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# **Opportunities for Mississippi from Defense Exports to Morocco**

**May 2020**

**Youssef TAMIMOUNT**

**PROMOTING INNOVATION,  
DIVERSIFICATION AND COOPERATION IN  
THE MISSISSIPPI DEFENSE COMMUNITY**



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# Acknowledgements

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Third, I am extremely grateful to my parents, Mohamed and Nadia, for their love, support to make me a better person, preparing me for the future and encouraging me to follow my dreams. I am very thankful to my sister Khaoula and brother Mehdi for their advice and valuable support. Last but not least, I would like to wish good health to my sister-in-law Hind as she is welcoming our lovely baby Nelia.

# The Author

**Youssef Tamimount** is a Moroccan MBA student and also a former tennis player at the University of Southern Mississippi. He lived in four different countries in different continents while he is studying (Morocco, France, Thailand, and the United States of America). When he was in high school, Youssef Tamimount was among the top tennis players of its nation in his category; Hence, in 2011, he was very fortunate to have great support from his parents, who decided to send him to Paris to combine between his studies and his passion. In 2013, he reached the 260th place in the Junior World Ranking, 5th in Africa and 1st in Morocco.

Youssef Tamimount developed an early interest in economic development as he lived in four different countries and has been visiting multiple ones as a tennis player. Having a multicultural background helped him to have a curious and critical mind towards the economic development of each country. After a bachelor's degree in Economics, Management, and Law at the Pantheon-Sorbonne University (Paris 1) in 2018, he did an internship at the Presidency of the Moroccan Government as a junior consultant. During this internship, he found his vocation while he was learning about the economic challenges that a country can face to pursue its development. In 2019, he decided to join the University of Southern Mississippi for an MBA and also to play in the Southern Miss Tennis Team during the season 2018/2019.

This report represents a dream of him to have his report published and to contribute to the enhancement of his native country, Morocco, by developing opportunities that could be a catalyst to its development.

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# Executive Summary

Mississippi can benefit from attracting U.S. defense export to Morocco to use the Strategic Port of Gulfport. The idea of rerouting Moroccan acquisition of U.S. Defense equipment to the Strategic Port of Gulfport is based on the strong partnership that the United States and Morocco had through the past and also the recent U.S. Defense acquisition made by the Moroccan Army in 2019 with a value of \$10.3 billion.

Morocco is a major ally for the United States in the North African region. This strategic collaboration spanned several years took place in essential sectors, such as the military sector. Morocco is a military ally of the United States since the First World War when the two countries were fighting alongside and developed a close relationship throughout the time. This strong relationship made the United States the main Moroccan supplier in terms of arms for many years and represented 91% of Moroccan military imports between 2015 and 2019. The U.S. Defense exports to Morocco are shipped through several ports distributed in several regions of the United States. In 2019, most of the U.S. Defense exports were made from ports located on the East Coast of the United States, such as Philadelphia in Pennsylvania, Charlotte in North Carolina, and Washington in District Columbia.

This report shows that the Port of Gulfport can be among these ports if there is support from the state's institution, such as Mississippi Defense Initiative. This support will enable the Port of Gulfport to give many incentives to the Kingdom of Morocco, so they can consider the opportunity of rerouting their shipment through Gulfport. As discussed in the discussion part, the recommended actions are the following:

- Providing assistance in terms of management to Moroccan ports and especially military ports, such as the Military Port of El Ksar Sghir;
- Setting up meetings and visits to show in what the Port of Gulfport can be a good option for U.S. Defense exports to Morocco;
- Sharing experience and knowledge with the Moroccan authority in terms of Military industrialization;

- Training program to executive ports staff;
- Training programs to the military personal and engineers;
- Offering affordable and advantageous transport costs;
- Short delivery times and;
- Encourage non-military shipping such as agricultural products, chemicals, petroleum & coal product, paper to strengthen the relationship between the state of Mississippi and Morocco.

