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MOROCCAN WATER SECTOR

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KUOPIO



North Savo
Regional Council

Moroccan water sector 2026:

Current situation, water politics and business opportunities

This report was prepared by Hanane Soussan as a part of the KuVe-project.



KuVe - Leveraging Kuopio water expertise to promote international visibility and catalyse business

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1. Overview of current situation of Moroccan water sector

Morocco, faced with seven consecutive years of drought, is relying heavily on seawater desalination to secure its water supply. The country aims to provide 60% of its drinking water from treated seawater by 2030, compared to 25% currently, according to its Minister of Equipment and Water.

Morocco is entering a new phase of its water policy with the 2026 Finance Bill, which focuses on strengthening infrastructure, expanding desalination capacity, and reinforcing sector governance. The largest desalination plant, requiring an investment of about €950 million, will be located near Tiznit in the south. It will have a capacity of 350 million cubic meters and will supply both urban centers in the country's "breadbasket" region and surrounding agricultural land. In addition to the northern cities of Nador and Tangier, new plants are planned in Rabat in partnership with the French group Veolia, as well as in Tantan, where the government is considering the construction of a port dedicated to exporting green hydrogen and ammonia.

Morocco currently operates 156 large dams with a total storage capacity of 20.8 billion m³. In 2025, the Rhiss dam in Al Hoceïma, with a capacity of 93 million m³, was commissioned. Three additional dams Koudiat Borna, Béni Azimane, and Sidi Abbou will add a combined 256 million m³. Construction is ongoing on twelve more dams representing 4.55 billion m³ of additional capacity, and two new dams are scheduled for 2026.

The Sebou–Bouregreg interconnection project will continue, enabling the transfer of 15 m³/s of water to the Rabat–Casablanca area at a cost of €570 million. Other interregional transfers are under study, including links between Oued Laou–Larache, Loukkos, and Oum Er-Rbia, which could mobilize around 1 billion m³ of water previously lost to the sea.

The national desalination roadmap targets the mobilization of 1.7 billion m³ per year by 2030. Desalination is expected to cover more than half of Morocco's drinking water needs while also supporting agricultural irrigation. Major projects are planned in Greater Casablanca, the Oriental region, Tangier, Souss-Massa, Rabat, and Dakhla, largely financed through public–private partnerships.

Efforts to modernize irrigation and strengthen rural resilience are ongoing. By 2024, 274,498 hectares had been equipped with localized irrigation, bringing the total modernized area since 2020 to 867,000 hectares. Collective irrigation networks were rehabilitated over 48,000 hectares, with another 42,000 hectares under development. Two large-scale projects represent 60,000 hectares: the Saïss project (30,000 ha), where the first 10,000 hectares are completed and the remaining 20,000 hectares are 81% advanced, and the Southeast Gharb project (30,000 ha), included in the 2026 Finance Bill and financed through an agreement with JICA, scheduled to begin next year.

Under the 2020–2027 National Program for Drinking Water Supply and Irrigation (PNAEPI), rural drinking water supply benefits from a total budget of €2.7 billion, including €410 million for 2022–2024. In 2025 alone, 70 rural centers and 10,428 villages were connected to drinking water.

Demand management is also advancing, with reservoir autonomy projects and network efficiency improvements aiming to achieve a national network efficiency rate of 78% by 2027.

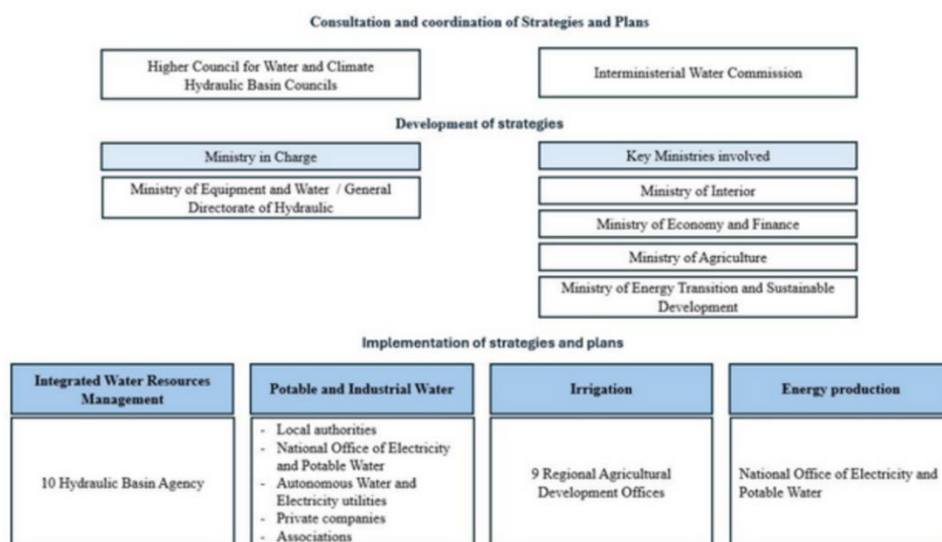
For 2026, €125 million is allocated to new projects under the National Sanitation Program (PNAM), with a focus on sustainability and resource recovery. By the end of 2024, the urban sanitation connection rate reached 84%, while wastewater treatment coverage stood at 58%.

Morocco operates 206 wastewater treatment plants, including eight marine outfalls, serving 475 cities and centers. The volume of reused water reaches 52.6 million m³, of which 20.5 million m³ is used for golf course irrigation.

Overall, these measures reflect Morocco's strategy to secure water resources, modernize infrastructure, and promote sustainable and equitable water management in the face of growing climate pressures.

2. The Moroccan institutional framework

Water Sector Governance in Morocco:



Source: General Directorate of Hydraulic, 2023; translated in English by author

2.1. The Ministries

During the 1990s, the management of the water sector in Morocco was under the responsibility of the Ministry of Equipment. Starting in 2002, this responsibility was gradually reorganized: it was first entrusted to a Secretariat of State for Water, then transformed into a Department of Water in 2013, before being placed under various ministerial authorities over time. In the current term, the sector has once again been attached to the Ministry of Equipment.

Although this ministry is officially responsible for water, many other ministries and public bodies are also involved in its management, each according to its own mandates. These include the Ministries of Interior, Agriculture, Industry, Energy Transition, Territorial Planning, Finance, and Health.

As a result, water governance in Morocco is multisectoral and decentralized, involving several actors at both national and local levels. In the event of governance reform, all ministries would need to be involved, as water is considered a collective responsibility, with a potentially important role for the ministry in charge of Digital Transition and Administrative Reform.

2.1.1. Ministry of Equipment and Water

The Ministry of Equipment and Water is responsible for the integrated management of water resources, addressing both quantitative and qualitative aspects. Its main duties include:

- research and assessment of surface and groundwater resources.
- monitoring water quality.
- planning and management of water resources.
- construction, maintenance, and operation of hydraulic infrastructure.
- development of hydraulic works to combat drought and floods.
- research and development in the fields of climate and water.
- meteorological monitoring and climate information.

Since 2002, some responsibilities have been delegated to regional directorates to strengthen local management.

By 2050, water needs are expected to increase significantly due to demographic growth, urbanization, and climate change. To meet these challenges, Morocco is relying on:

- the development of conventional resources (mainly dam construction);
- seawater desalination.
- reuse of treated wastewater.
- water conservation, especially in agriculture.
- protection measures for water resources and natural risk management.

The main strategic frameworks for water management in Morocco are the National Water Plan (PNE) 2020–2050 and the National Priority Program for Drinking Water Supply and Irrigation (PNAEPI) 2020–2027. The PNE sets the long-term roadmap for securing water resources through

dam construction, desalination, basin interconnection, improved access to drinking water, sustainable agriculture, and ecosystem protection, with an estimated budget of 32.6 billion euros. The PNAEPI focuses on strengthening water security and climate resilience by increasing water supply, improving demand management, expanding rural drinking water services, reusing treated wastewater, and promoting awareness, with a budget of 9.8 billion euros financed mainly by the State and public stakeholders, under the coordination of national steering and technical committees.

2.1.2. The Ministry of Interior

The Ministry of Interior plays a key role in water governance through several specialized departments. The Directorate of Local Authorities acts as the supervisory authority over municipalities, ensuring that local decisions comply with national policies. It oversees municipal budgets, taxation, public service management, concessions, public domain management, and the creation of inter-municipal structures. Through this oversight role, the Ministry ensures that local actions affecting water resources are aligned with national strategies and regulations.

In addition, the Directorate of Local Public Networks is responsible for coordinating water supply and sanitation services, supporting local operators, and contributing to the regulation of public utilities. It supervises inter-municipal utilities and delegated services in charge of drinking water and wastewater management. Economic regulation of the sector is shared among several national bodies in the absence of a dedicated regulator. More recently, the General Directorate of Natural Risks was created to address climate-related risks, including water-related hazards such as floods and droughts.

This structure reflects the growing need to integrate risk management into water policies, particularly in coastal and climate-vulnerable areas.

2.1.3. Ministry of Agriculture in Water Management

The Ministry of Agriculture, Maritime Fisheries, Rural Development, and Water and Forests is responsible for protecting water resources used for irrigation, managing natural resources, land development, and ensuring environmental and sanitary protection. Agriculture represents a major consumer of water in Morocco, especially during dry seasons, which increases the risk of shortages. At the same time, agricultural activities can contribute to water pollution through the use of fertilizers, pesticides, and other chemicals, while coastal areas also face risks of seawater intrusion affecting irrigation water quality.

To address these challenges, the Ministry has developed a strategy focused on water saving and efficient use in irrigated agriculture. This strategy promotes modern irrigation technologies, sustainability, and the use of alternative resources such as desalinated water for agricultural purposes. Governance of the irrigation sector is also being strengthened through participatory management, greater involvement of water users, and the promotion of public-private partnerships. Within the framework of the Green Morocco Plan, climate change adaptation has become a

priority, with a target to save 1.4 billion m³ of water annually and expand irrigated areas by 550,000 hectares without increasing water extraction.

2.1.4. Ministry of Energy Transition and Sustainable Development

The Ministry of Energy Transition and Sustainable Development plays a central role in Morocco's commitment to environmental protection and sustainable development. In line with the global Sustainable Development Goals (SDGs), Morocco has adopted national strategies aimed at reducing energy consumption by 20% by 2030 and promoting sustainable resource management. The Ministry is responsible for coordinating government action in environmental protection, sustainable development, and energy transition. Through its Department of Sustainable Development, it oversees the implementation of environmental laws and policies, including the Coastal Law, and works to integrate climate change considerations into national strategies, public programs, and investment projects. It also ensures environmental monitoring, data collection, and cooperation with national and international partners.

