits in major mining regions (*id est*,

deposits that can be exploited given the current level of technological development, mining capacity, and socio-economic impulse in producing countries). This phenomenon is reflected in the depletion of high-grade ore in mining countries like China and the US as a result of growing environmental and regulatory barriers, declining phosphate ore quality, and geopolitical constraints (Brownlie, W. J., Alexander, P., Cordell, D. et al, 2024; Amar, H., Benzaazoua, M., Elghali, A. et al, 2022; Cordell, D. & White, S. B., 2011). Along these lines, some analysts predict potential regional supply shortages by 2050 unless three key developments take place: a major expansion of recycling systems, the advancement of new extraction technologies, and the successful creation of alternative fertilizers (Liu, X., Zhang, Y., Cheng, M. et al 2023; Jiang, S., Hua, H., Sheng, H. et al, 2019).

It should be noted that phosphate rock has a substitution index of 0.96 and 0.99, calculated separately for both Economic and Supply Risk parameters, (respectively) (as per (Grohol, M. & Veeh, C., 2023)). The substitution index quantifies and assesses how easy it is to replace one item/material with another. Said index is represented on a 0 to 1 scale, where the numeral 0 indicates high substitutability, whereas the numeral 1 signals that particular critical raw material is high irreplaceable. Factors such as technical performance of possible substitutes, cost performance, substitute availability and criticality are taken into consideration when calculating said index (Blengini, G. A. et al., 2017; Grohol, M. & Veeh, C., 2023).

In other words, phosphate is high unsubstitutable. There are instances where it would be possible to bypass these hurdles, and find a substitute for phosphate. For example, it is feasible to forego the use of phosphate in fertilizer production by resorting to nitrogen-based alternatives. Furthermore, research is being undertaken regarding phosphorus recovery and recycling from wastewater and animal manures.

However, that is not the case when it comes to nutritional sources and the food production industry. As previously stated, phosphate is a key element in the production of both food additives and preservatives. Though alternatives to inorganic phosphate such as algae or animal-based ingredients do exist, they are not as efficient as their phosphatic counterparts (Molina, R. E., Bohrer, B. M. & Vásquez Mejia, S. M., 2023). Furthermore, most research in this field finds itself in its infancy. Therefore, there are

no short term alternatives in this field that could effectively replace phosphate without significantly compromising performance, quality, or functionality.

Moreover, while large seabed deposits exist worldwide, they are not considered to be economically viable at present, taking into account their remote location, current technology levels and the difficulty associated with their extraction (Cordell, D. & White, S. B., 2011).

- **Environmental, Sustainability, Social and Regulatory Factors**

Factors such as sustainability, ethical sourcing, the challenges of finding viable substitutes, and regulatory requirements also play a role in determining a natural resource's criticality and, by extension, its classification as a Critical Raw Material.(Hofmann, M., Hofmann, H., Hagelüken, H. & Hool, A., 2018; Graedel, T. E. & Reck, B. K., 2015; Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Martins, F. & Castro, H., 2019; Lütkehaus, H., Pade, C., Oswald, M. et al., 2022).

Low recycling rates put additional pressure on the availability of finite resources. In this context, it is important to note that there are no true substitutes for phosphate rock, apart from end-of-life recycling. Currently phosphate has a recycling rate of 0% for chemical applications and 17% for fertilizer production (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020; Geissler, B., Steiner, G., Haneklaus, N. & Mew, M., 2023).

The negative environmental impact associated with the extraction and processing of Critical Raw Materials could lead to the implementation of strict regulations that limit these activities, and thus impact their availability. . Phosphate mining and its further processing are linked to underground groundwater pollution, eutrophication, and the growth of toxic cyanobacteria in surface water bodies (OECD, 2015). Not to mention air pollution. Notably, China has significantly reduced its domestic phosphate production in recent years, largely in response to environmental protection policies aimed at reducing pollution from phosphate mining operations (Jiang, S., Hua, H., Sheng, H. et al, 2019; Shen, w., Li, S., Zhuang, Y., He, J., Liu, H.. & Zhang L., 2023; Chow, E. & and Patton, D., 2022).

Additionally, some studies emphasize the importance of normative, social, and cultural factors, noting their potential to disrupt the free flow and supply of Critical Raw Materials (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Blengini et al., 2017; Lütkehaus, H., Pade, C., Oswald, M. et al, 2022). These factors are not inherent to the extraction or sourcing of Critical Raw Materials but are instead external sociological and normative issues that can threaten supply chains in this context.

For instance, trade restrictions on natural resources from conflict zones, occupied territories, or politically unstable regions can impact supply. The EU has addressed this through legislation such as the EU Conflict Minerals Regulation. (Blengini, G. A. et al., 2017; Hanai, K., 2021; Koch, D. - J. & Kinsbergen, S., 2018). This regulation aims to prevent the import and trade within the EU of minerals sourced from conflict-affected and high-risk areas, specifically tin, tantalum, tungsten, their ores, and gold (Regulation (EU) 2017/821).

With this in mind, let's focus our analysis on Morocco, the EU's primary phosphate supplier. As mentioned in earlier sections, Morocco holds the world's largest phosphate rock reserves, which are spread across both Morocco itself and the occupied territories of Western Sahara (de Ridder et al., 2022; OECD, 2015). It is important to note that Western Sahara is considered an illegally occupied territory under international law, and that the conflict between Moroccan authorities and Front Polisario forces is ongoing. (ICJ, n.d.; Sanasawal, K., & Kamath, R., 2020; Ferrer Lloret, J., 2022; Zunes, S., & Mundy, J., 2022; Besenyő, J., 2017).⁷ If we pay heed to the Conflict Mineral Regulation, phosphate rock extracted from the occupied territories of Western Sahara (through the OCP Group) should be subjected to the same conditions as minerals obtained from conflict and illegally occupied areas (Regulation (EU) 2017/821). But, for some reason, that is not the case. However, there may come a day when Moroccan phosphate sourced from the occupied territories of Western Sahara falls under the scope of the Conflict Mineral regulation (European Parliament, 2023). Thus, under such a scenario, the smooth supply of phosphate to the EU would surely take a hit.

⁷ The Front Polisario is an organisation that was created in Western Sahara on 10 May 1973. In Article 1 of its articles of association it defines itself as a national liberation movement whose members fight for full independence and for recovery of the sovereignty of the Sahrawi people throughout the entire territory of the Western Sahara.

Once again, while this is not the case at present, it is a factor that should be considered. Moroccan authorities claim the phosphate extracted in the Western Sahara is minimal, accounting only for only 2% of Morocco's total phosphate reserves or 4.6% of its total revenue, as well as around 8% of the total rock extracted (WSR, 2024; OCP, n. d.; OCP, 2018). However, third-party data suggests that Moroccan phosphate production in Western Sahara accounts for approximately between 14% of global output (Kasprak, A., 2016; Nasa, 2018; Tanchum, M., 2022).

Another crucial factor to consider is stability. Both national and corporate stability in countries that produce or export Critical Raw Materials can significantly affect the reliability and security of their supply chain (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016). This latter concept of stability encompasses a wide range of concerns, including the risk or presence of war, social and economic upheaval, regional fragmentation, and poor governance, and many other factors (Blengini, G. A. et al., 2017). This also includes issues like human rights violations, child labor, and widespread corruption in mining or production regions, which further complicate efforts to maintain a stable supply of Critical Raw Materials. In this regard, instability not only threatens the physical availability of Critical Raw Materials but also raises ethical and sustainability concerns, which could influence global supply chains and markets (Dewulf, J., Blengini, G. A., Pennington, D., et al, 2016; Blengini, G. A. et al., 2017; Martins, F. & Castro, H., 2019).