# Introduction

The United States of America and the Kingdom of Morocco are allies and have had a strong dynamic since 1777. Such broad cooperation between the two countries found its foundation in 1786 when the United States Congress ratified the peace and friendship treaty between the United States and Morocco. The United States considers Morocco as a recognized regional leader in the promotion of religious coexistence and interreligious dialogue. Over time, this historical legitimacy has continuously been reinforced. In 2006, the two countries signed a free trade agreement showing American support concerning the significant economic and political reforms in Morocco by eliminating trade barriers and improving U.S. exports to Morocco. On the security plan, Washington highlighted the contribution of Morocco, which plays a leading role in security and an essential ally in the global fight against terrorism in Africa, under the leadership of King Mohammed VI.

Hence, the United States of America developed a strong military relationship with Morocco and made it one of its strategic allies in the region. This exemplary cooperation manifests itself in the "African Lion" exercise, considered one of the most important military exercises in the world. This partnership is also strengthened by the exports of military equipment to the Kingdom, which is one of the biggest importers of U.S. arms and equipment in Africa. The importance given to the military field made Morocco request many military acquisitions that have been approved by the U.S. State Department during the last years. These acquisitions are aiming to empower Moroccan Defense and be able to face the eventual challenges in the future. Most of these acquisitions will be delivered in 2024.

The investigation made in this report is conducted through researches made on USITC Database, U.S. trade numbers, The Ministry of Moroccan Defense, military reports, and other articles. The findings will enable us to discuss the feasibility concerning the exports of U.S. Defense equipment going through the Port of Gulfport in Mississippi to Morocco, especially after becoming the nation's 17th strategic port in November 2015.



# The Maghreb

The Maghreb is a region located in North Africa, the western part of the Arab world corresponding to the Arab-Berber cultural space, bordered to the north by the Mediterranean Sea, to the west by the Atlantic Ocean and to the south by the Sahara Desert. The Maghreb has a total area of more than six million square kilometers and is crossed by the Atlas chain for more than 2,000 kilometers. The countries forming the Maghreb region are Morocco, Algeria, Tunisia, Libya, and Mauritania (see Figure 1).

The Maghreb region is in the shadow of many other regions in the world. However, it contains countries among the largest importers of arms in the world, such as Algeria and Morocco. Military imports have significantly increased through time, especially during the last decade, which was known by the arrival of the Arab Spring; a challenging period for many countries in the North African region.

The Arab Spring is a set of widespread protests of variable scope and intensity, taking place in many countries of the Arab world starting from December 2010. During this period, several countries increased the budget devoted to defense. This change is due to the political instability that the region experienced for a few years and which still lasts for certain countries, like Libya. The combined defense purchases of the Maghreb region is significant and hold great potential in the future.

In this report, we will shed light on one of the five countries cited above, which is Morocco. Morocco is located at the intersection of Europe and Africa. This location makes Morocco a logistics and routing hub between Europe, sub-Saharan Africa and the Middle East