The Department of Energy Transition is responsible for designing and implementing national policies related to energy, mines, and geology. Its missions include ensuring energy security, promoting renewable energy, regulating energy markets, and supervising public enterprises in the sector. It also works to guarantee reliable energy supplies, expand access to energy services, and promote research and innovation in energy and geological resources. Through strategic planning, regional cooperation, and the development of sustainable energy infrastructure, the Ministry contributes directly to the protection of water and natural resources, particularly by supporting desalination projects powered by renewable energy and by integrating environmental considerations into national development policies.

2.1.5. Ministry of Industry and Commerce

The Ministry of Industry and Commerce plays a key role in economic and industrial development while also addressing environmental and water-related challenges. Through its Directorate of Industry and its Directorate of Quality and Market Surveillance, the Ministry promotes a transition toward sustainable and circular economic models that combine growth with environmental protection. Recognizing that industrial activities can affect water resources through pollution and high consumption, it encourages industries to adopt responsible practices, including the installation of wastewater treatment and pre-treatment systems. Many industrial actors are increasingly engaging in collective initiatives, particularly within industrial zones, to reduce environmental impacts. The Ministry therefore acts as an important partner in promoting industrial depollution and ensuring that environmental standards are applied not only for export competitiveness but also for the broader protection of national water resources.

2.2. Public institutions

2.2.1. The National Office of Electricity and Drinking Water ONEE

The National Office of Electricity and Drinking Water (ONEE – Water Branch) is a key national public operator in Morocco. Created in 1972 as a public industrial and commercial institution, ONEE is responsible for planning drinking water supply, identifying needs, securing water resources, and coordinating investments. It designs, builds, and manages water production and treatment infrastructure, particularly in its own service areas and in the southern provinces. ONEE also provides technical assistance and advisory support to the government, public administrations, and local authorities.

Although wastewater management was not originally part of its formal mandate, ONEE gradually took on this responsibility, and since the 1990s it has been legally authorized to manage sanitation services when requested by municipalities. Over time, it has become a major operator in water distribution, especially in small and medium-sized urban centers and rural areas. ONEE now manages water services for millions of users, plays a central role in implementing national sanitation programs, and is increasingly involved in seawater desalination projects. Its dual mission is to act both as a national planner ensuring long-term water security and as an operational service provider working to expand access to drinking water and sanitation across the country.

2.2.2. Agencies under the Ministry of Agriculture, Maritime Fisheries, Rural Development, and Water and Forests (Water-Related Roles)

National Agency for Water and Forests (ANEF)

- Contributes to water resource protection through forest conservation, watershed management, and the fight against desertification.
- Its actions help preserve ecosystems that regulate water cycles, groundwater recharge, and coastal and inland water sustainability.

National Office for Agricultural Advisory Services (ONCA)

- Supports farmers in improving irrigation practices and implementing water-saving techniques.
- Plays a key role in promoting the National Irrigation Water Saving Program (PNEEI) and efficient water use in agriculture.

Agricultural Development Agency (ADA)

- Implements agricultural projects aimed at climate resilience and sustainable water use in irrigation.
- Mobilizes international climate funds for projects that improve water efficiency and adaptation to water scarcity.

2.2.3. Energy and efficiency institutions and water management

Moroccan Agency for Energy Efficiency (AMEE)

- Promotes energy-efficient technologies in water pumping, irrigation systems, and treatment facilities.
- Supports optimization of energy consumption in water infrastructure and desalination processes.

Moroccan Agency for Sustainable Energy (MASEN)

- Develops renewable energy projects that power water desalination and pumping systems.
- Its solar and wind energy programs directly support sustainable and low-cost water production.

National Office of Electricity and Water (ONEE – Electricity Branch)

- Strengthens electricity networks to integrate renewable energy used in water infrastructure.
- Facilitates the energy supply necessary for water treatment, distribution, and desalination plants.

2.2.4. Coordination institutions in water governance

Effective water management in Morocco requires strong coordination because the sector is highly transversal and involves many actors. Several national bodies have been created to ensure coherence between policies and institutions.

- **The National Council for the Environment (CNE)** serves as a consultation platform bringing together ministries, local authorities, industries, universities, and civil society. Its mission is to integrate environmental concerns into economic and social development and to promote sustainable development principles.
- **The Higher Council for Water and Climate (CSEC)**, confirmed by the Water Law 36-15, is the main national strategic body for water policy. Chaired by the Head of Government, it examines and validates major planning tools such as the National Water Plan (PNE) and basin management plans (PDAIRE). It also provides opinions on water legislation, resource allocation between sectors, and the environmental impact of water projects. The Council brings together representatives of government, basin agencies, ONEE, local authorities, academia, and water user associations, making it a key coordination mechanism, although it has not met regularly in recent years.
- **The Interministerial Water Commission**, also chaired by the Head of Government, was created to improve coordination between public institutions. It defined priority actions such as sanitation, improvement of water distribution efficiency, and tariff reforms. Although it provided an effective framework for dialogue for some time, its activity has gradually declined.

2.2.5. Regional Multi-Service Companies (SRM)

Regional Multi-Service Companies (Sociétés Régionales Multiservices SRMs) were created under Law No. 83-21 (2023) as part of Morocco's institutional reform to improve coordination and efficiency in the management of essential public services, particularly water supply, sanitation, wastewater treatment, and electricity distribution. These companies are established at the regional level to replace fragmented management systems and to ensure integrated, territorially based service delivery. Their main objectives are to support advanced regionalization, optimize investments, modernize infrastructure management, and provide citizens with better quality and more responsive services.

The creation of SRMs directly affects the role of ONEE (National Office of Electricity and Drinking Water). When a municipality or region signs a management contract with an SRM, the distribution assets and local networks previously operated by ONEE are progressively transferred to the regional company. ONEE therefore shifts from being a direct local operator to a more strategic role focused on national planning, large infrastructure, production, and technical support, while SRMs take responsibility for day-to-day service management at the regional level.

The SRM model is being implemented progressively across Morocco's 12 regions. As of 2024, the first companies have already been launched in several regions, including Casablanca-Settat, Souss-Massa, Marrakech-Safi, and the Oriental region, with others planned to follow in the coming years. Each SRM operates as a public company with participation from the State, local authorities, and public institutions such as ONEE. This new governance framework aims to strengthen coordination, simplify contractual procedures, and create a unified regional approach to water and sanitation services throughout the country.

2.2.6. River Basin Agencies (Agences de Bassin Hydraulique ABH)

River Basin Agencies (ABH) are the main local institutions responsible for integrated water management in Morocco. Organized at the level of each hydrological basin, they operate as public entities with financial autonomy under the supervision of the Ministry of Equipment and Water. Their basin-based approach allows water resources to be managed according to natural boundaries, encouraging coordination and solidarity among all users and stakeholders.

The ABHs are in charge of planning, monitoring, and regulating water resources. Their key responsibilities include preparing integrated basin management plans, assessing water availability and quality, controlling water use, issuing authorizations and concessions, protecting the public hydraulic domain, and implementing measures to prevent floods and droughts. They also support research and provide technical and financial assistance for water-related projects.

Each agency is governed by a multi-sectoral board that brings together representatives of public authorities, local governments, water users, and civil society. This structure makes the ABH a central platform for consultation and coordination at the regional level. Through their planning,

regulatory, and operational roles, River Basin Agencies play a crucial role in ensuring sustainable and locally adapted water management.

2.2.7. Management through municipal utilities (Régies)

In Morocco, water and sanitation services are often managed locally through municipal utilities known as “régies.” Two main management models exist.

- Direct Management (Régie directe):

In many small urban centers, municipalities manage water and sanitation services directly. The commune itself operates and administers the service without creating a separate organization.

- Autonomous Municipal Utilities (Régies autonomes):

These are public municipal establishments with legal personality and financial autonomy, operating under the supervision of the Ministry of Interior. They are created by municipal councils to manage local public services, mainly drinking water distribution and wastewater management. Each autonomous utility is governed by a Board of Directors, a technical management committee, and a Director in charge of daily operations.

Currently, Morocco has 13 autonomous municipal utilities, mainly serving major cities:

7 utilities managing electricity, water, and sanitation:

- RADEEF – Fès
- RADEEMA – Marrakech
- RADEEM – Meknès
- RAK – Kénitra
- RADEEJ – El Jadida
- RADEES – Safi
- RADEEL – Larache

5 utilities managing water and sanitation only:

RAMSA – Agadir

- RADEEO – Oujda
- RADEET – Beni Mellal
- RADEEC – Settat
- RADEEN – Nador

1 utility managing only water distribution:

- RADEETA – Taza (with wastewater services currently in the process of being transferred)

These municipal utilities remain key local operators for urban water and sanitation services, working alongside ONEE and, more recently, the new Regional Multi-Service Companies (SRMs).

2.2.8. Federations and associations in the Moroccan water sector:

Association Marocaine de l'Eau Potable et de l'Assainissement (AMEPA)

- Role of AMEPA is a national professional platform bringing together public water utilities, municipalities, operators and international partners.
- Main contribution: Capacity building, training, exchange of technical expertise, and support to modernization of drinking water and wastewater services.

Fédération Nationale de l'Eau Potable (FNEP)

- Represents companies and operators involved in potable water production and distribution. Improves operational performance, promotes standards and quality management, and supports sector reforms and public-private cooperation.

Coalition Marocaine pour l'Eau (COALMA)

- Role: Multi-stakeholder coalition including government, private sector, academia and civil society.
- Main contribution: Advocacy, policy dialogue and promotion of sustainable water management and climate resilience at national level.

Confédération Générale des Entreprises du Maroc (CGEM) – Commission Eau & Environnement

- CGEM is a private-sector representation institution. The main contribution: Mobilizes industries around water efficiency, reuse, and environmental compliance; supports investment partnerships and regulatory dialogue.

Associations d'Usagers de l'Eau Agricole (AUEA)

- It is a local farmer water user association managing irrigation networks. The main contribution: Participatory irrigation management, water allocation, maintenance of irrigation systems and water saving practices.

2.3. Private institutions

Morocco uses delegated management (public-private partnerships – PPPs) as one of the models for providing water and sanitation services. Under this system, a municipality or public authority (the “delegating authority”) entrusts the operation of public services to a private operator (the “delegatee”) for a fixed period through a formal contract. The public authority remains the owner of the infrastructure and keeps full control over regulation, supervision, and service objectives, while the private operator is responsible for day-to-day service delivery.

The delegated operator must ensure continuous and safe drinking water supply, maintain water quality, improve network performance, and expand access to services. Contracts generally include technical and financial performance targets such as reduction of water losses, service coverage, and investment obligations.