A clear example of this phenomenon is social unrest and disgruntled workers. In such cases, societal upheaval can lead to a slowdown in production, ultimately negatively impacting phosphate exports and supply. In the case of Morocco, the EU's largest phosphate supplier, while the “Arab Spring” protests (2011-2012) were largely driven by demands for political and social reform, some organizers also advocated for reforms in the mining sector (Mehahad, M . S. & Bounar, A., 2020). Though peaceful protests had already been taking place since 2008, protesters originating from phosphate mining communities such as Gantour basin, namely from the Benguerir and Youssoufia mines, joined the Arab Spring protests in 2011 over conflicts relating to local employment, marginalization, regional development and demands for better wealth redistribution (Mehahad, M . S. & Bounar, A., 2020). Protests and strikes often result in worker

absenteeism or labor shortages, slowing down mining operations. Political instability may cause companies to halt activities due to safety concerns or government intervention. Protests and strikes often result in worker absenteeism or labor shortages, slowing down mining operations. Moreover, political instability may cause companies to halt activities due to safety concerns or government intervention.

To this must be added the longstanding demands and protests from mining communities in Morocco over water scarcity (Mehahad, M. S. & Bounar, A., 2020). As discussed earlier, this issue could also disrupt phosphate production and could ultimately threaten the overall supply of phosphate. Mining communities have suffered shortages or even denied access to water due to increasing pressure on groundwater deposits from mining activities (Mehahad, M. S. & Bounar, A., 2020).

Furthermore, as hinted throughout this Master's Mémoire, a sizable part of "Moroccan" deposits are found in the occupied territories of the Western Sahara (El Bamiki, R., et al., 2021; de Ridder et al., 2022). To reiterate, it is speculated that Western Saharan deposits account for 14% of the globe's phosphate reserves (Nasa, 2018). According to OCP's export data, 22% of all Moroccan phosphate rock exports in 2016 were shipped from El Aaiún, most likely originating from the Bou Craa mine (OCP, 2018; Brownlie, W. J. & Sutton, M. A., 2022). These territories have been under Moroccan occupation since 1975-1976 (Smith, J. J., 2015; Zunes, S., & Mundy, J., 2022). The ongoing conflict in Western Sahara has the potential to disrupt, or even severely hinder, phosphate supply. Conflict could damage mining infrastructure, transportation networks, or port facilities, causing delays or halting exports. Additionally, blockades of roads, railways, or ports could prevent phosphate from reaching key export hubs like El Aaiún. Not to mention the possibility of Western Saharan phosphate falling within the scope of application of the Conflict Minerals Act (European Parliament, 2023). It is important to reiterate that the deposits in the occupied territories of Western Sahara are estimated to contain 14% of the world's phosphate reserve (Nasa, 2018).

2. 3. EU-Morocco phosphate trade.

After ascertaining the “criticality” of phosphate rock, the next step is to consider how this connects to EU_morocco phosphate trade. As previously noted, phosphate was designated as a critical raw material in 2014. Furthermore, several EU bodies have already highlighted how critical it is to guarantee a steady supply of phosphate (SCRREEN, 2020; Directorate General for Internal Policies, 2024).

But why is this the case?

- **Lack of domestic sources and overreliance on Moroccan phosphate imports.**

The European Union's reliance on Moroccan phosphate presents a complex and potentially problematic scenario. According to a 2024 report entitled “The dependency of the EU’s food system on inputs and their sources”, the Directorate General for Internal Policies pointed out the risks associated with overrelying on a limited number of external suppliers for the EU’s food system (Directorate General for Internal Policies, 2024). In that very same report, among other inputs, the Directorate General for Internal Policies highlighted the EU's reliance on phosphate imports and Morocco's role as the EU’s main phosphate supplier (SCRREEN, 2020; Directorate General for Internal Policies, 2024).

This dependence stems from the EU's lack of domestic phosphate sources, with the Siilinjärvi mine in Finland being the only operational mine within the EU, accounting for less than 17% of its phosphate needs (Kasprak, A., 2016; Grohol, M. & Veeh, C., 2023). As a result, the EU imports 82% of its phosphate.

The primary issue lies in the EU’s inability to easily replace Moroccan phosphate. The EU’s phosphate deposits are minimal, comprising only 0.8% of global reserves (European Commission e, n. d.; U.S. Department of the Interior, 2024). Hence, the EU resorts to trade and, in particular, imports in order to satisfy its phosphate demand (82% of its phosphate needs) (Grohol, M. & Veeh, C., 2023). In this regard, Morocco is the EU’s largest phosphate provider. Roughly 27% of all the phosphate the EU imports comes from Morocco. To this fact we must add that, from 2000 to 2021, 43% of

unground phosphates and 35% of ground phosphates imported into the EU came from Morocco (SCRREEN, 2020).

The EU has tried to diversify its phosphate supply. However, this has proven to be quite difficult. There are other big phosphate rock producers like China and the US, which respectively account for 44% and 10% of the world's production of this mineral respectively (Grohol, M. & Veeh, C., 2023). However, both countries primarily focus on meeting domestic demand and export very little phosphate (de Boer, M. A., 2018). On the other hand, turning to Russia, the EU's second-largest phosphate supplier, to lessen its dependence on Moroccan phosphate might also pose some challenges.. As previously stated, Russia accounts for roughly 23% of the EU's phosphate imports (Grohol, M. & Veeh, C., 2023). However, as a result of the Russian invasion of the Ukraine and the subsequent deterioration of diplomatic relations, the EU has tried to distance itself and reduce its dependence on Russia to minimize the latter's influence on the EU economy and avoid another "Nord-stream 2" scenario (European Commission, 2022).

Some news outlets in the EU such as Euronews and Euractiv, have hailed the supposed discovery of 70 billion tonnes of phosphate rock in Norway as a solution to the EU's dependence on Morocco (Simon, F. 2023; Wybrew, A., 2023). Regardless, it seems this news might have been taken out of proportion. In an interview for Nettavisen, one of Norway's most popular online newspapers, a community contact at Norge Mining (company responsible for the discovery of this deposit), stated that there's a big gap between the estimated size of the deposit and what can be profitably extracted (Gunnarson Bondevik, B., 2023). Proven reserves appear to be in actuality far smaller, amounting to 2 billion tonnes rather than the reported 70 billion tonnes. This number, (2 billion tonnes) is somehow close to the current EU phosphate deposit "quota" (1 billion tonnes) (U.S. Department of the Interior, 2024).

- **Depletion of smaller phosphate deposits.**

The overreliance on Moroccan phosphate becomes even more problematic when considering Morocco holds the largest phosphate reserves, accounting for 70% of the global share.

To make things worse, the EU's dependence on Moroccan phosphate might increase even further in the coming years. This is partly due to the rise in prices of natural and chemical fertilizers by 71.4% since 2020, which are the main alternative to phosphate rock and phosphate based fertilizers (Ali, A. & Dadush, U., 2023). To this we must add up the already mentioned straining of EU-Russia relations (European Commission, 2022). The EU is aiming to reduce the EU's economic links to Russia and could lead to Morocco taking on part of Russia's phosphate imports share.

