

Morocco

Archetype **Fast-build capital hubs**

GDP / person **\$5k**

Population **38M**

10-yr trend **2.6%**

Gradual **13%** · **#28**

Fast **18.2%** · **#35**

WHERE MOROCCO STARTS

Morocco enters the AGI era as the only lower-middle-income country among the fast-build capital hubs. These are the places that turn capital into physical AI capacity — power, data centers, industrial land — at speed. The scores say why Morocco belongs. Physical build speed is 4.6 out of 5: Noor solar, Tanger Med, Africa's first high-speed rail, land pre-zoned for industry. AI diffusion capacity is 3.9. Morocco has also placed itself as Europe's southern energy partner, with Atlantic data cables and power interconnectors under way. What is missing is what its income implies. Compute access scores 1.5, because Morocco has almost no data-center capacity today. At roughly \$4,700 GDP per person, the capital to build it is scarce. Ten-year trend growth of 2.6% a year understates what the infrastructure is being prepared for. Every scenario turns on whether the capital and the chips arrive.

THE THREE PATHS

These are simulations, not forecasts. The Modest path is the baseline; the two AGI scenarios fork from it. Under the **Modest** scenario, AI stays a normal technology. Morocco would gain a small lift on trend: 2.9% growth a year, 78th of 157. Its build-out would mainly serve the European energy relationship it already has. Under **Gradual** takeoff, growth would climb for two decades and reach 13% a year once AGI matures around 2045. That would place Morocco 28th in the world, ahead of every G7 economy except the United States. The long runway gives its builders time to turn location, power and openness to construction into hosted computing and services for Europe. An economy growing at 13% doubles in under six years. Under **Fast** takeoff, growth would reach 18.2% a year from the early 2030s, a doubling every four years or so. But Morocco's rank would slip to 35th, because a fast world puts more weight on the compute and frontier access Morocco does not yet hold. Politics could slow or redirect any of these paths. How Moroccans and their government respond to transformative AI is a variable the model holds constant.

HOW YOU WOULD KNOW WHICH WORLD YOU ARE IN

The scenarios look almost the same until about 2030. In all three, the late 2020s add only fractions of a point to growth. So watch leading indicators, not GDP, and watch them live. Three global signals matter most. First, whether the METR task-horizon curve keeps doubling every four to five months through 2027–28; METR publishes it at metr.org. Second, whether frontier-lab revenue and capital spending keep compounding; Epoch AI tracks both at epoch.ai. Third, whether growth in the ten to twenty most-ready economies — the United States and China above all — breaks above trend in the early 2030s. Double-digit growth there within a couple of years of 2030 would signal a fast world. A point or two above trend by the

mid-2030s would signal a gradual one. A fade back to trend would signal a modest one. Morocco's own signals would arrive earlier than the growth data: hyperscaler or EU hosting commitments on Moroccan soil, financial close on the cable and interconnector projects, and the order books of the automotive plants.

IF GROWTH GOES EXPLOSIVE

Explosive is relative. At 13% growth a year, Morocco would still trail the frontier, because the United States would be compounding half again as fast. But it would run far ahead of its own history and its region. The economy would double roughly every six years, so a teenager today would reach her mid-thirties in a country four times richer. Electricity and computing services to Europe could become a fiscal pillar alongside phosphates, and rising wages at home would ease the pressure to emigrate for work. There is a way this leaves Morocco worse off, and it is worth naming. Hosted compute is an asset only if Morocco owns it rather than rents it. Data centers financed and controlled from abroad can be throttled or repriced by decisions made elsewhere. And the ladder Morocco has climbed — assembling cars and stitching textiles for Europe — is the first kind of work factory automation reprices. The hedge is to move from renting capacity to owning it, and up the value chain rather than defending the bottom of it. Even then, the pace-setter would shift from the construction site to the state, testing how fast ministries, walis and courts can permit, adjudicate and count.

WHAT MOROCCO CAN DO NOW

Three levers follow from the scores, and two of them pay off whether or not AGI arrives. The first is AI diffusion, already Morocco's strength at 3.9. Skills, permissive deployment and digital government carry the most weight in the skeptic's world, so protecting them is a no-regret move. The second is climate and water resilience, low at 1.9. Flood, heat and water defense protects the economy under every scenario, and cooling and water are the very inputs a data-center build would need. The third lever is the bet. Compute and energy access, at 1.5, barely moves growth if AI stays ordinary, but under a fast takeoff it becomes Morocco's single biggest lever. Closing it means packaging power, land and fast permits to attract investment. A \$4,700-per-person economy cannot raise the capital alone, so the build needs co-investment from European utilities and sovereign funds. Morocco can copy a working model from its own archetype: Malaysia turned the Johor corridor into one of the world's fastest-growing data-center clusters by pre-zoning land and power for hyperscalers. A cautious government can act on the two no-regret levers today and lose nothing if the skeptics are right. To see how moving any of these scores changes Morocco's path under each scenario, open the atlas's [policy editor](#).