Several concrete experiences in Morocco illustrate the importance of effective and well-coordinated governance in the water and sanitation sector. Notable achievements by private operators such as Lydec and Redal, as well as initiatives implemented by public entities including the Autonomous Utility of Marrakech and the OCP Group, demonstrate successful approaches to wastewater treatment, coastal protection, and water reuse.

One of the most significant projects is the wastewater treatment system developed by Lydec in Greater Casablanca. This system has enabled the complete depollution of 80 kilometers of coastline, between Mohammedia and Dar Bouazza, eliminating unpleasant odors, restoring marine ecosystems, and revitalizing the tourism potential of the area. Previously, untreated wastewater from urban and industrial sources was discharged directly onto beaches. The SAP-Est system now intercepts all wastewater that was formerly released through nine coastal outfalls. These outfalls are currently used only for excess rainwater, without any toxic pollution.

The main treatment plant processes 55% of Casablanca’s raw wastewater through sedimentation, sand removal, degreasing, and deodorization. Treated water is discharged offshore through a submarine pipeline, where natural ocean processes ensure rapid biological purification. Together with the El Hank treatment station, which handles 45% of the city’s wastewater, the entire Casablanca coastline is now fully protected from liquid pollution.

Another important example is the Tamuda Bay wastewater treatment plant in northern Morocco. This facility allows treated wastewater to be reused for the irrigation of green spaces between the cities of M’diq and Fnideq. Classified as a “clean development” project, it prevents pollution of the coastal environment and contributes to a reduction of approximately 2,000 tons of greenhouse gas emissions per year. The plant covers 35% of its electricity needs, produces 9.5 tons of treated sludge per day for agricultural use, and generates 3,000 m³ of biogas daily. Similarly, the Boukhalef treatment plant in Tangier enables the irrigation of golf courses and public green areas, saving an estimated 3 million m³ of freshwater annually.

In the Rabat–Témara region, the coastal depollution system operated by Redal, inaugurated in 2013, has significantly improved bathing water quality and supported economic and tourism development along the Atlantic coastline. Beyond infrastructure projects, private operators such as Veolia also conduct public awareness campaigns on water conservation, participate in environmental initiatives like “Clean Beaches,” and implement educational programs aimed at strengthening environmental knowledge among teachers and community organizations.

These experiences demonstrate how integrated wastewater treatment systems, water reuse, and strong operational management can generate major environmental, social, and economic benefits, while contributing to the sustainable protection of water resources and coastal ecosystems.

2.3.1. Foreign companies in the Moroccan water sector

Over the past three decades, Morocco has progressively opened its water sector to foreign and private participation to address rapid urbanization, water scarcity, infrastructure deficits, and financing needs. Foreign companies have played a significant role in the management of drinking water distribution, wastewater collection and treatment, and large-scale infrastructure projects such as desalination plants and wastewater treatment facilities.

Historical Entry of Foreign Companies into the Moroccan Water Sector:

- Delegated Management of Urban Water Services:

Foreign companies entered the Moroccan water sector mainly through delegated management contracts in major cities during the 1990s and early 2000s.

Key examples include:

- Lydec (subsidiary of Suez):

Entered Morocco in 1997 through a 30-year concession to manage drinking water, wastewater, and electricity distribution in Casablanca. The contract was awarded directly by local authorities as part of early privatization reforms.

- Redal (later Veolia):

Began operations in Rabat–Salé in 1999, initially under Iberian ownership, then acquired by Veolia in 2004 following financial and governance challenges.

- Amendis (Veolia):

Awarded a concession in 2002 after an international tender to manage water and sanitation services in Tangier and Tétouan.

These contracts marked Morocco’s first large-scale experience with foreign private operators in water services.

2.3.2. Foreign companies in water infrastructure and treatment projects

Beyond service management, foreign companies have been highly active in engineering, construction, and operation of water infrastructure, particularly since the 2010s.

Desalination Projects:

Due to increasing water scarcity, Morocco has turned massively toward desalination, creating major opportunities for foreign firms:

- **Abengoa (Spain):**

Delivered the Agadir desalination plant ($\approx 275,000 \text{ m}^3/\text{day}$), operational since 2019, under a public–private partnership model.

- **ACWA Power (Saudi Arabia):**

Active in several desalination projects in southern Morocco (Laâyoune, Dakhla), often under long-term Design–Build–Operate (DBO) contracts.

- **SUEZ:**

Present in Morocco for over 70 years, SUEZ participates in desalination, wastewater treatment, digital water solutions, and industrial water reuse.

- **Lipu Industry (China):**

Morocco signed the agreement in February 2025 with the Chinese company Lipu Industry to build a major seawater desalination plant in Lamharza Essahel near Casablanca. The facility will initially produce about 548,000 cubic meters of drinking water per day (around 200 million cubic meters annually) for nearly 7 million residents, with a planned expansion to 822,000 cubic meters daily and irrigation for 50,000 hectares of farmland. Costing roughly \$600 million, the project will use reverse-osmosis technology powered largely by renewable energy.

Foreign engineering firms also operate through EPC contracts:

- **Lantania (Spain):** Construction of wastewater treatment plants (e.g. Salé).
- **French, Spanish, and German firms** frequently partner with Moroccan engineering companies such as NOVEC or GMT.

2.3.3. Current status of foreign operators in Morocco

The role of foreign companies has evolved:

- Veolia remains active through Redal and Amendis.
- SUEZ continues to operate through engineering, waste management, and digital water services, often via joint ventures with Moroccan partners.
- Lydec exited the Casablanca market in 2024, with operations transferred to the SRM Casablanca–Settat.

Foreign firms are now less dominant in direct service management but highly active in infrastructure, technology, and operation contracts.

This reflects a shift from privatization toward state-led regional utilities supported by specialized international expertise.

3. Water consumption and its distribution among different sectors

Water consumption in Morocco is characterized by a strong sectoral imbalance, with agriculture overwhelmingly dominating national water use. The agricultural sector alone mobilizes more than **85%** of total water withdrawals, making it by far the largest consumer of water resources in the country. This structural dependence is largely explained by irrigation needs and by the development of intensive agricultural models, including export-oriented crops that require significant volumes of water.

Despite modernization efforts such as the widespread introduction of drip irrigation, overall agricultural water consumption has not decreased. On the contrary, the expansion of irrigated areas and the introduction of high-value but highly water-intensive crops such as avocados, citrus fruits, watermelons, and off-season tomatoes have absorbed most of the water savings generated by improved techniques.

Groundwater plays a crucial role in sustaining this demand. **Approximately 35%** of agricultural water needs are covered by groundwater resources, a proportion that becomes even higher during drought years. Of all groundwater withdrawals, **84%** are dedicated to irrigation, highlighting the extreme dependence of Moroccan agriculture on aquifers. Annual groundwater extraction is estimated at between 5 and 6 billion m³, which exceeds natural recharge by more than 1 billion m³ per year, contributing to chronic overexploitation.

Beyond agriculture, other sectors represent a smaller but steadily growing share of national water demand. Domestic water consumption is rising due to demographic growth, urbanization, and changing lifestyles. The national drinking water consumption reached **1.7 billion m³ per year in 2025**. Urban demand is expected to increase significantly in the coming decades, with projected

growth of around 50% by 2050, while rural domestic demand is expected to grow by approximately 20%.

Industrial water consumption, although still relatively modest compared to agriculture, is also expanding rapidly. Demand from industry (excluding the phosphate sector) is projected to more than double, rising **from 64 million m³ in 2020 to around 156 million m³ by 2050**.

The tourism sector, particularly in major destinations such as Marrakech and Agadir, adds additional pressure on water resources. Although it represents a smaller share of total consumption, its water needs are highly concentrated in water-stressed regions. Tourism-related demand is expected to triple by 2050, increasing from **33 million m³ to 106 million m³ per year**. In cities like Marrakech, the tourism industry alone accounts for **around 6%** of total urban water consumption, a significant proportion in a context of chronic scarcity.

Overall, national water demand is projected to continue rising, from **16.2 billion m³ in 2020 to 18.6 billion m³ by 2050**, representing an increase of about **15%**. However, this growing demand is occurring in a context of declining water availability, making the current consumption model increasingly unsustainable.

4. The current situation of the industry and its development needs

According to the National Water Observatory, Morocco loses approximately 60% of its surface **water** resources each year due to evaporation. Uncovered industrial basins record average losses of 2 to 3 cubic meters of water per day per hectare, an alarming figure in a country where every drop of water counts, Daily estimate: Morocco loses approximately 1.5 million cubic meters of water per day due to evaporation, which represents about one-third of the country's drinking water needs.

Most of the industrial sector's demand stems from the Office Chérifien du Phosphates (OCP)'s needs which are estimated at 260 to 300 million cubic meters per year. Nowadays, OCP has achieved complete self-sufficiency through seawater desalination and water reuse implementation programs.

To address unmet water demands, public authorities are prioritizing deep aquifers, desalination, and treated wastewater. First, a comprehensive mapping of 130 groundwater aquifers has been completed, including 32 deep aquifers. This includes conducting deep drilling operations up to 500 meters and analyzing the water quality of each aquifer. Second, by 2030, the Ministry of Agriculture aims to mobilize nearly 500 million cubic meters of desalinated water for the irrigation of 100,000 hectares. Additionally, the goal is for all potable water in coastal areas to be sourced from desalination by 2030. Third, in terms of treated wastewater reuse, the target is to increase capacity from 40 million to 100 million cubic meters per year by 2027. This initiative will also support the growth of arboriculture.

Aggravating Factors

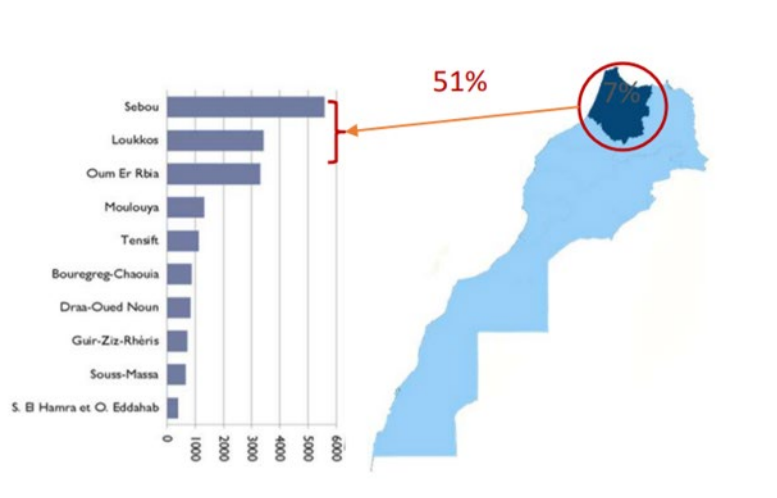
Moroccan regions exposed to extreme temperatures, often reaching 45°C in summer, experience increased evaporation rates. Wind and direct solar exposure further amplify these losses, undermining water conservation efforts. Over the past five years, Morocco has experienced severe drought, resulting in a further decline in water inflows, which now stand at approximately 5 billion cubic meters.