Furthermore, smaller phosphate deposits around the world may deplete over time. To reiterate, Morocco holds some of the largest phosphate reserves globally, accounting for 70% of the total share, or approximately 50 billion tonnes (El Bamiki, R., et al., 2021; de Ridder et al., 2022; OECD, 2015). The second-largest reserves are found in China, which represents 4.5% of global phosphate reserves, or 3.8 billion tonnes (Liu, X., Zhang, Y., Cheng, M., Jiang, S., & Yuan, Z., 2023; U.S. Department of the Interior, 2024). Other significant phosphate reserves are in Egypt, with 2.8 billion tonnes; Tunisia, with 2.5 billion tonnes; Russia, with 2.4 billion tonnes; and Algeria, with 2.2 billion tonnes. Studies suggest that, by the end of this century, Morocco could account for more than half of global phosphate production due to the depletion of economically viable deposits in other regions over the next 50 to 100 years (Cordell, D. & White, S. B., 2011). For example, some studies suggest that countries like China, the largest global producer of phosphate and holder of the second-largest phosphate reserves, may experience regional supply shortages by 2050 (Liu, X., Zhang, Y., Cheng, M. et al 2023; Jiang, S., Hua, H., Sheng, H. et al, 2019).

The depletion of economically viable deposits around the globe will increase Morocco's dominant position (SCRREEN, 2020). In order to mitigate the geopolitical risks attached to a single country controlling the production and supply of phosphate rock, research is being undertaken regarding phosphorus recovery from wastewater and animal manures, as well as in the development of alternatives to phosphate-based products such as food conservatives, as previously mentioned. In this case, the EU has taken several steps to invest in more sustainable options around phosphate production and its use, addressing both supply chain vulnerabilities and environmental concerns. The EU has funded research projects under programs like Horizon 2020 and Horizon

Europe to develop sustainable phosphate production and recycling technologies, such as the EU funded P - REX, and PHOS4You projects (Egle, L., Rechberger, H., Krampe, J. & Zessner, M., 2016; Hukari, S., Hermann, L. & Nättorp, A., 2016; Soo, A. & Shon, H. K., 2024; Pap, S., Zhang, H., Bogdan, A. et al, 2023). Through the P-REX and PHOS4You projects, the EU aims to recover phosphate from waste streams, such as wastewater, sewage sludge, and animal manure, as part of its circular economy strategy. as well as recovering phosphate from waste and developing eco-friendly fertilizers. However, these initiatives find themselves at very early stages of development. Furthermore, concerning phosphate “end of life” recycling, the effective recycling rate of this mineral compound stands at 0% for chemical applications and 17% for fertilizer production (EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al, 2020).

- **Increase in the international demand for phosphate.**

These scenarios increase the EU’s dependence on Morocco, especially given that global demand for phosphate is growing due to population growth, economic development, and the rising need for food production, particularly in developing nations.

From 2019 to 2021, global phosphate demand grew by 7.0% (Brownlie, W. J., Sutton, M. A., Cordell, D. et al, 2023). As a finite resource, phosphate is increasingly subject to price hikes driven by rising global demand. This demand surge is partly fueled by the depletion of smaller, economically viable phosphate deposits worldwide, as well as the growing populations and economic development in emerging nations.

In this context, it's important to note that the rising population and GDP levels in developing nations, which are closely tied to increased food demand, could lead to a significant rise in phosphate consumption (Scholz, R. W., Wellmer, F. - W., Mew, M. & Steiner, G., 2025; de Jong, S., de Ridder, M., Lingemann, S., & Polchar, J., 2012; OECD, 2015). Food security is already a pressing issue in these countries, and rising population numbers will further strain their already overburdened food production systems.

Additionally, many developing nations, particularly in Africa, face the growing threat of surface water degradation and scarcity - a problem that will worsen with the impending climate crisis unless significant action is taken to address it. The use of phosphate-based

fertilizers and effective phosphorus management could help address the scarcity of usable surface water and mitigate food insecurity (Brownlie, W. J., Alexander, P., Cordell, D. et al, 2024).

The increase in global phosphate demand, paired with the depletion of other deposits around the globe, has the potential of increasing Morocco's importance as a phosphate supplier and producer. In turn, the EU will face increased competition in order to gain access to Moroccan phosphate, potentially reducing the amount of phosphate it is capable of purchasing and importing into its market.

- **Closing remarks.**

In light of the data presented in this chapter, the EU's growing reliance on Moroccan phosphate imports could make the Union vulnerable to supply disruptions, particularly if relations between the two actors were to deteriorate. Morocco's dominant position as the EU's main phosphate supplier gives her significant leverage over the EU, turning what has become a vital supply relationship into a potential point of contention.

As seen throughout this chapter, the EU is growing increasingly dependent on Moroccan phosphate for the functioning of key sectors of its industry. This dependency is exacerbated by the fact that the EU has limited domestic production capabilities and struggles to diversify its sources. Furthermore, global phosphate deposits are depleting, and demand continues to rise, primarily due to population growth and economic development in emerging economies. Consequently, the EU's ability to secure affordable and sufficient phosphate supplies may become even more challenging as competition for resources intensifies, leading to higher prices and potential shortages.

In this context, maintaining a stable and reliable relationship with Morocco is crucial for the EU. The political and economic significance of phosphate cannot be overstated, as supply disruptions could have a ripple effect on multiple industries within the EU. Should diplomatic relations between Morocco and the EU sour, Morocco could easily use the EU's reliance on its phosphate as a bargaining chip, leveraging it to exert political pressure over the Union.

It is important to note that there are already contemporary examples in which reliance on a small number of suppliers has been used against the EU. One prominent example is Russia's threats to restrict oil and gas supplies following the EU's sanctions as a result of the 2022 invasion of Ukraine. For context several central and eastern European countries, such as Germany, relied on Russia for a substantial portion of their natural gas and oil supplies (Rodríguez-Fernández, L., 2020; Eser, P. et al 2019). Russia sought to leverage this dependency in an attempt to erode the EU's support for Ukraine, threatening to halt gas and oil exports.

In this regard, it should be noted that Morocco has not made use of its phosphate in a comparable manner (that is, as a diplomatic tool), or at least not against the EU or its Member States (Reina, M. G., 2023; Faouzi, A., 2025; The African report, 2022; Souad-Anouar, 2022). Nevertheless, in light of the data presented so far, it should be noted that the EU's dependence on Moroccan phosphate exhibits some similarities with its reliance on Russian oil and gas prior to the 2022 invasion of Ukraine. Those similarities include a high level of market concentration, where supply and production of critical inputs are concentrated under a limited set of countries; limited opportunities for supply diversification; economic importance of the input in question for key sectors of the EU economy; challenges surrounding substitution; among other factors.

Taken together, these factors suggest that the EU's reliance on Moroccan phosphate may make it vulnerable to external pressure. While such a scenario remains purely hypothetical, we should not overlook the fact Morocco has reportedly used the dependence of countries such as Kenya, Peru or Guatemala on its phosphate resources as a diplomatic tool to influence their position on the Western Sahara (Reina, M. G., 2023; Faouzi, A., 2025; The African report, 2022; Souad-Anouar, 2022). However, it should be noted that Morocco has demonstrated its willingness to exploit the EU's reliance on other policy areas, notably migration, in order to advance its political agenda on the Western Sahara.

To reiterate, the scenarios highlighted above do not suggest that Morocco is weaponising phosphate trade against the EU, but rather that the existing structural conditions and dynamics surrounding phosphate trade could enable such a strategy.

In this sense, I would propose conducting a case study on the impact of phosphate trade on the ongoing conflict in the Western Sahara. Such an approach will allow for a deeper understanding of the dynamics, economic interests, geopolitical struggles, and human rights considerations present in the context of the conflict in the Western Sahara, as well as the broader context of EU -Morocco relations.

Part 3: The Conflict in Western Sahara. A case study for the influence of EU - Morocco trade.

