

POLICY
BRIEF 02

Morocco's Defense Modernization: Strategic Investments in Security

GEOPOLITICAL MONITOR

On March 5, 2025, the Royal Armed Forces (FAR) of Morocco welcomed a significant addition to their arsenal with the delivery of American AH-64 Apache combat helicopters, marking a major milestone in a multi-year effort to transform the country's defense capabilities. This acquisition, part of a broader strategy to acquire advanced military systems, underscores Morocco's response to a shifting regional landscape defined by rivalries, instability, and evolving threats. The biggest rival is Morocco's immediate neighbor, Algeria, which relies on its resource wealth. Algeria ranks third globally in military spending-to-GDP ratio, behind Ukraine and Israel. Combined with persistent challenges in and around its territories, Morocco has pursued a deliberate transition toward high-tech, interoperable systems to ensure territorial integrity. Beyond the AH-64 Apache helicopters, the acquisitions span broader categories such as drones, artillery, and missile defense systems, illustrating Morocco's qualitative approach with a strong focus on aerial systems.

This policy brief explores the factors driving Morocco's strategic military investments, their role in reshaping its defense posture, and the opportunities and challenges they present. What threats do these acquisitions aim to counter? How do they position Morocco in regional and global security frameworks? And can Morocco sustain this modernization while fostering economic and industrial growth?



Signals to Decode

Morocco's military acquisitions reflect a strategic adaptation to a complex security environment. The substantial investments by a neighboring state in advanced armaments, fuelled by its resource wealth, aim to assert regional dominance, posing a direct challenge to Morocco's security. Simultaneously, separatist activities in the South, supported by external actors, require surveillance and rapid-response capabilities tailored to the terrain. Militias and jihadi groups in the Sahel add to the increasing arms race in the region. Hence, the acquisition of Turkish-manufactured drones, which enhance Morocco's intelligence, surveillance, and reconnaissance (ISR) capabilities. In April 2021, Morocco ordered 13 Bayraktar TB2 drones for \$70 million, with an additional six units acquired in a subsequent deal, bringing the total to 19 TB2 drones. These Medium Altitude Long Endurance (MALE) unmanned combat aerial vehicles (UCAVs) are designed for ISR with attack capabilities. With a 27-hour endurance, a 150-kilometer operational range, and a payload capacity for laser-guided bombs, the TB2 enables Morocco to conduct

persistent surveillance over vast desert regions, making it ideal for monitoring separatist movements and border threats. Additionally, Morocco has received its first batch of Bayraktar Akinci drones, with reports indicating an order of an undisclosed number as part of an agreement signed in 2023. The Akinci represents a heavier, more advanced UCAV platform, capable of carrying larger payloads, including air-to-air missiles and precision-guided munitions. With a 40-hour endurance, a 7,500-kilometer range, and advanced avionics for electronic warfare, the Akinci enables deep strikes and disruption of enemy communications. Its ability to operate at higher altitudes and integrate with satellite systems further enhances Morocco's ISR capabilities, providing a strategic advantage in addressing Sahel-based threats. To support these acquisitions, Baykar, the Turkish manufacturer of the TB2 and Akinci drones, announced in early 2025 the opening of a new maintenance and production facility in Morocco. This factory aims to serve Morocco's growing drone fleet, potentially producing up to 1,000 Bayraktar TB2 and Akinci drones annually, fostering local technical expertise and reducing reliance on foreign maintenance, which aligns with Morocco's vision of industrial sovereignty.

Morocco has prioritized systems emphasizing precision and technological superiority, as evidenced by upcoming military acquisitions, including American F-16 Block 70/72 aircraft, scheduled for delivery in 2027. These advanced multi-role fighters are equipped with the APG-83 active electronically scanned array (AESA) radar, offering superior detection and tracking of air and ground targets. With a combat radius exceeding 550 kilometers. Recent purchases further underscore this commitment to advanced capabilities, notably in artillery. The Atmos 2000 from Israel, a 155mm howitzer with a range of up to 41 kilometers using extended-range munitions, offers rapid deployment and high mobility, making it well-suited for Morocco's desert terrain. This acquisition complements the existing 36 Caesar howitzers purchased from France in 2022, enhancing the FAR's ability to deliver precise, long-range fire support against ground threats, further solidifying Morocco's defense posture.



