

Morocco

Trilemma Rank
73

Trilemma Score
62.8

Balance Grade
DBC

Morocco has improved its performance across all three Trilemma dimensions in the last decade, thanks to a strong commitment to diversifying its energy sources, the deployment of utility-scale renewable energy, and a regulatory framework, all of which have contributed to higher scores for Energy Security, Equity and Sustainability. For the first time, Morocco became an electricity exporter due to excess capacity but this was due to higher production from coal-fired power plants, which will dent its sustainability record. Morocco scores very well on access to electricity and clean cooking. It has done away with most energy subsidies except LPG, which is used for cooking and is still subject to price controls. Morocco gets a balance grade of DBC and its global rank is 73.

Population
35.7 (millions)

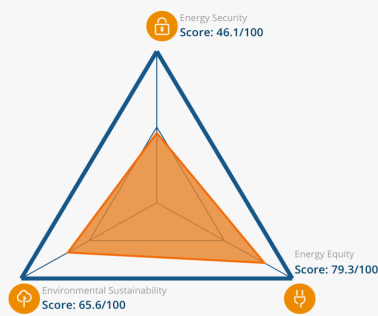
Land Area
446.3 (thousand sq. km)

GDP Per Capita
3,238 (PPP US\$)

Industrial Sector
25.9 (% of GDP)

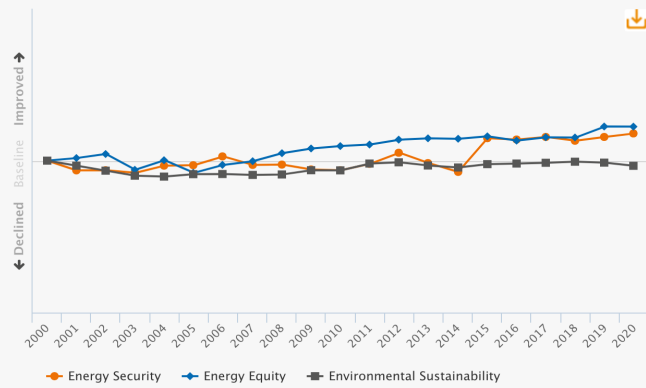
GDP Growth
3.0 (annual %)

Balance



Historical Trilemma Scores

Trend lines track the country's performance in each dimension, beginning with a baseline of 100 in the year of 2000



Trends and Outlook

Morocco has been a leader in North Africa in the deployment of renewable energy, mainly utility-scale solar energy. However, it remains heavily dependent on fossil fuel imports for over 90% of its energy needs. Coal is the dominant fuel in power generation and the excess electricity generated in recent weeks, partly due to lower demand as a result of COVID-19, allowed Morocco to turn electricity exporter in 2020 with exports to Spain and Algeria.

Morocco has a string of renewable energy projects and a regulatory framework that has encouraged private investment and drawn support from international financial institutions. It currently has 3.7GW of renewable energy generation capacity but coal remains the dominant fuel in power generation, accounting for over 60% of the generation mix in 2019. Much of the coal is imported as are oil products and natural gas. It has long considered importing LNG but the plan was delayed as the government debated whether to build a permanent or floating receiving terminal, the latter being an option pending the expansion of renewables capacity from a number of ongoing projects. The award of a contract for construction of a micro-LNG plant to be fed by gas from the Tendara concession is now on hold due to the COVID-19 pandemic.

Morocco is home to one of the world's largest concentrated solar power plants at Ouarzazate and further projects are set to lead to a higher percentage of renewables in the energy mix, both utility-scale and off-grid. Energy efficiency has been a priority for the Moroccan government but measures such as the strict application of new building codes and stricter fuel standards for cars have not been implemented fully. In the Energy Equity dimension, Morocco has made great strides in recent decades to provide 100% electricity access to modern electricity but while clean cooking facilities are widely available in urban centres where butane is used widely, many households in rural areas still rely on firewood, which is harmful to both environment and health.

Barring any delays caused by the COVID-19 pandemic, Morocco is on track to attain its renewable energy target of 42% by the end of 2020 and has raised its target for 2030 to 52% with most of the capacity to be from solar projects and some wind and hydropower.

Key metrics

Metrics are determined relative to other countries, with a full bar representing a score of 100.