3. 1. Problematization

To reiterate the point made throughout this Master's Mémoire, Moroccan phosphate is of the utmost importance for the EU. The EU is heavily dependent on Moroccan phosphate, something which is bound to increase in upcoming decades.

As previously stated, this makes the EU vulnerable to supply disruptions, a scenario that could very much take place if relations between the EU and Morocco were to worsen, let's say, because of the status of the Western Sahara.

Thus, the reason behind this case study. Studying this conflict could enable us to explore the EU's dependence on Moroccan phosphate, and how it interacts with other aspects of EU-Morocco relations such as democracy promotion, respect for human rights and international law. By focusing on the impact of the phosphate trade in this specific context, we can examine how the EU's economic reliance on Moroccan phosphate has influenced its diplomatic stance on Western Sahara, particularly regarding its reluctance to take strong actions or issue any kind of formal condemnation in response to human rights violations or breaches of international law in the Western Sahara.

However, before delving any deeper, a little bit of context is in order.

3. 2. Historical Context

The Western Sahara, a vast region situated along the Atlantic coast of northwest Africa, covers an area of 252,120 km² and is home to approximately 489,000 people. The region is bordered by the Atlantic Ocean to the west and northwest, Morocco to the north, Algeria to the northeast for a brief stretch, and Mauritania to the east and south (Encyclopedia Britannica, n.d.). Originally colonized by Spain in 1884, the Western

Sahara remained under Spanish rule until 1976 (Allan, J. et al., 2023; Besenyő, J., 2017). Spain consolidated its control over the territory in 1934, which formally became a Spanish province in 1958. Despite achieving provincial status, the region continued to be managed as a typical colonial possession, marked by the exploitation of its natural resources and the harsh treatment of the indigenous population, the Sahrawi people. The Spanish colonial regime was characterized by economic exploitation, political repression, and significant impoverishment of the local population (Zunes, S., & Mundy, J., 2022).

In response to growing calls for self-determination, particularly following the UN's 1966 resolution advocating for a referendum in the region, the Spanish dictator Francisco Franco proposed in 1973 granting the Western Sahara be granted autonomy within the Spanish territorial system - a proposal that was subsequently approved by a pro-Spanish Sahrawi assembly (Contini, D., 2019). This initiative aimed to quell rising nationalist sentiment among the Sahrawi people, as well as mounting pressure from the international community. However, it failed to prevent the outbreak of violence between Spain and the Front Polisario - main Sahrawi nationalist independentists movement -, in what came to be known as the Sahrawi insurgency, which lasted from 1973 to 1976 (Smith, J. J., 2015; Zunes, S., & Mundy, J., 2022).

Spain sought to maintain control over the territory, given the richness found in its subsoil (*id est.*, phosphate) and the strategic importance of the Western Sahara for trade with the Canary Islands and Africa. Not to mention the irredentists, pro-colonial fixations of the Spanish Army (Contini, D., 2019).

However, several factors made the Spanish position untenable. Foremost among them was mounting domestic pressure, driven in large by the dictator's declining health and the rise of pro-democracy movements within Spain (Contini, D., 2019). In addition, Spain faced growing pressure from international institutions to abandon and decolonize the territory (Contini, D., 2019). Finally, the Sahrawi insurgency led by the Front Polisario proved to be far more difficult to suppress than anticipated.

Faced with pressure from both Morocco and Mauritania, as well as the impossibility to maintain control over the territory, Spain agreed to the cession and partition of Western

Sahara between the two countries in 1976. This was formalized in the 1976 Madrid Accords (Zunes, S., & Mundy, J., 2022; Besenyő, J., 2017). This act officially marks the start of the conflict of Western Sahara, which continues to this day.

Currently, the majority of the territory of the Western Sahara is under Moroccan control. However, this claim is not recognized by the majority of the members of the international community/the United Nations (Sanasawal, K., & Kamath, R., 2020). As of now, Morocco controls approximately 66.6% of Western Sahara (Ferrer Lloret, J., 2022). It is important to note that Morocco's occupation of Western Sahara stands in violation of international law. The International Court of Justice (ICJ), in its advisory opinion on Western Sahara, rejected Morocco's claims over the territory (ICJ, n.d.). Additionally, the ICJ recognizes Western Sahara as a territory still awaiting decolonization, in line with the United Nations General Assembly Resolution 1514 on the Granting of Independence to Colonial Countries and Peoples, adopted in 1960.

Moreover, the Moroccan occupation of the territory, much like Spanish colonial rule before, has been marked by widespread political repression, allegations of torture, enforced disappearances, forced cultural assimilation and other serious human rights violations (Allan, J., 2023; Deubel, T. F., 2020). In addition to these abuses, the occupation has led to significant demographic shifts through ethnic displacement (Hernández, M. P., 2025). Today, the indigenous Sahrawi people constitute less than one-third of the population within Western Sahara, with more than half of the ethnic Sahrawis living in exile, primarily in refugee camps around Tindouf, Algeria.

3. 3. Phosphate in the Western Sahara.

Now, what is the role of phosphate trade in the conflict in Western Sahara?

In 1947, Spanish colonial authorities discovered sizable phosphate deposits 130 kilometres southeast of El Aaiún, in Bou Craa. This would lead to the creation of the “Empresa Nacional Minera del Sahara” (in English, National Mining Company of the Sahara) in July 1962, a public company charged with operating the mine. Later on, in 1968, the company was renamed “Fosfatos Bucraa S.A.” (Bucraa Phosphates Joint

Stock Company), more commonly known as Phosboucraa or Fos Bucraa. The mine started operating in 1972. It should be noted that the discovery of phosphates in Bou Craa constitutes the first source of mineral revenue of the colony.

As stated in the previous section, the discovery of phosphate (main phosphate rock deposit in Western Sahara), among other factors, gave rise to the emancipatory struggle between 1973 and 1976 against Spanish colonial rule in the Western Sahara (Smith, J. J., 2015; Zunes, S., & Mundy, J., 2022). Spain tried to maintain control over the territory but it relinquished its colony due to mounting domestic and international pressure.

However, although it had lost its last colonial possession, Spain managed to secure 35% of shares in the phosphate mine at Bou Craa, as some sort of compensation for granting the Western Sahara to Morocco (European Parliament, 2018; Contini, D., 2019). Spain would retain its shares until 2002, when it sold them to the OCP.

Furthermore, even the Moroccan annexation of the Western Sahara can be explained through a similar lens. According to the Moroccan state-owned company OCP Group, Saharawi phosphate rock mined in Bou Craa amounts to 2% of Morocco's total phosphate reserves or 4.6% of its total revenue, as well as around 8% of the total rock extracted (WSR, 2024; OCP, n. d.; OCP, 2018). Despite these claims, back in 2016, 22% of Morocco's phosphate rock exports departed from El Aaiún and most likely originated from the mine of BouCraa (OCP, 2018; Brownlie, W. J. & Sutton, M. A., 2022).

In essence, this could be just an attempt by Morocco at dismissing the economic and strategic importance of a territory it so much covets, presenting Sharawi reserves as insignificant. These numbers given by Morocco are disputed by local activists, among them Western Sahara Resource Watch, a pro Saharawii non governmental organization. According to this organization, just in 2022, Morocco exported phosphate rock from Western Sahara for a value of \$655.5 million (WSRW, 2023). Data from third actors such as NASA or the Middle East Institute hint towards phosphate production in Bou Craa mine accounting for 14% of global phosphate production and roughly 10% of Morocco's phosphate income (Kasprak, A., 2016; Nasa, 2018; Tanchum, M., 2022).