Does Morocco have a Role to Play?

Morocco's modernized military positions it to play a central role in regional stability and international security cooperation, aligning with its long-term vision of leadership and sovereignty. Advanced unmanned aerial vehicles (UAVs) and electronic warfare systems enable proactive monitoring of cross-border threats, providing a stabilizing presence in the Sahel, where political upheavals have weakened regional alliances, creating a need for neutral mediators. Morocco's diplomatic neutrality enables it to facilitate dialogue between conflicting Sahel blocs, potentially bridging divides between West African and Sahelian states. By fostering such cooperation, Morocco can help stabilize the region, reducing the risk of threat spillover to its southern borders and strengthening its regional anchoring. Additionally, Morocco's involvement in the NATO Southern Partnership, as a member of the Mediterranean Dialogue since 1994, is a critical factor in enhancing interoperability with Western states. Morocco's strategic alignment with the United States through the annual African Lion exercise further amplifies its role in global security frameworks. African Lion, the largest US military exercise in Africa, brings together over 7,000 participants from multiple nations to enhance interoperability and counterterrorism capabilities. Morocco has hosted this exercise since 2007, leveraging its modernized forces, such as F-16 aircraft and HIMARS systems expected to be part of future FAR acquisitions, to demonstrate operational readiness and leadership. This aligns with the US strategy of seeking reliable regional allies to share security burdens, particularly after the US withdrawal from Niger in 2024. Morocco's participation not only strengthens its military synergy with the US but also positions it as a key partner in countering Sahel-based threats, enhancing its sovereignty through deeper alliances and access to advanced training and intelligence-sharing opportunities. Morocco's strategic location positions it to play a vital role in securing the maritime space, particularly with regard to transatlantic security and the Strait of Gibraltar. The Strait, a critical chokepoint for global trade and energy shipments, requires robust monitoring to counter threats like piracy and trafficking. By developing its naval capabilities and leveraging ISR systems, Morocco can contribute to maritime security, enhancing transatlantic cooperation and reinforcing its role as a key partner in ensuring the stability of this vital corridor.



Points of Vigilance

Morocco's defense investments, while transformative, require careful navigation to maximize their impact and align with the Kingdom's long-term vision of sovereignty and regional leadership. Managing supplier diversity is critical to avoid over-reliance on a single partner, ensuring resilience against shifts in global alliances that could disrupt access to critical technologies. For instance, while partnerships with countries like the United States, France, and Turkey provide advanced systems, Morocco must maintain a balanced portfolio to preserve autonomy, negotiating contracts that include technology transfers and local production clauses to bolster self-sufficiency over time. This approach ensures Morocco can sustain its defense capabilities independently, even amid geopolitical uncertainty, reinforcing its sovereignty. Integrating complex systems, such as advanced drones, missile defenses, and fighter jets, demands sustained investment in training and infrastructure to achieve full operational capability. According to the Stockholm International Peace Research Institute (SIPRI), in 2024, Morocco allocated \$5.5 billion to military expenditures, representing 3.5% of its GDP, marking a 2.6% increase compared to 2023. The United States stands as the primary source of Morocco's military investments. In 2019 alone, Morocco secured \$10.3 billion in arms deals with the U.S., primarily for the Royal Moroccan Air Force, including systems like the AH-64 Apache helicopters and F-16 jets. A 2023 deal saw the U.S. approve a \$750 million sale for M142 HIMARS and ATACMS missile systems.