4.1. Drinking water production in 2026

In late 2025 and early 2026, Morocco experienced one of the most significant hydrological reversals in recent years. After prolonged drought conditions since 2018, exceptionally intense rainfall struck the country over a two-month period, particularly in the Gharb and Loukkos regions. The floods affected more than 110,000 hectares and displaced nearly 188,000 people. In response, the government, under the instructions of King Mohammed VI, declared the provinces of Larache, Kénitra, Sidi Kacem, and Sidi Slimane disaster zones.

Between 1 September 2025 and 11 February 2026, cumulative water inflows reached more than 12 billion cubic meters, far exceeding historical averages. Dam filling rates rose sharply to nearly 70% nationwide, with 31 dams exceeding 80% capacity. The Sebou and Loukkos basins reached

near-saturation levels of approximately 90% and 93%, respectively. Major dams such as Oued El Makhazine and Al Wahda recorded record flow rates and storage levels. While this rebound replenished national reserves and improved drinking water security, it also required proactive water releases to maintain structural safety, which contributed to downstream flooding. This period marks the most substantial hydrological recovery since 2018, but it also highlights Morocco's increasing exposure to climate volatility, shifting rapidly from prolonged scarcity to sudden excess.

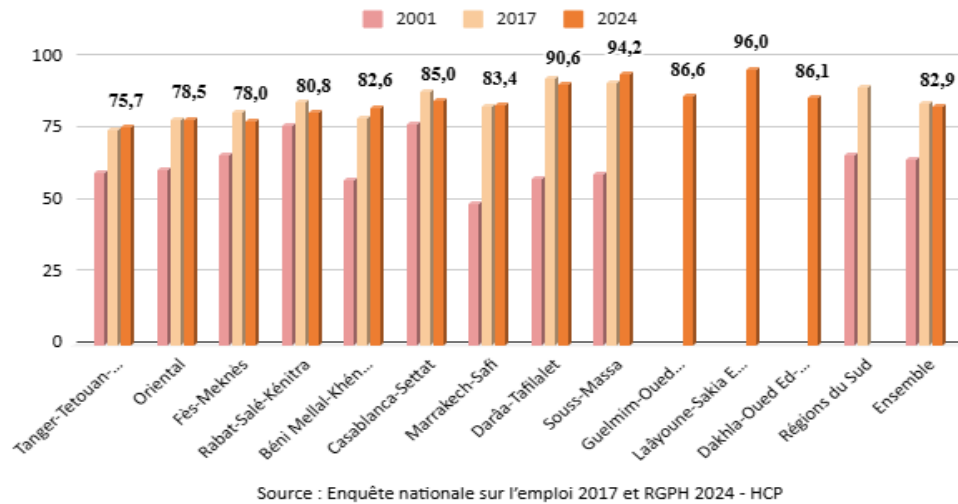


Morocco's Water Resources: Distribution by Hydraulic Basin

4.2. Drinking water coverage in Morocco

According to the latest data published by the High Commission for Planning (HCP) of Morocco, 82.9% of households had a connection to the public drinking water network in 2024. This indicator reflects the proportion of households that are directly supplied with potable water from an established distribution system, highlighting substantial progress in access to basic water infrastructure in the country.

The increasing rate of household connections demonstrates continued investment in expanding water supply networks and improving living conditions, especially as rural and remote areas gradually receive network extensions. While the figure shows that a significant majority of Moroccan households now enjoy network water access, it also indicates that there remains room for further expansion, particularly in zones where households continue to rely on alternative sources such as wells, public fountains, or other equipped points.



It is part of national drinking water supply and irrigation programs led by the Ministry of Equipment and Water and supported by territorial authorities. The State has invested heavily in modernizing networks, constructing pumping stations, and developing water supply systems tailored to remote and isolated areas.

4.3. Wastewater treatment in 2026

Morocco currently operates 41 wastewater reuse projects, collectively enabling the reuse of approximately 32 million m³ of water annually. However, these volumes remain negligible compared with the country's overall water demand, which stands at 16 billion m³ annually, and available water resources, estimated at 5 billion m³.

The Mutualized Plan for Wastewater Management projects a reusable potential of 600 million m³ per year by 2050. However, technical, regulatory and cost-related challenges have led to a more conservative target of 340 million m³ per year, as outlined in the National Water Plan, with the objective of preserving freshwater resources and aquifers.

Morocco treats roughly 1.2 billion m³ of wastewater per year. Once the eight large coastal outfall systems are set aside, the 185 conventional wastewater treatment plants that remain produce about 384 million m³/year. An assessment finds that around 133 million m³/year could be brought to irrigation standard for an incremental capital cost of approximately MAD 260 million (USD 25 million). Installed treatment capacity is equivalent to more than 13% of national agricultural water demand.

Treated wastewater is one of the few water sources that Morocco can expand independently of rainfall. Produced continuously and often close to agricultural demand centres, it offers a reliable and climate-resilient supply that can help reduce pressure on scarce freshwater resources.

Although treated wastewater reuse has long been promoted internationally as a resource that can support urban expansion and agriculture, its implementation in Morocco has faced several

challenges. Treated wastewater management requires robust intersectoral coordination, particularly to minimize public health risks associated with its reuse.

In agriculture, stringent regulations have made it difficult for farmers to adopt reuse practices, restricting them to less competitive crops and increasing management costs. Consequently, reuse projects in Morocco have primarily targeted irrigation of golf courses and green spaces, often integrated into large-scale infrastructure projects in cities such as Marrakesh, Tangier and Rabat.

The reason relatively little treated wastewater reaches farms has more to do with public acceptance and how the sector is organized than with a shortage of water, demand or treatment capacity. No single body is responsible for running the service that would carry treated effluent from the treatment plant to the field and guarantee its quality. The central challenge is therefore institutional and financial as well as technical, although much of the basic treatment infrastructure is already in place.

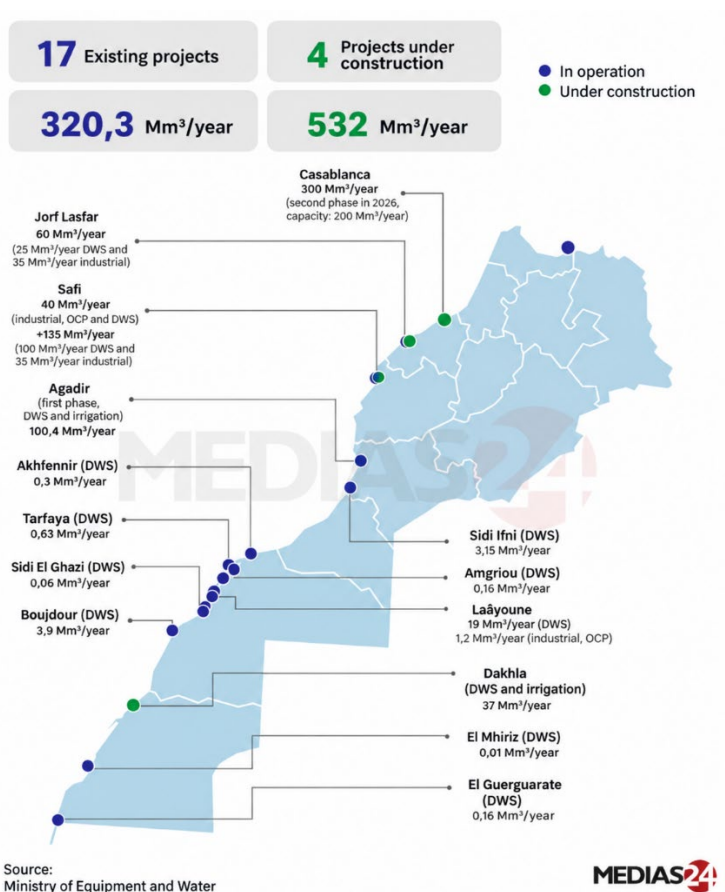
Untreated wastewater has a double effect on water resources and, ultimately, economic activities. Discharging untreated wastewater affects water quality and reduces the opportunity for optimal use of available water resources, while wastewater reuse provides an additional non-conventional water resource that can supplement conventional water resources.

4.4. Seawater desalination in 2026

Morocco currently operates 12 desalination plants with a capacity of 118,700 cubic meters per day and is constructing or planning 7 additional plants with a combined capacity of 396,200 cubic meters per day. The state's goal is to reach a desalination capacity of 1 billion cubic meters per year by 2050.

The Chtouka Ait Baha desalination plant, launched in February 2022, is often showcased as a flagship project. This joint initiative by the National Office of Electricity and Potable Water and the Ministry of Agriculture aims to address both drinking needs for Greater Agadir and irrigation requirements for the Chtouka Plain.

The plant's first phase has a production capacity of 275,000 cubic meters per day, 150,000 cubic meters for drinking water and 125,000 cubic meters for irrigation. However, desalination is a solution that globally faces criticisms regarding its environmental impacts and high costs in investments and operations, due to energy expenditure. Therefore, desalinated water remains expensive for irrigation compared to other sources, except for the irrigation of high-value export crops. For instance, the Chtouka Ait Baha plant irrigates 15,000 hectares, benefiting 1,500 farmers, which produces early crops (particularly tomatoes and berries) destined to European markets.



Projects for seawater desalination currently operational or under development.

4.5. The current state of education and training in the water sector

4.5.1. Key institutions and programs

Morocco's higher education offers a wide range of water-related programs. For example, Université Cadi Ayyad (Marrakech) runs a specialized curriculum in Water Desalination Sciences and Techniques aligned with the national strategy on non-conventional water resources.

Other universities (e.g. Mohammed V Rabat, Hassan II Casablanca, Ibn Zohr Agadir, Abdelmalek Essaâdi, Ibn Tofail) and schools of engineering (EHTP/Hassania, EMI Fès, IAV Hassan II, ENIM Rabat, ENA Meknès) regularly produce graduates in hydrology, water resources and environmental engineering. Many programs are taught in French and prepare students for roles in water utilities, consulting or research.

International Institute for Water and Sanitation (IEA/ONEE, Rabat): Created by Morocco's national water utility (ONEE), this institute provides advanced training and R&D support for water

professionals. It runs workshops on water treatment, network management, and innovative technologies.