In this regard, the economic reasons behind Morocco's annexation of the Western Sahara can be summarized as follows:

- Taking over the Western Sahara solidifies Morocco's position as the biggest supplier of phosphate in the region and the world. The taking of the Western Sahara allows Morocco to gain access to yet another vast source of phosphate rock with which to complement and reinforce its existing reserves (Kasprak, A., 2016; Shelly, T., 2005). This allows Morocco to control the market and set global prices, almost nearing a dominant position.
- The occupation of the territories of the Western Sahara also prevents the emergence of a potential rival. As stated in the previous paragraphs, Sharawi reserves contribute 14% of global phosphate production and roughly account for 10% of Morocco's phosphate income (Kasprak, 2016; Nasa, 2018; Tanchum, M., 2022). Although lesser than Morocco's reserves, the phosphate deposits of a recognized independent Sahrawi Arab Democratic Republic would significantly reduce Morocco's market share, forcing the latter to compete and limiting its ability to influence the price of phosphate in the market (Kasprak, A., 2016; Shelly, T., 2005).

3. 4. The EU's involvement and the role of phosphate trade.

As previously stated, there is no "single EU democracy promotion model", as each EU institutional actor involved pursues its own interests in this context (Mouhib, L., 2014; Wetzel, A. & J. Orbie, 2011; Wallace, 2010). This is particularly the case in the Western Sahara, where competing EU interests have usually led to contradictory if not conflicting policies in regards. This can be observed between the EU Commission and the CJEU on the matter of the Western Sahara (Agence Europe, 2018; CJEU, 2021).

Furthermore, key EU actors appear to adopt positions that might "offend" the Moroccan government (Mouhib, L., 2014). As previously stated, the EU Delegation to Morocco opposed and effectively barred the implementation of a human rights initiative for the Western Sahara, fearful it might antagonize Morocco (Mouhib, L., 2014).

In order to explain this phenomenon, scholars usually point to the interest of the EU in maintaining good relations with Morocco, a necessary factor for the establishment of good economic relations and cooperation on matters such as security (Mouhib, L., 2014; Fernández-Molina, I. & Khakee, A., 2024). Something that, more often than not, lies in tension with the EU's stated principles of its external actions: human rights, democracy and international law.

In this regard, I argue that the EU's dependence and economic interests in Moroccan phosphate occupies a sensitive position within this context, as it offers a complementary explanation to the position of several key institutional actors in the conflict. It is difficult to discuss the impact of phosphate trade on the already mentioned DG DEVCO or the EU Delegation to Morocco, but it is worth considering how it interacts with the actions of institutional actors such as the EU Commission and the EU Parliament. But why these three actors? On top of data that links their actions with phosphate in the Western Sahara, they are some of the most salient institutional actors in the conflict:

First, the EU Commission holds a central position within this context for it is the primary actor responsible for negotiating EU agreements with Morocco, such as the EU-Morocco Association Agreement or the EU-Morocco fisheries Agreement, which have proven to have a direct impact in the politics surrounding the conflict in Western Sahara. Its repeated efforts to extend the scope of these agreements to the Western Sahara, despite the numerous CJEU's, makes the EU Commission an interesting study subject.

Second, the EU Parliament, while it lacks full control over external action, plays a key role by means of Parliamentary resolutions and consent votes on EU-Morocco agreements. In this regard, it is worth studying the EU's Parliament policy U-turn on the Western Sahara from 2011 onwards, from adopting a more pro-saharawi stance to going back on crucial votes such as the extension of the Morocco Association and EU-Morocco Fisheries Partnership agreements.

- **The EU Commission and the CJEU.**

Between 2016 and 2019, the EU Commission proposed an amendment to the EU-Morocco Association Agreement and its protocols, with the intention of extending the tariff preferences to products originating in Western Sahara (Agence Europe, 2019). The aim of these amendments was to extend the tariff preferential treatment applied to Moroccan goods to products originating from Western Sahara; which would be reclassified as being of Moroccan origin. A similar story took place during this very same period of time, with the EU-Morocco Fisheries Partnership Agreement (Agence Europe, 2018). The EU Commission proposed to amend its Fisheries Agreement with Morocco to encompass the coastal waters adjacent to the occupied territories of Western Sahara (Ryngaert, C. 2018; Suárez - Collado, Á., & Contini, D., 2021).

However, all these attempts were blocked by the CJEU (CJEU a, 2018; CJEU b, 2018; CJEU, 2021). Notably, in Case C-266/16 (Western Sahara Campaign UK, 2018) and Case C-363/18 (Front Polisario v. Council, 2021), the Court reaffirmed that the EU must strictly observe its unconditional obligations toward the Sahrawi people, in accordance with the principle of self-determination. In practical terms, this means that any agreement or amendment affecting Western Sahara -including those related to trade- must have the explicit consent of the Sahrawi people. This principle extends to all aspects of the EU's relations with Morocco (CJEU, 2021).

In particular, the Court emphasized the EU's duty to respect the distinct legal status of Western Sahara as an occupied territory pending decolonization, as established by United Nations General Assembly Resolution 1514 on the Granting of Independence to Colonial Countries and Peoples, and reaffirmed in Resolution 2229 (XXI) concerning the Question of Ifni and Spanish Sahara. In a similar manner, Advocate General Wathelet reiterated that extending the scope of this agreement to the waters of Western Sahara would violate the EU's obligations under international law (Advocate General Wathelet 2018). He underscored that any economic activity conducted in a non-autonomous and occupied territory - such as Western Sahara - on behalf of or in collaboration with the occupying power, in this case Morocco, would violate the right of the Sahrawi people to self-determination and the international obligation of

non-recognition of unlawful situations (Advocate General Wathelet 2018; CJEU b, 2018).

Moreover, through these rulings, the CJEU firmly established that the territories of Western Sahara cannot be included within the scope of the EU's trade agreements with Morocco (CJEU a, 2018; CJEU b, 2018 CJEU, 2021). Thus, the EU, its Member States, and private companies operating within their jurisdictions, are barred from partaking in any activity or undertaking that would contribute to the economic exploitation of the natural resources of Western Sahara. Doing so would not only contravene international law but legitimize Morocco's illegal occupation of these territories. This means that food products like tomatoes or fish that come from Western Sahara cannot be sold as Moroccan; that phosphate mined at Bou Craa cannot be marketed under the label of Moroccan origin etc.

In a similar vein, the Court, in its Joined Cases C-779/21 P and C-799/21 P, upheld its previous rulings, reaffirming that any extension of the EU-Morocco Association Agreement to the territories of Western Sahara would be incompatible with the EU's obligations under international law (CJEU, 2024). Specifically, the Court cited the United Nations General Assembly Resolution 1514, Resolution 2229, as well as the International Covenant on Civil and Political Rights and the International Covenant on Economic, Social and Cultural Rights, all of which recognize the right to self-determination and prohibit the exploitation of resources from non-self-governing territories without the consent of their peoples.

Despite all of this, the EU Commission tried to circumvent this “hurdle”, carrying out a series of consultations with stakeholders in the Western Sahara, in an attempt to include the Western Sahara in the aforementioned deals (Fernández-Molina, I. & Khakee, A., 2024; European Commission, 2023). The goal of these surveys was to fulfill the CJEU criteria pointed in previous paragraphs (*id est*, consent of the Saharawi people).