Developing a sovereign defense industry, a cornerstone of Morocco's vision, requires leveraging existing resources to overcome technological and expertise gaps through long-term partnerships and innovation. Morocco, recently integrated into Lockheed Martin's global F-16 production chain, can capitalize on its geographic position and industrial hubs like Nouaceur to establish defense manufacturing centers, initially focusing on producing components for drones and artillery systems already in service, such as spare parts for Caesar artillery or Bayraktar drones. It is also critical to avoid over-dependence on specific countries, which could compromise Morocco's strategic independence. While current suppliers offer critical technologies, Morocco must continue diversifying partnerships to include emerging defense players like India, Brazil, or South Korea, known for cost-effective, high-quality systems. Negotiating agreements prioritizing local assembly and maintenance capabilities ensures Morocco builds its own expertise, reducing vulnerabilities to external pressures. This diversified approach not only strengthens Morocco's sovereignty but also positions it as a collaborative partner in the global defense ecosystem, enhancing its diplomatic influence.

OPPORTUNITIES & RISKS



Opportunities



Territorial Sovereignty

Morocco's enhanced military capabilities, particularly in surveillance and precision strikes, significantly strengthen its military posture in the south. Advanced systems like the Bayraktar TB2 and Akinci drones provide persistent intelligence, surveillance, and reconnaissance (ISR) capabilities over vast desert regions, enabling the Royal Armed Forces (FAR) to detect and neutralize separatist activities with unprecedented precision. Similarly, AH-64 Apache helicopters, equipped with advanced targeting systems like the Target Acquisition and Designation System (TADS), deliver precise strikes against mobile targets, even in challenging terrain. By demonstrating a robust defense posture, Morocco consolidates its territorial sovereignty, pushing for outcomes aligned with its long-term vision of unified national sovereignty.



Regional Influence

Morocco's investment in advanced defense systems positions it as a key player in countering Sahel instability, attracting support from global powers seeking reliable regional partners. The Sahel region, plagued by jihadist insurgencies and political upheavals in countries like Mali and Burkina Faso, presents a persistent security challenge threatening the stability of North and West Africa. Morocco's capabilities, such as the Akinci drones with their 40-hour endurance, 7,500-kilometer range, and electronic warfare functions, enable effective monitoring and neutralization of cross-border threats. This operational reach allows Morocco to contribute to regional counterterrorism efforts, such as disrupting insurgent supply lines or providing intelligence, surveillance, and reconnaissance (ISR) support to allied forces. As a result, global powers that have faced setbacks in the Sahel, such as France, following its 2023 withdrawal from Mali, and the United States, after its 2024 exit from Niger, view Morocco as a dependable partner to anchor security initiatives. NATO, in particular, is likely to increasingly rely on Morocco's capabilities, given its long-standing partnership through the Mediterranean Dialogue and its strategic location as a gateway to Africa. Morocco's interoperability with NATO systems, demonstrated through joint exercises and the integration of U.S.-supplied equipment like the F-16 Block 70/72 jets, makes it a valuable ally for addressing Sahel-based threats that impact transatlantic security. Furthermore, Morocco's plans to establish a new aerial base in the southern region, announced in early 2025, will enhance its ability to conduct aerial operations in the Sahel. This base, designed to house drones and fighter jets, could serve as a launchpad for ISR missions and precision strikes against terrorist groups, extending Morocco's operational reach into the Sahel and reinforcing its role as a regional security hub. By leveraging its military capabilities and strategic infrastructure, Morocco not only strengthens its regional influence but also secures diplomatic and technical support from global powers, aligning with its vision of becoming a stabilizing force and leader in African security cooperation.



Partner Diversification

By diversifying its military suppliers, Morocco strengthens ties with a range of global partners, enhancing its strategic autonomy while deepening bilateral relations. The acquisition of Bayraktar TB2 and Akinci drones from Turkey illustrates this approach, fostering technical cooperation and joint training programs that bolster Morocco's ISR capabilities while solidifying Turkey-Morocco defense ties. France, a long-standing partner, supplies Caesar artillery systems, enhancing Morocco's ground operations with mobile, precise firepower; this partnership includes maintenance agreements and technical exchanges, strengthening Franco-Moroccan military collaboration. Israel's provision of satellite-based intelligence and surveillance systems enhances Morocco's situational awareness, particularly in the Sahara, building on post-Abraham Accords cooperation, including intelligence-sharing frameworks. These diversified partnerships enable Morocco to navigate global power rivalries, ensuring access to cutting-edge technologies while fostering diplomatic goodwill, supporting its sovereignty claims and regional influence.