University Masters and Specialized Diplomas: Several Moroccan universities offer master's in water-related fields. For instance, the ENSAM Rabat offers a specialized Master in "Water, Energy and Environment" (S3E) to train engineers on integrated water and energy challenges.

Many faculties of science and technical institutes also have master's tracks in environmental management, sanitation engineering, and hydrogeology.

Vocational and Technical Training: Institutions like the Institut Aquacole de Tétouan and regional vocational centers provide shorter courses for technicians in water treatment, irrigation, and distribution systems. The OFPPT vocational school network also runs courses in water sanitation and piping maintenance for operators.

4.5.2. Training needs and skill gaps

Despite this educational infrastructure, stakeholders note gaps between academic programs and sector needs. Observers emphasize that Morocco's water sector is seeking professionals who can translate technology into practice. In late 2025, a high-level review underlined that Morocco has a "strong ambition to modernize its water sector" but urgently needs skilled experts who can implement and operate new technologies in the field. In particular, emerging areas such as desalination, wastewater reuse, irrigation efficiency and climate-adaptive water management are not yet fully covered by existing programs.

Several specific shortfalls have been identified:

- **New Technologies and Digital Skills:** There is a shortage of engineers and technicians trained in digital water management (SCADA, GIS, smart metering) and advanced treatment processes. Local industry reports and job postings (e.g. for hydrology engineers, desalination plant operators) call for bilingual graduates with practical training in these areas.
- **Climate Change Adaptation:** As water stress grows, skills in climate-resilient hydrology and drought mitigation are needed. Moroccan curricula are still adapting to address these issues explicitly.
- **Continuing Education:** Many mid-career water managers seek updating on the latest standards and tools (risk management, water reuse, integrated planning). However, systematic professional development programs are limited.

The ONEE/IEA has noted a need to expand its training outreach beyond central agencies to regional water authorities and municipalities.

In summary, while basic water engineering education exists, Morocco aims to strengthen specialization and lifelong learning to meet fast-evolving demands.

4.5.3. International cooperation and partnerships

Morocco actively engages in water sector cooperation that includes education and training. Notable examples include:

- **South–South Partnerships:** Morocco’s national water utility (ONEE) partnered with Mauritania’s SNDE to transfer know-how. This public-public agreement created a shared platform to build capacity in the Mauritanian water service by pooling expertise from both countries. Such South–South cooperation serves as an on-the-ground training initiative.
- **European and Bilateral Projects:** The Moroccan and Dutch governments signed a Water Action Plan in 2025 that highlights capacity building as a core pillar. This plan sets up exchanges between Moroccan universities and Dutch research institutes, emphasizing vocational training and joint projects in water innovation.
- **France** also supports capacity building through bodies like the Office International de l’Eau (OiEau), which provides training courses and technical assistance to Moroccan water professionals. Germany’s development agency (GIZ) runs programs (e.g. project CESAR II) to train small enterprises and artisans in water and sanitation entrepreneurship.
- **International Events and Networks:** Morocco’s hosting of forums and congresses facilitates knowledge sharing. In December 2025, a Dutch–Moroccan “Water Days” event gathered officials and educators to discuss innovation and skills. The summary report noted that Morocco’s “water resilience” depends on translating scientific knowledge into operational capacity. Morocco is also involved in African and Mediterranean water education networks, and its universities participate in Erasmus+ exchanges in water management.

4.5.4. List of water training institutions in Morocco

- International Institute of Water and Sanitation (IEA – Rabat)

Created by ONEE (National Office of Electricity and Drinking Water), the institute provides continuing professional training for water-sector professionals. It offers specialized courses and seminars (treatment, distribution, sanitation) and supports research and development in the sector. Contact: via ONEE.

- Hassania School of Public Works (EHTP – Casablanca)

A public engineering grande école, EHTP offers a Hydraulic and Environmental Engineering track. This 3-year program trains engineers in civil hydraulics, drinking water supply, sanitation, and hydraulic infrastructure development. The curriculum includes design of water networks, treatment plants, and dams.

- Hassan II Institute of Agronomy and Veterinary Medicine (IAV – Rabat/Meknès/Agadir)

A leading agricultural university, IAV provides programs in rural engineering including water resources management and irrigation. Its continuing education catalogue includes many water- and

environment-related courses (e.g., Water Resources Management, Rural Hydraulics, Master Plans for Drinking Water and Sanitation).

- ENSA Al Hoceima (Abdelmalek Essaadi University)

The National School of Applied Sciences in Al Hoceima offers a Water and Environmental Engineering program. It trains specialists in drinking water treatment, wastewater treatment, and water resource management.

- Higher School of Technology (ESTS – Casablanca), Mohammed V University

This engineering-oriented school delivers a DUT (2-year technical degree) in Water and Environmental Engineering. The program trains higher technicians capable of working in sanitation, water distribution, and hydraulic development. Graduates typically work in engineering consultants and water companies.

- ENSA / Faculty of Sciences and Techniques of Marrakech (Cadi Ayyad University)

Offers an engineering degree in Water Engineering and Geosciences. The multidisciplinary curriculum covers hydrogeology, desalination, wastewater reuse, and GIS applied to water management. Graduates are prepared to manage water resources sustainably and contribute to major projects (desalination plants, wastewater treatment plants, etc.).

4.5.5. Legal system and governance

Morocco's judiciary combines Islamic legal principles with European civil law traditions. The judicial system is headed by the Supreme Court, whose judges are appointed by the Supreme Council of the Judiciary under the authority of the King. The Supreme Court includes constitutional, civil, criminal, administrative, and social chambers, while the Constitutional Chamber reviews legislation for constitutional compliance. This legal framework provides investors with established judicial institutions and dispute resolution mechanisms.

The country has also modernized its legal framework by strengthening:

- Intellectual property protection
- Competition law
- Personal data protection
- Commercial arbitration and mediation
- Foreign investor rights

Morocco is a member of the International Centre for Settlement of Investment Disputes (ICSID) and the Multilateral Investment Guarantee Agency (MIGA), offering additional legal protection for international investors.

5. Economic overview

Morocco has maintained an average annual economic growth rate of approximately **4%** over the last fifteen years. Although economic performance remains sensitive to rainfall due to agriculture's importance, the economy has gradually diversified toward manufacturing, automotive, aerospace, renewable energy, logistics, tourism, and services.

Agriculture remains an essential pillar of the economy:

- Contributes approximately 14% of GDP.
- Provides nearly 40% of formal employment.
- Makes economic growth highly dependent on weather conditions and cereal production.

Years with above-average rainfall generally produce stronger GDP growth, while drought periods reduce agricultural output and slow economic performance. Despite this dependence, Morocco has continued investing heavily in industrialization and export-oriented sectors to reduce reliance on agriculture.

With a GDP exceeding USD 100 billion, Morocco ranks among Africa's six largest economies. However, GDP per capita remains below USD 3,000, reflecting regional income disparities and the significant role of agriculture in the national economy. Economic activity is concentrated primarily in the Casablanca–Settat and Rabat–Salé–Kénitra regions, which receive more than half of public investment, while eastern and inland regions remain less developed.

5.1. International trade and foreign investment

Morocco's strategic location at the crossroads of Europe and Africa has made international trade a cornerstone of its economic development. In the last recent years total foreign trade increased by approximately 30%, although imports continue to exceed exports, creating a persistent trade deficit.

The European Union remains Morocco's largest trading partner, accounting for roughly two-thirds of total trade. Spain and France are Morocco's principal trading partners, followed by China, the United States, Italy, and Germany.

At the same time, Morocco has significantly expanded its economic engagement across Africa. Through diplomatic initiatives led by King Mohammed VI, Morocco has strengthened trade and investment relations with Sub-Saharan Africa, particularly West Africa. Today, Morocco serves as a regional commercial hub for Francophone Africa, with Moroccan companies actively investing in banking, telecommunications, construction, mining, finance, insurance, and real estate throughout the continent.

Foreign Direct Investment (FDI) has remained relatively stable at MAD 30–40 billion annually (approximately EUR 2.8–3.7 billion). Investment priorities have shifted over the past decade from telecommunications toward:

- Automotive manufacturing
- Aerospace
- Renewable energy
- Industrial manufacturing
- Real estate
- Tourism
- Banking and financial services
- Food processing

These sectors continue to receive most of the foreign investment due to Morocco's industrial strategies and export-oriented development policies.

5.2. Investment framework and business regulations

Morocco has implemented extensive legal and institutional reforms to encourage domestic and foreign investment. The government has simplified administrative procedures and strengthened investor protections through legislation covering:

- Labour rights
- Intellectual property
- Industrial property
- Competition law
- Data protection
- Commercial arbitration

The Moroccan Office of Industrial and Commercial Property (OMPIC) manages trademarks, patents, industrial designs, and the national commercial register, ensuring protection of intellectual property rights according to international standards.

Morocco guarantees foreign investors:

- Free transfer of investment capital and profits.
- Protection against unlawful expropriation.
- Access to domestic courts and international arbitration.
- Equal treatment under investment legislation.

The National Business Environment Committee (CNEA) coordinates reforms aimed at improving Morocco's investment climate and strengthening public-private dialogue.

5.3. Free trade agreements

Morocco has built one of the most extensive free trade networks in Africa, providing preferential market access to more than one billion consumers. Major agreements include:

- European Union Association Agreement
- United States Free Trade Agreement
- EFTA Free Trade Agreement
- Turkey Free Trade Agreement
- Greater Arab Free Trade Area (GAFTA)
- Bilateral trade agreements with several Arab countries

These agreements allow companies operating in Morocco to access major international markets with reduced tariffs and improved trade conditions.

5.4. Taxation and Investment Incentives

Morocco offers a competitive fiscal environment for investors.

VAT rates

- 7%
- 10%
- 14%
- Standard rate: **20%**

Corporate income tax

- Standard rate: **30%**
- **37%** for banks and insurance companies
- **15%** for small companies

Morocco also maintains double taxation agreements with **39 countries**, reducing tax burdens for international businesses. Free Zones provide attractive incentives, including:

- 0% corporate tax for the first five years.
- Reduced corporate tax (8.75%) for the following 20 years.
- VAT and customs exemptions.
- Tax-free repatriation of foreign earnings.
- Exemptions from registration taxes and local business taxes.

The government additionally supports strategic investment projects through

- Investment Promotion Fund.
- Hassan II Fund for Economic and Social Development.
- Customs duty exemptions.
- VAT exemptions on eligible imported equipment.

6. Business opportunities

Morocco has entered a new investment cycle in the water sector, moving from individual wastewater treatment projects to large-scale, integrated water security programmes extending to 2050. Instead of the limited number of wastewater treatment plants planned between 2018 and 2020, the current strategy focuses on expanding wastewater collection and treatment services nationwide, increasing wastewater reuse, modernizing existing treatment facilities, and improving environmental compliance.