However, I would like to point out that these studies tended to mix the concept “local” with “Saharawi”, which in practical terms omits the fact that ethnic saharawis have become a minority in the Western Sahara (Fernández-Molina, I. & Khakee, A., 2024; European Commission, 2023; Hernández, M. P., 2025). Furthermore, the scope of these

studies only encompassed Moroccan held territory. These studies/consultations contained no survey carried out in areas under the authority of the Polisario Front nor in the Saharawi Camps in Algeria, where most of ethnic Saharawis live in exile (Hernández, M. P., 2025).

In this regard, the EU Commission's repeated efforts to extend the scope of the EU-Morocco Association Agreement to the territories of Western Sahara - despite the numerous CJEU's rulings on the matter - suggest a tacit recognition of Morocco's claims over the occupied region, or at the very least, a certain willingness to accommodate them. This is further reinforced by the actions of key Member States, such as Spain and France, which have openly endorsed Morocco's autonomy plan for the Western Sahara (Booty, N., 2024; Diffley, A., 2024). Thus, de facto legitimizing its annexation into Morocco proper.

When it comes to explaining the EU Commission's position on the Western Sahara, scholars generally emphasize the EU Commission's interests in preserving domestic stability in an unpredictable neighbourhood, Morocco's role in migration containment, anti-terrorism, and other security matters, as well as the EU's economic interests in the region (Fernández-Molina, I. & Khakee, A., 2024).

However, activists and various NGOs also link the EU Commission's stance on the Western Sahara to existing economic interests in the region (citar wsrw y Lavvat, H.).

As previously stated, phosphate extracted in the Western Sahara accounts for roughly 14% of global phosphate production (Kasprak, A., 2016; Nasa, 2018; Tanchum, M., 2022). But how many of that phosphate reaches the EU?

According to the EU Commission, the amount of phosphate imported into the EU or whether such a thing still takes place nowadays remains unknown (European Commission, 2023). It is important to note that there are no phosphate processing plants in the Western Sahara. However, it is possible that phosphate mined in the Western Sahara is transported to processing facilities in Morocco proper, where it undergoes further transformation into phosphate derivatives before being exported to the EU (European Commission, 2023). Since the final substantial economic transformation of the phosphate takes place within Morocco proper, these products would meet the

criteria to be considered as Moroccan under the EU - Morocco Association Agreement. Thus, the restrictions stemming from the Case C-266/16 (Western Sahara Campaign UK, 2018) and Case C-363/18 (Front Polisario v. Council, 2021) would not apply to these products.

It should be noted that this later statement is but an hypothesis put forward by the EU Commission. To reiterate, though phosphate production is a major industry in the Western Sahara, there are no exports of Western Saharan phosphate to the EU (European Commission, 2023). Furthermore, no processed phosphate products are produced in the Western Sahara. Nevertheless the EU Commission infers the possibility that raw phosphate mined in the Western Sahara may be transported to Morocco, where it undergoes further processing, it is branded as a Moroccan product and it is exported as such to the EU “*under preferential conditions*” (European Commission, 2023).

However, there have been several documented instances where phosphate extracted from Western Sahara has entered the EU market. In June 2014, Western Sahara Resource Watch published a report identifying companies that sourced phosphate from Western Sahara, among them Lifosa, a Lithuanian fertilizer producer (WSRW, 2015). In 2016, Lifosa was found to have imported phosphate originating from the territory (Ancevicè, M., 2016; WSRW, 2015). A similar incident occurred in 2021, when EuroChem Group, Lifosa’s parent company, offloaded a shipment of Western Saharan phosphate at its port facilities in Estonia (Laine, M., 2021; WSRW, 2021).

This phenomenon extends beyond mere trade flows and the import of phosphate and its derivatives. It also encompasses the economic interests of several EU - based companies active in the territory. These companies supply essential materials and equipment to the OCP to support its mining operations in Bou Craa. Additionally, EU firms have been involved in the construction of phosphate export infrastructure at the port of El Aaiun (WSRW 2024; WSRW, 2023; ECCHR, 2019; ECCHR, n. d.).

Among these companies are Siemens Gamesa (now Siemens Energy), Vinci S. A., Epiroc, Azura group, Golden Ocean Group Limited, Archirodon Group NV, among others; though several of the aforementioned companies have since withdrawn or scaled back its involvement with the OCP Group at Bou Craa (WSRW 2024; WSRW, 2023).

Siemens Gamesa reportedly provides around 95% of the electricity required for mining operations at Bou Craa. In a similar fashion, Vinci S.A., through its subsidiary Cegelcec, also supplies energy to Phosboucraa. Furthermore, in 2022, Archirodon Group NV, a Greek company based in the Netherlands, was contracted by the OCP Group to construct and expand phosphate export facilities at the port of El Aaiun (WSRW, 2022). Another EU based company, THYSSENKRUPP was contracted by the OCP Group to refurbish various sets of machinery at the Bou Craa site (WSRW, 2023).

Additionally, several EU based logistics and shipping companies have been reported to provide services to the OCP Group in connection with phosphate shipments originating from the Western Sahara. Mainly, Sword Shipping BW (Netherlands), Valovine LLC (Croatia), Marylaki Shipping Co. (Greece), Akour Shipping S. A. (Greece), to name a few (WSRW, 2023).

It is important to note, however, that the claim that the EU Commission's stance on the Western Sahara is partly driven by vested interest in the territory's phosphate industry originates primarily from activists and NGOs, most notably Western Sahara Resource Watch. In this regard, while several major EU companies are involved in the sector (*id est*, Siemens Energy and THYSSENKRUPP, among others), the existence of a direct link between these interests and the EU Commission's position on the conflict remain contested.

That being said, it should be noted that the EU Commission has faced criticism from several Members of the European Parliament regarding its stance on the Western Sahara, with some suggesting that similar economic considerations may have influenced the EU Commission's actions in the past.⁸

In this regard, the information outlined above prompted a parliamentary question to the EU Commission in 2023. Two Members of the European Parliament inquired whether the EU Commission intended to comply with the CJEU rulings on the matter of Western Sahara and whether it planned to extend the scope of the EU Conflict Minerals Regulation to cover phosphate originating from Western Sahara. This regulation aims to

⁸ Though such statement refers to the debate surrounding the "Commission Delegated Regulation amending Delegated Regulation (EU) 2023/2429 as regards origin labelling for fruit and vegetables originating in the non-selfgoverning territory of Western Sahara, it helps to exemplify wider criticism directed towards the EU Commission for allegedly prioritizing EU economic interests at the expense of the EU's obligations under international and EU law.

prevent the import and trade of minerals from conflict-affected and high-risk areas, specifically tin, tantalum, tungsten, their ores, and gold (Regulation (EU) 2017/821), which are considered to fuel armed conflict in certain regions.

Although the alleged connection between the EU Commission's position and the existence of economic interests surrounding phosphate mining in the Western Sahara is mainly pushed by pro Saharawi civil society actors and NGOs, it should not be dismissed as merely speculative and/or marginal. This is particularly relevant given the involvement of key industrial actors within the EU economic, such as Siemens Energy or Thyssenkrupp, and in light of the fact that phosphate originating from the Western Sharan falls outside the scope of the aforementioned Conflict Minerals Regulation, which for practical purposes, facilitates the continued involvement of said companies in the sector.

In this sense, considering the Regulation (EU) 2017/821 objectives, it is arguable that phosphate rock extracted in the Western Sahara could very well fall within its scope of application.

For starters, Morocco's control over the mine of Bou Craa is regarded as illegal under international law. It has been documented that one of the motives behind Morocco invasion of the Western Sahara was to secure control over the phosphate deposits of the territory (Kasprak, A., 2016; Shelly, T., 2005). This situation is exacerbated by Morocco's extensive record of human rights violations in the region.