Risks:



Regional Escalation

Regional dynamics pose challenges potentially drawing Morocco into a destabilizing cycle of military one-upmanship. By emphasizing defense investments as a means of stability rather than provocation, such as focusing on defensive systems like the Patriot PAC-3, Morocco can avoid a costly arms race that risks diverting resources from its broader vision. This strategic restraint ensures its military buildup consolidates regional security without triggering unnecessary conflict. Morocco must avoid being drawn into excessive spending driven by an arms race, which could strain its economic resources and compromise its broader development goals. By focusing on quality over quantity, investing in systems offering long-term strategic value, such as interoperable, versatile platforms like the F-16 Block 70/72 jets, Morocco can achieve a qualitative edge without exceeding its budget.



Industrial Barriers

Developing a sovereign defense industry, a key pillar of Morocco's long-term vision, requires overcoming significant technological and expertise barriers, demanding sustained commitment and resources. While Morocco has initiated partnerships with international firms, such as Turkey for drone production and France for artillery maintenance, it still faces gaps in advanced manufacturing capabilities and skilled labor. Producing components locally for systems like Caesar artillery or Patriot PAC-3 requires precision engineering expertise, an area where Morocco is still developing capacity. To bridge these gaps, Morocco must invest in a broader vision of a sovereign defense industry, requiring specialized programs to train engineers and technicians and establish innovation hubs in industrial zones, aligning with its vision of industrial autonomy.



Naval Capabilities to Develop

Despite its strategic purchases, the Morocco's naval capabilities remain the point to strengthen, as current investments focus primarily on land and air domains, leaving naval capabilities less prominent, to secure its vast coastline and maritime interests. With more than 3,500 kilometers of coastline along the Atlantic Ocean and Mediterranean Sea, Morocco faces potential threats such as maritime trafficking, illegal fishing, and naval activities by its rivals. Lacking modern frigates, patrol vessels, or anti-submarine warfare capabilities limit Morocco's ability to project power at sea and effectively counter maritime threats. To address this gap, Morocco must prioritize future investments in naval assets, such as acquiring multi-purpose frigates with anti-submarine and air defense capabilities, and develop a maritime strategy. While it's true that recent modernization efforts have focused more on land and air forces, Morocco has been conducting naval exercises, such as NATO's Flotex 2025, to enhance its maritime readiness. Therefore, while naval development may lag behind other domains, it's an area of active investment.

FORESIGHT

Morocco's strategic defense investments establish a solid foundation for securing its sovereignty and asserting its regional leadership, but the evolving nature of threats requires a forward-looking approach to ensure comprehensive security. Looking toward the next decade, Morocco is poised to orient itself toward strengthening its naval capabilities and developing expertise in hybrid warfare, particularly in cyber operations, to fill gaps in its defense architecture and counter emerging challenges. Morocco's naval domain is critical for protecting its exclusive economic zone (EEZ), securing commercial routes, and countering threats like maritime trafficking and rival naval activities. Morocco could invest in enabling the Royal Moroccan Navy's ability to project power at sea and protect its waters and underwater infrastructure, such as its sovereign internet cables. Simultaneously, the emergence of hybrid threats, such as cyberattacks against critical infrastructure, necessitates a robust cyber army. Morocco could establish a dedicated cyber command, leveraging its capabilities with a growing technology sector, to train specialists in cyber operations. Collaborating with key allies like NATO could accelerate this development, enabling Morocco to counter disinformation campaigns, protect its digital borders, and respond to adversarial destabilization attempts. This dual focus on naval and cyber capabilities would position Morocco as a versatile multi-domain power, capable of defending its sovereignty across land, sea, and cyberspace, while strengthening its role as a regional security leader in an increasingly complex geopolitical landscape.

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