Under the National Water Plan (2020–2050) and the National Priority Program for Drinking Water Supply and Irrigation (2020–2027), Morocco continues to invest heavily in wastewater treatment infrastructure. The programme includes the construction of new wastewater treatment plants, rehabilitation of existing facilities, expansion of sewerage networks, and implementation of wastewater reuse systems in 128 cities and urban centres, while extending sanitation services to more than 1,200 rural communities. These investments are supported by ONEE, Regional Multi-Service Companies (SRMs), municipalities, and international financial institutions.

Public procurement remains the principal mechanism for implementing these projects. Tenders are regularly issued by ONEE, Regional Multi-Service Companies (SRMs), municipalities, and financing institutions such as the World Bank, European Investment Bank (EIB), European Bank for Reconstruction and Development (EBRD), and the African Development Bank (AfDB). Procurement opportunities include Engineering–Procurement–Construction (EPC), Design–Build–Operate (DBO), Operation & Maintenance (O&M), Public–Private Partnerships (PPP), and consultancy services.

6.1. Priority investment areas (2026–2050)

Current investment priorities include:

- Construction of new municipal wastewater treatment plants.
- Rehabilitation and capacity expansion of existing treatment facilities.
- Development of tertiary treatment systems for wastewater reuse.
- Extension of urban and rural sewerage networks.
- Energy-efficient treatment technologies.
- Digital monitoring, automation, SCADA and smart asset management.
- Sludge treatment, resource recovery and circular economy solutions.
- Operation and maintenance services.
- Engineering, environmental consultancy and technical supervision.

Morocco increasingly relies on public-private partnerships (PPP) and international financing to accelerate implementation of strategic water infrastructure. Alongside conventional EPC and DBO contracts, private-sector participation is expanding in desalination, wastewater reuse, transmission infrastructure, and operation of treatment facilities. Recent investment programmes also encourage long-term partnerships combining engineering, financing, construction, operation, and maintenance.

6.2. Industrial wastewater treatment

Industrial wastewater potential market: Industry plays an important role in the Moroccan economy with contribution to GDP up to 35%. Morocco has 37 industries, of which the key ones are; automotive, aeronautics, electronics, food processing activities, leather craft, products from the sea and textiles. Even though industrial activities consume only 6% of the total water demand, the sector's wastewater effluent has a heavy pollutant load. This by extension significantly increases the water footprint of the industrial sector. Since Morocco is committed to international agreements in environmental protection, all industries must comply with standards for effluent discharge. Efforts are still ongoing to develop standardizations for industrial direct discharge to the environment or indirect to the public sewer system. The total volume of industrial wastewater discharged is about 964 million m³ (around 87% of fresh water consumed). (Source: Ministry of Water)

In its effort to promote the investment environment, the Ministry of Industry, Trade and Investment created industrial zones and parks. These parks offer integrated infrastructure for industries. Clustering industries in zones increases the feasibility of wastewater treatment infrastructure with the possibility of applying economies of scale. It creates the opportunity to build common facilities for treatment of industrial wastewater and for a large-scale reuse of treated domestic wastewater in industries. **Industrial effluent quality:** While most of the discharge volume is generated from chemical and Parachemical industries, it is not the main pollutant in the industrial sector. More than 50% of the organic load is discharged by the food-processing sector, most notably by the sugar-producing industry, slaughterhouses, dairies, cheese makers and oil mills. The food-processing industries are concentrated in the Loukkos basin upstream of the El Makhazine River dam and pose a threat to the quality of water at this dam.

Industrial water reuse represents a rapidly expanding market as manufacturing companies seek to reduce freshwater consumption and improve compliance with environmental regulations. High-potential sectors include:

- Food and beverage processing
- Mining and phosphate industries
- Chemical industries
- Textile manufacturing
- Automotive and aerospace industries
- Industrial parks and free economic zones

Opportunities exist for industrial wastewater treatment, recycling systems, Zero Liquid Discharge (ZLD), process water optimization, digital monitoring, and water efficiency solutions.

6.3. Wastewater reuse

Wastewater reuse has become one of the highest priorities of Morocco's long-term water strategy as the country seeks to address increasing water scarcity, climate change and growing water demand. Under the National Water Plan (2020–2050) and the National Shared Sanitation and Wastewater Reuse Programme (PNAM), Morocco is accelerating investments in wastewater reuse infrastructure to improve water security and reduce pressure on conventional water resources. The programme aims to reuse 573 million m³ of treated wastewater annually by 2040, while extending wastewater treatment and reuse services across urban and rural areas.

Wastewater reuse presents significant business opportunities for Finnish companies across the entire water value chain. Investments are focusing on the construction of new wastewater treatment plants with tertiary treatment, upgrading existing facilities for water reclamation, and developing distribution networks to deliver reclaimed water to end users. Priority applications include agricultural irrigation, industrial processes, urban landscaping, public parks, golf courses, groundwater recharge and environmental restoration.

Business opportunities include:

- Tertiary and advanced wastewater treatment technologies;
- Membrane filtration and advanced disinfection systems;
- Water reuse distribution networks and pumping stations;
- Water quality monitoring and digital control systems;
- Smart irrigation and reclaimed water management;
- Engineering, design and environmental consultancy;
- Operation and maintenance (O&M) services; and
- Digital solutions for monitoring and optimisation of water reuse schemes.

Large-scale wastewater reuse projects are being implemented in several Moroccan cities, including Marrakech, Casablanca, Agadir, Fez, Kenitra, Nador and Al Hoceima, where treated wastewater is increasingly used for irrigation of green spaces, industrial applications and municipal landscaping. At the national level, Morocco plans to implement wastewater reuse projects in 128 cities and urban centres, while expanding wastewater collection and treatment services in more than 1,200 rural communities.

The continued expansion of wastewater reuse infrastructure is expected to generate sustained demand for innovative treatment technologies, engineering expertise and digital water management solutions through 2050. Finnish companies with expertise in water reuse, resource efficiency and circular water management are well positioned to support Morocco's transition towards sustainable and climate-resilient water management.

Potential Reuse (Clients): There is a good opportunity to sell the treated wastewater to the paper and textile industries. They require significant steady water input. In addition, the water quality for paper and textile industries can be easily achieved with minimum additional costs. On the other hand, the industries would enjoy steady flow and wouldn't be subject to drought and fresh water supply shortage.

Morocco's record with reuse is uneven in a revealing way. Golf courses, urban parks and industrial users have taken reclaimed water reliably for years – OCP (Office Chérifien des Phosphates), for instance, recycles all of its treated wastewater across its mining sites whilst the application of treated wastewater in agriculture has not taken off. What separates the two is not the water or the technology but the way each use is organised.

Reuse has proved durable wherever it is tied to a solvent, identifiable customer under a clear agreement, and it has stalled wherever it has depended on fragmented farmers, low willingness to pay and responsibilities that were never properly assigned. There is clear evidence that agricultural demand exists as roughly 70 Mm³/year of untreated wastewater is already used illegally on around 7 000 hectares.

Farmers will use wastewater when it is free and unregulated, which indicates the problem is not a lack of appetite for the resource. There have been pilots aimed at using treated wastewater for agriculture, for example, formal schemes from Oujda to Tiznit were prepared in some detail." follow on with "Land was earmarked land was earmarked, user associations formed, agreements signed, and yet almost no water reaches a field, held up by unresolved questions about who tests quality, who pays for the extra treatment, and who actually owns the service between the plant and the farm.

6.4. Sludge management and resource recovery

Further development of wastewater treatment infrastructure under Morocco's National Water Plan (2020–2050) and the National Shared Sanitation Programme (PNAM) is expected to significantly increase sludge production over the coming decades. As a result, sludge treatment, disposal and valorisation have become strategic priorities for improving the sustainability and operational performance of wastewater treatment plants, creating attractive business opportunities for Finnish companies.

Morocco currently operates more than 150 wastewater treatment plants, generating over 500,000 tonnes of sewage sludge annually. However, sludge management remains underdeveloped due to limited treatment and recovery facilities, an evolving regulatory framework, and insufficient technical capacity. In response, Moroccan authorities, together with ONEE, the Regional Multi-Service Companies (SRMs) and international partners, are promoting pilot projects and national initiatives to develop sustainable sludge management solutions, particularly for agricultural reuse, energy recovery and circular economy applications.

Business opportunities for Finnish companies include:

- Sludge thickening, dewatering and drying technologies;
- Anaerobic digestion and biogas production;
- Thermal treatment and sludge-to-energy solutions;
- Nutrient and phosphorus recovery;
- Composting and agricultural valorisation;
- Biosolids treatment and safe disposal systems;
- Engineering, feasibility studies and environmental consultancy;
- Operation and maintenance (O&M) services; and
- Digital monitoring and optimisation of sludge treatment processes.

The Government of Morocco is also working towards strengthening the regulatory framework for sludge valorisation and supporting demonstration projects that comply with environmental and health standards. These initiatives are expected to accelerate investment in sludge treatment infrastructure and create long-term opportunities for technology providers, engineering companies and research organisations.

6.5. Capacity building and technical training

The wastewater sector in Morocco has attracted the attention of many international organisations, research and training centers from several bilateral development cooperation partners. A number of development cooperation programmes and research projects have been initiated in the wastewater sector and / or subsector (reuse sludge management, etc.), capacity building, training, technical visits and trip studies, etc. Technical support programmes from international agencies, mainly through German cooperation (GIZ, KfW), European partners (European Commission), Canadian cooperation (ACDI), United State Aid (USAID), the Food and Agriculture Organisation (FAO), the World Health Organisation (WHO), UNDP, etc.

Morocco is perfectly located in North Africa, where it has the potential to export knowledge to African and Middle Eastern countries. It has been stated in diverse literature and development corporation reports that the MENA region is lagging in the necessary skills and capacity in the field of wastewater engineering and management. At the same time, ONEE has made successful steps in playing a role in building capacity in other African countries. Speaking Arabic, the official language of MENA region countries, adds to the potential for exporting skilled labour from Morocco to the region. If implemented, a training centre would bring employment opportunities to a wide range of the Moroccan young population by building qualifications that are in demand in the whole region and contribute to economic growth, while solving capacity shortage in other countries in the region.

The sector suffered from decades of under-investment, poor operations and maintenance. Newly constructed plants and networks were often of sub-standard quality. The specific objective is to assist ONEE in effectively training and hiring technicians supporting the operation and maintenance in the wastewater sector. As the organisation is responsible for the provision of water and wastewater services, it has made significant investments in sector infrastructure in the past and acknowledged that equal investments must be made in human resources to manage and preserve those investments.