The three levers — and which pay off regardless

Climate & water resilience

score 1.9 / 5 · weight 8 under skeptic → 7 under fast takeoff

Counts under the Modest scenario too (8→7). Closing this gap pays off whether or not AGI arrives.

No-regret

AI diffusion capacity

score 3.9 / 5 · weight 24 under skeptic → 13 under fast takeoff

Already a strength, and it carries weight in every scenario (24→13). Protecting it pays off whether or not AGI arrives.

No-regret

Compute & energy access

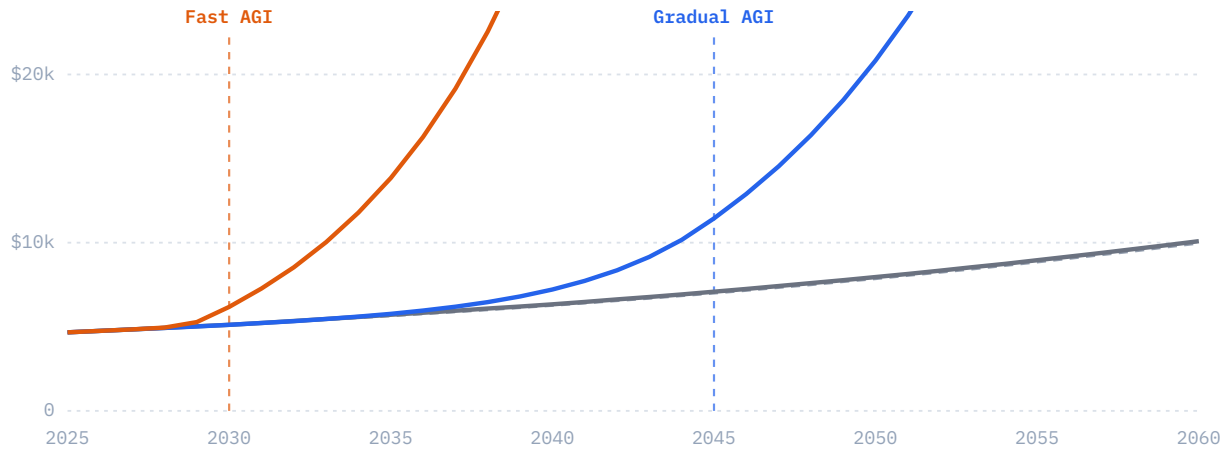
score 1.5 / 5 · weight 8 under skeptic → 24 under fast takeoff

Weight climbs from 8 to 24 as takeoff nears. It barely moves growth if AI stays ordinary — the lever that needs a view on the takeoff.

AGI bet

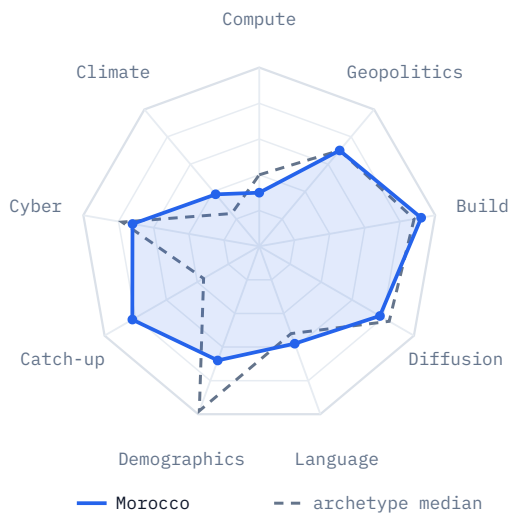
The no-regret levers pay off in every scenario, so a cautious government can act on them today. The AGI bet becomes decisive only if takeoff is real.

GDP per person to 2060, by scenario



Linear scale; solid lines are the three scenarios, dashed grey the no-AI baseline. Growth ramps from 2027 to each scenario's rate at its AGI year (Fast ~2030, Gradual ~2045), then holds. Timing and divergence are the point, not end levels; steep paths exit the top of the capped axis.

The nine factors



Solid: Morocco. Dashed: the median of its archetype. Scores are relative to the other 156 countries (3 = global median, 5 = leading today).

Outcomes under each scenario

SCENARIO	GROWTH / YR	WORLD RANK	INDEX	DOUBLING
Modest	2.9%	78 / 157	68.9	24.2 yrs
Gradual	13%	28 / 157	65.9	5.7 yrs
Fast	18.2%	35 / 157	62.7	4.1 yrs

Post-AGI growth rate, rank among 157 countries, AGI Growth Index (0–100, scenario-weighted), and the implied economy doubling time. The Modest path is the baseline the AGI scenarios fork from.

THE THREE SCENARIOS

Modest the Acemoglu view

AI as a normal productivity tool

Intelligence was never the binding constraint on growth, so AI delivers real but ordinary gains. Each country gets a one-time boost of a couple of percent of GDP, phased in through 2035; growth then returns to trend. The mainstream-economics view.