Furthermore, the Regulation (EU) 2017/821 contains various clauses that lend support to this argument. For instance, article 2, section f, defines "conflict affected and high-risk areas" as regions experiencing armed conflict or fragile post-conflict situations, as well as areas subjected to widespread and systematic violations of international law, including human rights abuses.

When pegged against this definition, the Western Sahara - recognized as a non self governing territory pending of decolonization under international law, currently embroiled in a semi-frozen conflict - would appear to meet such a criteria.

Nevertheless, as pointed out by certain Members of the European Parliament, phosphate rock mined in the Western Sahara remains outside the scope of application of Regulation (EU) 2017/821. To reiterate once more, the EU Commission was asked in 2023 whether it intended to review the scope of the Conflict Mineral Regulation so as to include phosphate rock mined in the Western Sahara, to which the EU Commission answered:

“The Commission is bound to review the functioning and effectiveness of the Conflict Minerals Regulation by 2023 and every three years thereafter. However, the Commission does not expect that this first review will lead to definite conclusions with respect to the minerals scope”.⁹

- **The EU Parliament.**

Since 1979, the European Parliament has debated and issued various non-legislative resolutions on the Western Sahara concerning a peace process for the territory and human rights, for the most part (Fernández-Molina, I. & Khakee, A., 2024). Most of these declarations could be considered as having “favoured” the “pro - Saharawi camp”; like the 2010 resolution condemning the violent dismantling of the Sahrawi protest camp in Gdeim Izik (European Parliament, 2010, Fernández-Molina, I. & Khakee, A., 2024). Furthermore, in 2011, the European parliament voted against the extension of EU - Morocco fisheries partnership agreement, which also encompassed the waters of the Western Sahara.

However, from 2012 onwards we can observe a shift in the EU Parliament’s position. In 2012, the EU Parliament consented to the EU-Morocco agricultural trade agreement, which in practical terms categorized products originating from the Western Sahara as Moroccan (Fernández-Molina, I. & Khakee, A., 2024). Later on, in 2013, the European Parliament went back on its 2011 vote and consented to the extension of the Morocco Fisheries Partnership Agreement to the waters of the Western Sahara. Once again, these treaties were blocked by the CJEU. However, that did not stop the EU Parliament from

⁹ At the time of writing of this Master’s Mémoire, the Conflict Mineral Regulation does not include phosphate rock mined in the Western Sahara, nor has any proposal has been tabled or is under consideration to extend the scope of the Regulations so as to cover the aforementioned mineral compound.

casting in 2019, yet again, two consecutive consenting votes on a renegotiated version of these agreements (Fernández-Molina, I. & Khakee, A., 2024).

Nevertheless, the CJEU once again blocked these attempts citing that the Western Sahara has a separate and distinct status from Morocco. Thus, any treaties of this kind must count with the consent of the Saharawi People (CJEU, 2021).

In this regard, the EU Parliament's policy U-turn is widely attributed to Moroccan lobbying (Fernández-Molina, I. & Khakee, A., 2024).

Morocco has availed itself of this kind of practice with the purpose of influencing the EU, as well as its bodies and institutions, on the question of the Status of the Western Sahara.

A clear example of this phenomenon can be found in the political crisis that ensued as a result of the "Qatargate - Marocgate" incident in 2022. In this regard, it should be noted that Morocco allegedly "bought" several Members of the European Parliament and other EU officials to further its interests regarding the Western Sahara (Hofmann, P., 2022; Costa, O., 2024; Fernández-Molina, I. & Khakee, A., 2024). In 2022, former Belgian Justice Minister Vincent Van Quickenborne linked this case of corruption with "fishing rights"- as in the extension of the EU-Moroccan fisheries partnership agreement to Western Saharan waters (Fernández-Molina, I. & Khakee, A., 2024; Costa, O., 2024; Bencharif, S.-T., 2022).

Regardless of the outcome of said investigations, the "Qatargate-Marocgate" scandal brought to light Morocco's lobbying in the EU, mainly through pressure groups such as the informal EU-Morocco Friendship Group (Fernández-Molina, I. & Khakee, A., 2024). Created in 2011, the EU-Morocco Friendship Group attempted to informally influence the EU in matters related to the Western Sahara in favour of Rabat. This can be seen in the various letters sent by the group to the then EU's High Representative for Foreign Affairs and Security Policy Federica Mogherini.¹⁰

¹⁰ Said letters were posted on the group's website but their respective entries have since been deleted and are only accessible through an online archive. To that effect:
<https://web.archive.org/web/20221010214301/https://groupedamitieumaroc.wordpress.com/>

Moreover, though not constituent of criminal misdemeanor, several Members of the EU Parliament reported having received gifts and free trips from Morocco from 2019 and 2024. The aforementioned trips allegedly matched key dates such as UN Security Council votes on the Western Sahara and the CJEU rulings on the extension of EU - Morocco agreements (Fernández-Molina, I. & Khakee, A., 2024).

This phenomenon can also be studied from the lenses of phosphate trade and its associated economic and political implications.

As previously stated, there are several companies that supply the OCP Group with essential materials and equipment to support its mining operations in Bou Craa and related infrastructures, including the port of El Aaiun (WSRW 2024; ECCHR, 2019; ECCHR, n. d.).

Beyond industrial and infrastructure support, several legal firms are involved with the OCP Group at the Bou Craa mine. Such is the case of KPMG, a law firm based in the Netherlands, and Palacio and Asociados, based in Spain (Guy, C., 2024; WSRW, 2023). Notably, Palacio y Asociados was hired to provide legal counsel to the OCP Group in relation to the trade of phosphate mined in the Western Sahara, so as to circumvent the legal hurdles surrounding the export of this mineral compound. The firm is headed by Ana Placio, former Spanish Minister of Foreign Affairs and former Member European Parliament, who also serves on the OCP Group international advisory board (Guy, C., 2024; WSRW, 2023).

In this context, the combination of both vested economic interests among several EU based companies in the exploitation of Western Saharan phosphate and connections with important political figures in Europe could make the EU vulnerable to lobbying, shaping or even constraining decision making in this context.

This dynamic can be observed in the letter sent in 2022 by Archirodon Group NV to Spanish Members of the European Parliament.

Back in September 2022, the company Archirodon Group NV, a Greek company based in the Netherlands, sent a letter to Spanish Members of the European Parliament in an attempt to influence their stance over the Western Sahara (WSRW, 2022; Archirodon

Group NV, 2022). Archirodon Group NV was contracted by Phosboucraa to construct a new phosphate-export port in El Aaiún, the capital city of the occupied Western Sahara. In its letter, Archirodon GROUP NV urged members of the European parliament to vote against several amendments to the Resolution on the “Renewed Partnership with the Southern Neighbourhood: a new agenda for the Mediterranean”, arguing that, if approved, these amendments would negatively affect Morocco’s relation with EU based companies with vested interest in the region (WSRW, 2022; Archirodon Group NV 2022). One of the proposed amendments called for the EU to uphold and respect UN Resolutions and EU Court Rulings on Western Sahara (WSRW, 2022; European Parliament, 2022). This would result in a broad ban to investing in the territory in any shape of form, including trade in phosphate, collaboration with OCP and Moroccan authorities on phosphate-related infrastructure projects (e.g., export ports and hubs), and similar activities (WSRW, 2022; European Parliament, 2022). It should be noted that these amendments were rejected by the EU Parliament.

3. 5. Analytic remarks.

To reiterate, the EU has adopted a rather ambivalent position as it pertains to the conflict on the Western Sahara. This is a result of the multipolar nature of the EU’s external action. The different, competing interests of the EU institutions and bodies in the region, lead to incohesive and contradictory policies/actions, and even conflict: - as exemplified by the numerous clashes between the EU Commission and the CJEU.