ONEE has its own training centre. The International Institute for Water and the Sanitation – IEA – was created by ONEE with the aim of improving its training plan. IEA provides short courses (one to two weeks of training) to employees from ONEE, sanitation professionals from Africa. The facilities include classrooms and a conference room that can be used for the pilot project. Once the pilot phase proves the feasibility, the expansion, through construction of physical training centre facilities, can be discussed with ONEE.

7. Recommendations for Finnish companies

Morocco's water sector is evolving rapidly, driven by climate adaptation, urbanization, and substantial public investment. Finnish companies can successfully position themselves by focusing on technologies that improve operational efficiency, reduce energy consumption, and support digital water management.

Priority market opportunities include:

- Advanced wastewater treatment technologies
- Water reuse and tertiary treatment solutions
- Membrane filtration systems
- Smart water networks and digital monitoring
- SCADA and industrial automation systems
- IoT sensors and real-time water quality monitoring
- Leak detection and non-revenue water reduction
- Energy-efficient pumping systems
- Sludge treatment and resource recovery
- Digital twins, artificial intelligence, and predictive maintenance

Rather than competing solely on equipment price, Finnish companies should emphasize lifecycle value, energy efficiency, operational reliability, environmental performance, and technical support. Offering comprehensive solutions including engineering, commissioning, operator training, maintenance, and digital services can provide a strong competitive advantage in the Moroccan market.

7.1. Local partnerships

Developing strong local partnerships is one of the most important success factors in the Moroccan water sector. Public authorities and utilities generally prefer working with companies that have an established local presence and can provide long-term technical support.

Potential partners include:

- ONEE, the national utility responsible for drinking water production and major sanitation projects.
- Regional Multi-Service Companies (SRMs) responsible for regional water, sanitation, and electricity services.
- Moroccan engineering and consulting firms specializing in water infrastructure.
- EPC contractors participating in international infrastructure projects.
- Universities and research institutions involved in innovation and capacity building.
- Industrial operators requiring advanced wastewater treatment solutions.
- River Basin Agencies responsible for water resource management.

A reliable local partner can facilitate regulatory procedures, customer communication, maintenance services, and participation in public tenders while reducing project implementation risks.

7.2. Key success factors

Successful market entry in Morocco is generally based on the following principles:

- Build long-term relationships with customers and public authorities.
- Establish partnerships with reputable Moroccan companies.
- Monitor procurement opportunities continuously.
- Participate in industry exhibitions, trade missions, and business forums.
- Adapt technical documentation and commercial proposals to French.
- Demonstrate compliance with international quality and environmental standards.
- Invest in local technical support and after-sales service.
- Highlight sustainable, energy-efficient, and digital solutions aligned with Morocco's national water strategy.

7.3. SWOT analysis of business opportunities for Finnish companies in Morocco's wastewater sector

Strengths	Weaknesses
Finland is internationally recognised for innovative and sustainable water technologies, particularly in wastewater treatment, digital water management, resource efficiency and the circular economy.	Limited market presence and reference projects in Morocco compared with established European competitors.
Strong expertise in advanced treatment technologies, automation, smart water systems, membrane technologies and energy-efficient solutions.	Limited local partnerships and distribution networks may slow market entry.
Extensive experience in water reuse, sludge valorisation, industrial wastewater treatment and climate-resilient water management.	Higher investment costs of advanced technologies may present challenges in price-sensitive public procurement.
Strong R&D ecosystem and close collaboration between companies, universities and research institutes support innovation and technology transfer.	Language and business culture differences require local expertise and French-speaking partners.
Finland has a strong reputation for high-quality engineering, environmental sustainability and digital innovation.	Procurement procedures and administrative processes may require significant preparation and local support.
Opportunities	Threats
Morocco's National Water Plan (2020–2050) and major public investment programmes are creating sustained demand for wastewater infrastructure, reuse and digital water solutions.	Strong competition from established international companies already active in the Moroccan water sector.
Expansion of wastewater treatment plants, sewerage networks and tertiary treatment facilities creates opportunities for technology suppliers, engineering firms and service providers.	Public procurement decisions may place significant emphasis on project cost rather than lifecycle performance or innovation.
Increasing wastewater reuse for agriculture, industry, landscaping and groundwater recharge is driving demand for advanced treatment technologies and monitoring systems.	Project implementation timelines may be influenced by administrative procedures, financing arrangements and regulatory approvals.
Growing industrial sectors including food processing, mining, phosphate, automotive, textiles and chemicals require industrial wastewater treatment and water recycling solutions.	Evolving regulatory requirements and procurement frameworks may require continuous market monitoring and adaptation.
Expansion of sludge treatment, resource recovery and circular economy initiatives creates opportunities for innovative sludge management technologies.	Exchange rate fluctuations and global supply chain disruptions may affect project costs and competitiveness.
Increasing digitalisation of water utilities creates demand for automation, SCADA, IoT, smart metering, asset management and AI-based monitoring systems.	Growing competition from low-cost technology providers in standard wastewater treatment solutions.
Capacity building, technical training, engineering consultancy and research partnerships offer long-term opportunities for collaboration with Moroccan utilities, universities and research institutions.	Delays in public investment programmes or international financing may postpone project implementation.

7.4. Useful contacts and resources

This section provides a selection of the principal organisations, procurement platforms and information sources relevant to Finnish companies interested in Morocco's wastewater sector.

7.4.1. Key organisations

Organisation	Role	Website
Ministry of Equipment and Water (Ministère de l'Équipement et de l'Eau)	Responsible for national water policy, the National Water Plan (2020–2050), dams, water transfers, and strategic water infrastructure.	https://www.equipement.gov.ma
National Office of Electricity and Drinking Water (ONEE – Water Branch)	Main public utility responsible for drinking water supply, wastewater infrastructure, sanitation projects, and implementation of major water investments. ONEE is also one of the principal contracting authorities for public tenders.	https://www.onep.org.ma
River Basin Agencies (Agences des Bassins Hydrauliques – ABH)	Responsible for integrated water resources management, water permits, groundwater protection and river basin planning.	https://www.eau.gov.ma
Ministry of Industry and Trade	Supports industrial development, industrial zones and investment opportunities related to industrial water management.	https://www.mcinet.gov.ma
Moroccan Investment and Export Development Agency (AMDIE)	Assists foreign investors, facilitates investment projects and provides market information.	https://www.amdie.gov.ma
Moroccan Association for Water and Sanitation (AMEPA)	Professional association promoting knowledge exchange and cooperation in the water and sanitation sector.	https://www.amepa.ma

7.4.2. Tender platforms

Morocco's public water and wastewater projects are mainly procured through national public procurement systems and contracting authorities.

Platform	Description	Website
Moroccan Public Procurement Portal	Official portal publishing public tenders for works, supplies and consultancy services, including water and sanitation projects.	https://www.marchespublics.gov.ma

7.4.3. Key public companies

Organization	Category	Email	Website
OCP Group	Industrial	Contact form	www.ocpgroup.ma
OCP Green Water	Water Reuse	znibar@ocpgroup.ma	www.ocpgroup.ma (cdm.unfccc.int)
SRM Casablanca–Settat	SRM	contact@srm-cs.ma	https://srm.radeec.ma (SRM-CS (Ex-RADEEC))
SRM Rabat–Salé–Kénitra	SRM	Customer service	https://srm-rsk.ma/
SRM Souss-Massa	SRM	Customer service	www.srm-sm.ma/
Sebou Hydraulic Basin Agency	ABH	Official contact page	www.abhsebou.ma/
Hydraulic Basin Agency of Souss-Massa	ABH	Contact form (protected email)	https://abhsm.ma (abhsm.ma)
MASEN	Renewable Energy / Water	Contact form	www.masen.ma
IRESEN	Research	Contact form	www.iresen.org
JESA	Engineering	Contact form	www.jesa.ma
Coalition Marocaine pour l'Eau (COALMA)	Association	contact@coalma.ma	www.coalma.ma (coalma.ma)

7.4.4. Key private companies

Company	Main Activity	Email	Website
NOVEC (CDG Group)	Water engineering, dams, desalination, wastewater	info@novec.ma	https://www.novec.ma (novec.ma)
SOTRADEMA	Water supply, wastewater, irrigation, hydraulic works	contact@sotradema.com	https://www.sotradema.com (sotradema.com)
BENAQUA	Industrial water treatment, desalination	commercial@benaqua.ma	https://www.benaqua.ma (Monyma)
PROLIX WATER	Water treatment, wastewater, RO systems	prolixtechnology@gmail.com	https://www.prolixwater.ma (PROLIX WATER)
OCP Group	Industrial water, desalination	Contact form	https://www.ocpgroup.ma
OCP Green Water	Desalination, water reuse	znibar@ocpgroup.ma (public project contact)	https://www.ocpgroup.ma
Nareva	Renewable energy & desalination	contact@nareva.ma	https://www.nareva.ma
JESA	Engineering, desalination, industrial water	Contact form	https://www.jesagroup.com

InnovX	Water innovation, climate technologies	Contact form	https://www.innovx.dev
CID (Consulting, Engineering & Development)	Hydraulic engineering, dams, water resources	Contact form	https://www.cid.ma

7.5. Projects and investments by region

The list below details the major projects (2024–2026) by region, as well as the national flagship programs. For each project, the type (desalination, dam, sanitation, etc.), estimated investment amount, and implementation period are indicated.

Tanger–Tétouan–Al Hoceïma

- Tangier Desalination Plant (Capacity: 150 million m³/year) – A major project for Greater Tangier, announced for late 2028/early 2029. Status: Tender process imminent, with a Public-Private Partnership (PPP) planned. Impact: Securing the drinking water supply for northern Morocco.
- Mobile Desalination Plants (Tangier/Al Hoceïma) – 9 mobile units are planned in the provinces of Al Hoceïma and Chefchaouen, with an estimated investment of approximately €14.5 million (national funding). Part of the emergency programme for 203 mobile desalination plants.
- Oued El Makhazine → Dar Khroufa Water Transfer – A transfer canal (3.2 m³/s) is under construction to convey surplus water from the El Makhazine Dam to Dar Khroufa (Tangier region).
- Rhiss Dam (Al Hoceïma) – Under construction to improve the drinking water supply of Al Hoceïma. Investment amount not specified.
- 6 New Dams (Small/Medium-sized) – Seven sites are planned in the Tanger–Tétouan–Al Hoceïma region (three in the Loukkos Basin), including the completion of several existing dams.
- Studies and Boreholes – Exploratory drilling and the development of rural wells are continuing, together with participatory groundwater management studies in the Loukkos Basin.
- Wastewater Reuse – Advanced projects for irrigating green areas and golf courses using treated wastewater.