≤0.66% TFP over a decade – a one-time gain

Morocco: 2.9% growth a year · #78 of 157

Gradual Erdil & Besiroglu, base case

Broad automation, on a long timeline

Broad automation of remote work arrives around 2045, with gains building slowly from the late 2020s. Growth then reaches up to ~20% a year for the best-positioned countries — ten times today's frontier trend. A slow arrival gives countries time to adapt, so the gains are wide but uneven.

up to ~20%/yr after 2045 – 10× the frontier trend

Morocco: 13% growth a year · #28 of 157

Fast Erdil & Besiroglu, fast takeoff

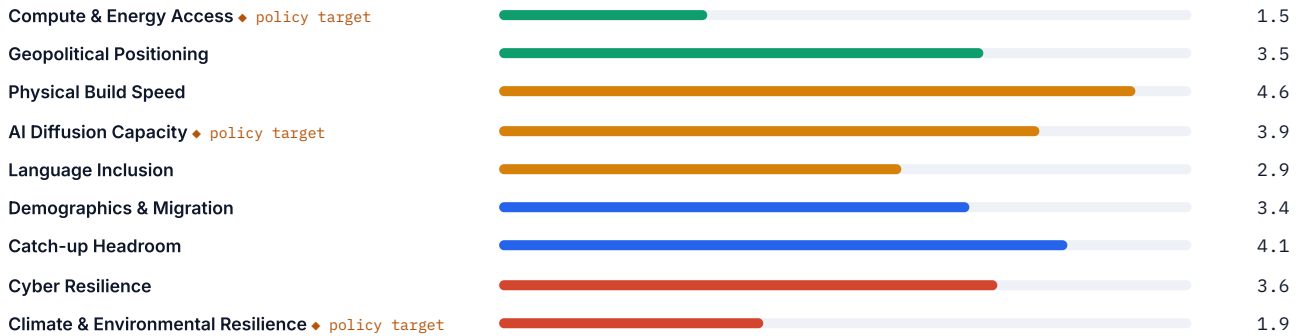
Fast takeoff — today's infrastructure decides

Transformation lands around 2030, before countries can adjust. Whoever already owns compute, capital and the ability to build wins; the gap between countries widens dramatically — and some are left growing slower than they would have without AGI.

up to ~40%/yr from 2030

Morocco: 18.2% growth a year · #35 of 157

Factor scores — and where policy bites



♦ marks this country's highest-leverage policy targets: the weakest factors carrying the most weight under the AGI scenarios. The atlas's interactive policy editor (agigrowth.org/#editor) simulates how raising any score changes growth under each scenario.

Archetype: Fast-build capital hubs

Capital converts into physical AI capacity: power, data centers, new cities — built at speed.

Wins: The build-out — late in the gradual world, immediately in the fast one.

Watch: Heat and water; imported talent; bought compute is revocable in a way owned capability is not.

Malaysia **15.7%** · #8

United Arab Emirates **14.7%** · #15

Turkey **13.1%** · #26

Saudi Arabia **12.5%** · #33

Bahrain **11.2%** · #40

Qatar **11.1%** · #41

Romania **10.4%** · #50

Oman **8.7%** · #75

The regional picture — Petro-capital pours into compute.

The Gulf is running the clearest experiment in buying a place in the AI economy. Sovereign capital converts hydrocarbons into compute: the UAE and Saudi Arabia have secured government-to-government chip-access agreements and anchor announced build-outs far beyond their economic size, and the UAE posts the world's highest measured AI adoption — about 70% of its working-age population in Microsoft's 2026 data. The dependency is explicit: those agreements, not geography, connect Gulf capital to frontier silicon, and they are revocable at each turn of American politics. The physical constraint is just as explicit: more than 180 days a year above 35°C makes cooling the binding input and water the scarcest one. Israel supplies the region's frontier R&D; Morocco builds steadily at Atlantic temperatures and positions itself as Europe's southern energy partner; Egypt has the population without the complements; Iraq pairs oil with the region's weakest institutions. The twenty-year test of the Gulf model is whether bought compute becomes owned capability — or remains a well-provisioned tenancy.

Method, in brief

Each country is scored 1–5 on nine factors from public data (World Bank, Epoch AI, ITU, IMF and national sources). A scenario-weighted average forms the AGI Growth Index (0–100), which maps to a post-AGI growth rate inside ceilings derived from Erdil & Besiroglu (2023): ~20% growth a year for the best-positioned country under Gradual takeoff (AGI ~2045), ~40% under Fast (AGI ~2030); growth ramps convexly from 2027. The scenario sets the growth rates on offer; the index only decides where each country sits within them. The Modest scenario is the skeptics' baseline — a small uplift on each country's own ten-year trend. These are simulations for structured thinking, not forecasts; no probabilities are attached to any scenario.

Watch the global signals live: the METR task-horizon curve at metr.org/time-horizons · frontier-lab revenue at epoch.ai/ai-companies · AI-chip spending at epoch.ai/ai-chip-sales.

Explore further: full methodology agigrowth.org/#methodology · map & rankings agigrowth.org/#explore · country profiles agigrowth.org/#countries · policy editor agigrowth.org/#editor