Nevertheless, institutional actors such as the EU Commission, despite the limitations imposed by the CJEU, appear to *de facto* recognize Morocco’s sovereignty over the territory, in detriment of the EU’s commitments to human rights and international law. In this very same vein, a growing number of EU Member States and EU officials have started to endorse Morocco's autonomy plans for the Western Sahara, hailing it as a “realistic” and “credible” solution to the conflict. They often cite support among the local population in Western Sahara, yet they neglect to acknowledge that the local population of the region is comprised in its vast majority by Moroccan settlers, that more than half of all ethnic Shrawis have been displaced from their homes and currently

live in refugee camps in Argelia, that Moroccan occupation of the Western Shara is marked by political repression, abductions and torture, etc (Allan, J., 2023; Deubel, T. F., 2020; Hernández, M. P., 2025).

As previously stated, scholars link this phenomenon to the EU's aim to maintain good relations with Morocco, a key partner in areas such as security cooperation, antit-terrorism and migration/border cooperation. Bilateral cooperation in these areas is contingent on maintaining good relations with Morocco. Thus, the EU refrains from taking any action that might antagonize Morocco as it pertains to the Western Sahara.

However, alongside these explanations, the EU's economic interest in phosphate trade and the region's reserves may have had a role to play in the conflict.

While it cannot be considered the sole driver of EU policy in the region, the data showcased above suggests the existence of a potential link between the actions of several EU institutional actors and phosphate trade.

In this regard, we should consider the interests of several EU based companies in the territory's phosphate mining sector or the collusion of EU based law firms and important political figures in the sector. Not to mention the documented accounts of lobbying directly involving phosphate related interests in the region, as seen in the aforementioned Archidorono GROUP NV's 2022 letter to several Members of the European Parliament. To reiterate, advocacy groups such as the Western Sahara Resource Watch claim this letter contributed to the rejection of two amendments to the Resolution on the "Renewed Partnership with the Southern Neighbourhood: a new agenda for the Mediterranean", which would have hindered the interests of EU companies in the Western Sahara.

Taken together, these examples suggest that phosphate mining, although its precise influence remains difficult to isolate, constitutes a relevant factor shaping EU policy in the region, contributing to, and possibly reinforcing, the role of more traditional drivers such as migration control and security cooperation within the context of the conflict in the Western Sahara.

Conclusion.

To conclude, the data presented throughout this dissertation highlights the existence of a fundamentally unbalanced relationship. Phosphate is a strategic resource for the EU, and securing a stable and uninterrupted supply is of critical importance. This is particularly true in the case of Moroccan phosphate, as the latter is the main supplier of this mineral compound to the EU and it is bound to increase its influence in the phosphate market in the coming decades. In this very same vein, I would argue that the need to secure phosphate supplies from Morocco .

While Morocco has not deployed phosphate as a coercive diplomatic tool against the EU, the Union's growing dependence on Moroccan phosphate limits the EU's negotiating power in diplomatic and trade discussions with Morocco. This statement should be interpreted in light of Morocco's prior record of exploiting the dependence of commercial partners on its phosphate resources in order to advance its political agenda, as illustrated by the cases of Peru, Kenya or Guatemala.

In any case, I argue that the EU's dependence on Moroccan phosphate should be considered as a structural/economic factor that helps to contextualize the framing of diplomatic relations between the two actors, especially concerning the conflict in the Western Sahara.

For starters, as discussed in chapter 3, there is the EU's growing dependence on Moroccan phosphate.

As stated time and time again throughout this Master's Mémoire, the EU is growing increasingly reliant on Moroccan phosphate. To reiterate, Morocco is the biggest importer of phosphate to the EU. Roughly 27% of all the phosphate the EU imports comes from Morocco. To this fact we must add that, from 2000 to 2021, 43% of unground phosphates and 35% of ground phosphates imported into the EU came as well from Morocco .

This is further exacerbated by the fact that there are not that many alternatives to Moroccan phosphate, the worsening of diplomatic relations with Russia (the EU's second largest phosphate supplier), the fact that Morocco might become the dominant

player in the phosphate market as a result of the depletion of economically viable deposits within half a century, among other factors. Thus, maintaining good relations with Morocco is of the essence.

If the EU were to sanction Morocco for its occupation of Western Sahara, the latter would find itself in a position where it could weaponize the EU's dependence on Moroccan phosphate against it. Such a move would have significant repercussions for the European economy, ultimately eroding the EU's phosphate security (de Jong, S. et al., 2012).

The most immediate consequence of being cut off from Moroccan phosphate would be a sharp increase in prices of phosphate and its derivatives, accompanied by widespread scarcity. It should be noted that something similar happened when Russia halted its phosphate supply to the EU as retaliation for the latter's support for Ukraine and sanctions imposed onto the Russian economy as a result of the 2022 invasion.

In this sense, EU companies heavily reliant on Moroccan phosphate could face phosphate shortages, increased costs, and operational challenges. This would also impact the development of green technologies, the defense sector, and digitalization (Bobba, S., Carrara, S., Huisman, J., Mathieux, F. & Pavel, C., 2020; EL Latunussa, C., Georgitzikis, K., Torres de Matos, C. et al 2020; Grohol, M. & Veeh, C., 2023). As highlighted earlier in this *mémoire*, phosphate rock and its derivatives - particularly phosphoric acid - are critical for producing solar panels, batteries, explosives, microchips, and more.

The EU's dependence on Moroccan phosphate also poses a significant risk to its agricultural sector. As stated in previous sections, phosphate is a critical component of fertilizers used in EU agriculture (Grohol, M. & Veeh, C., 2023; Thangavelu, K. P., Kerry, J. P., Tiwari, B. et al, 2019; Bontempi, E., 2017). Disruptions in phosphate supply would likely lead to lower crop yields, reduced food production, and increased food prices. Additionally, disruptions could compromise food security within the EU (Kasprak, A., 2016). As previously stated, the EU is not entirely self-sufficient when it comes to food production due to its dependence on phosphate rock imports. These imports are essential for the production of fertilizers, food additives and preservatives

(Udo De Haes et al., 2009, Kasprak, A., 2016; OECD, 2015; Thangavelu, K. P., Kerry, J. P., Tiwari, B. et al, 2019). Any disruption of the supply chain would undermine the production of additives and preservatives necessary for food production (food treatment, health measures, shelf life, etc), which in turn could limit, if not jeopardize food security in the EU (Kasprak, A., 2016).

To this fact, we must add the aforementioned vested interest of several EU based companies and instances of lobbying surrounding phosphate mining in the Western Sahara.

In this regard, the EU should not be considered a passive actor subject to Moroccan leverage, but rather a rational and willing participant in the economic exploitation of the Western Sahara. Be it through regulatory accommodation, lobbying or the tolerance of corporate interests operating in the Western Sahara, the EU actively participates, and benefits, from the exploitation of phosphate resources in the occupied territories.

In this respect, the EU's dependence on Moroccan phosphate does not merely have the capacity to limit its diplomatic autonomy. In the context of the Western Sahara, it implicates the EU in the perpetuation of Morocco's colonial project in the region and the pillaging of its natural resources, among them phosphate.

That being said, this phenomenon should not be understood as the sole determining factor shaping EU-Morocco relations. Instead, it constitutes one among many factors, the likes of migration and security cooperation, that shape diplomatic relations between both actors. All these factors reinforce and complement one another, creating a pattern of interdependence within the border context of EU-Morocco relations.

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