Oriental

- 8 Brackish Water Desalination Plants – A joint project between the State and the Oriental Region, with an estimated budget of approximately €9.6 million, for the construction of eight desalination units in the provinces of Driouch, Figuig, Guercif, Jerada, and Nador. Objective: To secure drinking water supplies for isolated urban centres.

- 3 Seawater Desalination Plants – Connection of three desalination plants (including Berkane and Nador) to the regional water network as part of the national emergency programme.
- Nador Desalination Plant – A large multi-purpose desalination plant (drinking water and irrigation) launched in 2023. Investment amount and production capacity have not been specified. The plant is intended to supply the Nador water network and surrounding agricultural areas.
- Dam Projects – Dam projects in Guercif, Driouch, Taourirt, and Figuig have been launched to secure irrigation under the Green Morocco Plan (PMV) and the National Water Plan.
- Existing Infrastructure – The region already has 24 large dams and 22 small dams, while groundwater resource development has been further strengthened.
- Regional Multi-Service Programme – Creation of a regional multi-service company to manage water and electricity services, with an initial capital of approximately €9.1 million. The initiative is linked to the reform of decentralized utility service distribution.

Fès–Meknès

- Desalination Plant (Rabat–Fès) – Veolia–Morocco project for a plant near Rabat (822,000 m³/day, equivalent to approximately 300 million m³/year) under a Public-Private Partnership (PPP). This facility, launched in 2024, will also meet the demand of the Fès–Meknès region for approximately 9.3 million inhabitants. To date, the technical tender is under preparation.
- Urban Network Reinforcement – Programs for the renewal of drinking water pipelines (e.g., ONEE) and urban wastewater networks are underway (investment amounts not disclosed).
- Wastewater Reuse – The national project aims to reuse 100 million m³ by 2027 (40–50 million m³ reused in 2024), potentially including Fès, an important hydraulic hub.

Rabat–Salé–Kénitra

- Rabat Desalination Plant (Veolia, the largest in Africa) – A 35-year PPP plant with a capacity of 822,000 m³/day (300 million m³/year). Construction begins after 2024, with commissioning scheduled for late 2028/early 2029. Investment amount not disclosed (Veolia investment).
- Bouregreg–Oum Er-Rbia Interconnection – Inter-basin transfer project starting in December 2025, transferring 800 million m³ from the Bouregreg River to the Oum Er-Rbia River to supply El Jadida and Sidi Bennour. Budget not specified.
- PNAEPI Program – Reinforcement of water supply infrastructure (boreholes, aquifers, etc.) for the Rabat metropolitan area and surrounding regions (e.g., Kénitra).

Béni Mellal–Khénifra

- Oued Lakhdar Dam (Aït Majden, Azilal) – Capacity of 151.62 million m³, nationally co-financed, with the tender launched (estimated budget: approximately €107 million). Purpose: transfer to Haouz, drinking water supply, irrigation, and hydroelectric power generation. Construction period: 60 months.
- Taghzirt Dam (Oued Derna, Naour) – Capacity of 83 million m³ (will provide irrigation for the Dir area in Béni Mellal). Estimated budget: approximately €90.8 million, construction period 60 months, tender launched (bid opening in September 2021).
- Other Dams – Programs to raise the height of the Imfout Dam (Settat) and the Tamri Dam (Agadir) are mentioned in the 2021 National Plan, with no direct impact on Béni Mellal.
- Irrigation – Upgrading of irrigated areas (canals, mechanization) under the Green Morocco Plan (PMV) and the Generation Green Plan (2020–2030).

Casablanca–Settat

- Casablanca Desalination Plant – Launched in June 2024 (Lamharza, El Jadida) by SAR Héritier. PPP project, the largest of its kind in Africa. Objective: secure drinking water supply for Greater Casablanca and provide irrigation water. Planned capacity: more than 300 million m³/year. Construction started on 10 June 2024, with commissioning expected by the end of 2026.
- Jorf Lasfar Desalination Plant (OCP) – Inaugurated in 2023, with a capacity of 200 million m³/year (supplying 60 million m³/year to South Casablanca, 30 million m³/year to El Jadida, and 65 million m³/year to the OCP industrial site). OCP Green Water project (private investment, innovative energy efficiency).
- Jorf–Khouribga Pipeline – 200 km pipeline transporting 35 million m³/year of desalinated water to OCP Khouribga and 10 million m³/year to the city of Khouribga. Recently commissioned (2024).
- SMB Monobloc Stations – 28 desalination/demineralization units installed in rural areas by SRM Casablanca–Settat, with a total investment of approximately €36.4 million (approximately €24.7 million from the State and €11.6 million from the Region). These facilities provide drinking water to isolated peri-urban areas.
- Sanitation – Several urban wastewater treatment plants have been modernized (e.g., Nouaceur WWTP); Casablanca's stormwater drainage network has also been strengthened (investment amount not specified).

Marrakech–Safi

- Agadir/Chtouka-Aït Baha Desalination Plant – Started in early 2022, with partial commissioning (supplying drinking water to Greater Agadir), followed by Phase 2 for irrigation. Capacity not specified (estimated at approximately 50–100 million m³/year).
- Marrakech Water Reuse Plant – Commissioned on 17 June 2024, treating 12 million m³/year of wastewater. Operated by OCP Green Water.
- Safi Wastewater Treatment Plant (WWTP) – OCP/RADEES project (2019 agreement) for an industrial wastewater treatment plant, with a budget of approximately €43.6 million financed by OCP, plus approximately €9.1 million for pumping infrastructure. Capacity of approximately 8 million m³/year of wastewater reused for industrial purposes.
- Irrigated Agriculture – Projects to expand irrigated areas under the Green Morocco Plan (PMV) (Al Haouz and Chichaoua regions); technical training provided by ONDA.

Drâa–Tafilalet

- Groundwater Extraction – Deep boreholes for drinking water supply in rural areas (e.g., Tinghir); groundwater recharge projects. Numerical data not available.
- Dams – 14 medium- and small-sized dams are in operation in the Drâa region (e.g., Sidi Said and Kaddoussa), and studies are underway for 4 additional dams (overall budget not disclosed).
- Solar Energy – Small solar power installations on dams (e.g., in the Drâa region) for water pumping.

Souss–Massa

- Tiznit–Taroudant Desalination Plant – A flagship project under the Green Morocco Plan/Generation Green to irrigate 10,000 hectares. Capacity of 350 million m³/year (250 million m³/year for irrigation and 100 million m³/year for drinking water). Total investment of approximately €1.36 billion, including approximately €764 million for the desalination plant itself. Commissioning is planned around 2028. Mixed public-private financing.
- Chtouka-Aït Baha Desalination Plant – See above (Greater Agadir).
- Irrigation Network – Modernization of irrigation canals (Ait Melloul, Adssira) and expansion of drip irrigation under the Green Morocco Plan.
- Agadir Mobile Desalination Plant – Auxiliary unit for isolated areas (small local projects).

Guelmim–Oued Noun

- Sidi Ifni Desalination Plant – Tender launched, with a capacity of 100 l/s (approximately 3.15 million m³/year) for Sidi Ifni. Investment of more than approximately €33.6 million (2020–2027 programme).
- Plage Blanche Desalination Plant (Guelmim–Assa) – Phase 1 project with a capacity of 230 l/s (approximately 7.25 million m³/year), with commissioning planned for 2027. Investment of approximately €90.9 million.
- Sahb El Harcha Plant (Tan-Tan) – Current capacity of 100 l/s, with an extension planned to secure the water supply of Tan-Tan and El Ouatia. Extension cost not specified.
- New Boreholes – 100 l/s borehole at Oued Sayad (Guelmim), 2023 project (approximately €6.4 million); Tan-Tan boreholes (approximately €1.24 million).
- Water Resources Management – Construction of small dams (less than 10 million m³) by the Draa–Oued Noun Agency, together with operations to combat illegal groundwater drilling.

Laâyoune–Sakia El Hamra

- Laâyoune Desalination Plant – New plant (2022) with an investment of approximately €40.9 million, producing more than 26,000 m³/day. The total installed desalination capacity in Laâyoune has been increased to approximately 66,700 m³/day (approximately 24 million m³/year).
- Sanitation and Reuse – A regional wastewater treatment plant (WWTP) (capacity: 18,600 m³/day) supplies treated wastewater for the irrigation of green spaces. Several PNEAM (National Shared Sanitation Program) projects aim to achieve 100% rural sanitation coverage by 2030.

Dakhla–Oued Ed Dahab

- Dakhla Desalination Plant – Agreement finalized in June 2022; capacity of 37 million m³/year (30 million m³/year for the irrigation of 5,000 hectares and 7 million m³/year for drinking water). Integrated pilot project combining desalination and local renewable energy (on-site wind power). 130 km pipeline to the city (approximately €36.4 million). Expected to create approximately 10,000 sustainable agricultural jobs. Status: Financing and agreement phase completed; construction scheduled to begin at the end of 2023/beginning of 2024.
- Collection and Reuse – Urban wastewater treatment plant (WWTP) planned to treat Dakhla's wastewater; treatment volume not specified.
- Irrigation – Pilot irrigation schemes (ONDA) around Dakhla for horticultural production (new irrigation basin planned).

7.6. National projects and cross-cutting programmes

In addition to the regional projects, several national framework programmes structure the overall effort:

- National Water Plan 2020–2050 – Long-term strategic framework. It aims to achieve approximately 1 billion m³/year of desalinated water production and 340 million m³/year of treated wastewater reuse by 2050.
- PNAEPI 2020–2027 (National Drinking Water Supply and Irrigation Programme) – Budget of approximately €10.5 billion. The programme aims to secure 90% drinking water coverage and 100% access to targeted irrigation by 2030.
- National Shared Sanitation Programme (PNAM) – Expansion of sanitation services to rural areas and promotion of treated wastewater reuse (target: 340 million m³ of reused wastewater).
- Desalination Emergency Programme – 203 mobile/decentralized desalination units, co-financed by the State and the Regions (total budget of approximately €218 million). The programme provides a temporary solution to rural water shortages.
- Inter-Basin Water Transfers – For example, the Bouregreg–Oum Er-Rbia interconnection (800 million m³), improving the balance of water resources across the country.
- Dams and Water Transfers – Ongoing programme including 14 large dams (with a combined storage capacity of more than 10 billion m³) and 155 additional medium- and small-sized dams to be completed by 2027. Example: three dams launched in 2021 (Lakhdar, Taghzirt, and Kheng Grou) with a combined investment of approximately €273 million.

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