Figure 1: Location of the Kingdom of Morocco in the Maghreb region



Source: Geospatial at the Bureau of Transportation Statistics

Figure 2: Map of the Kingdom of Morocco



Source: Moroccan Map

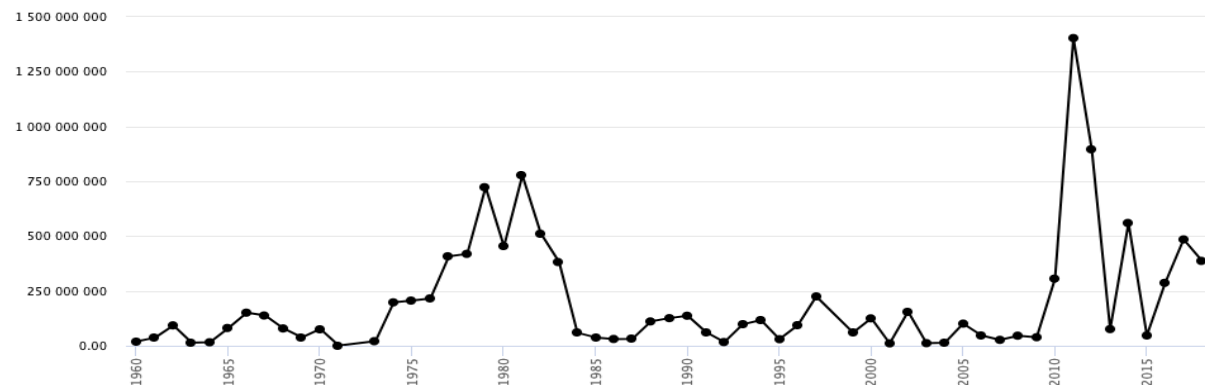
# Moroccan Military

The Kingdom of Morocco is a country of 35 million people located on the northwest coast of Africa. Morocco's gross domestic product (GDP) was \$119.04 billion in 2019, which is comparable to Mississippi's GDP, and represented 0.10% of the world economy. The Royal Armed Forces (FAR) constitute the military force of the Kingdom, and it is responsible for the defense of the country and the protection of its national interests. The King of Morocco is, according to the Constitution, the Supreme Chief of the Royal Armed Forces.

For Morocco, one of the main security challenges is the country's long-standing tension with Algeria that involves the Sahara, where it opposes Morocco over the Polisario Front. The last negotiations in Switzerland December 2018 to find a way out of this conflict had no results. The mandate of the United Nations Mission for the Organization of a Referendum in the Sahara has recently been extended for another year.

According to the Stockholm International Peace Research Institute (SIPRI), Morocco represents 1.1% of world imports, which is 15% of all African imports. It is the second-largest importer of weapons in Africa after Algeria. Morocco is also the 24th largest importer of major weapons in the world between 2014-2018. This country's number and situation showed a significant opportunity that can be harnessed by the state of Mississippi through defense exports.

*Figure 3: Military imports in Morocco in \$ USD*

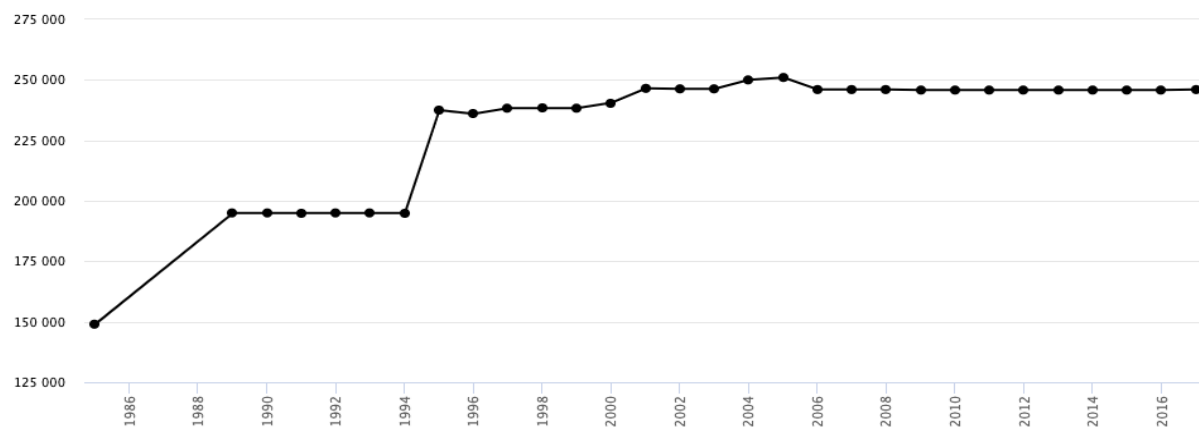


Source: World Bank

For 2020, the Moroccan government has decided to increase the budget allocated to the National Defense by almost 30% compared to 2019. The acquisition of new armaments and the increase in military staff costs are the main reasons for this rise. The Royal Armed Forces will create 5,000 budgetary positions that will be added to the 15,000 personal of national service already existing. Staff costs will increase from \$2.28 billion in 2019 to \$3.1 billion in 2020.

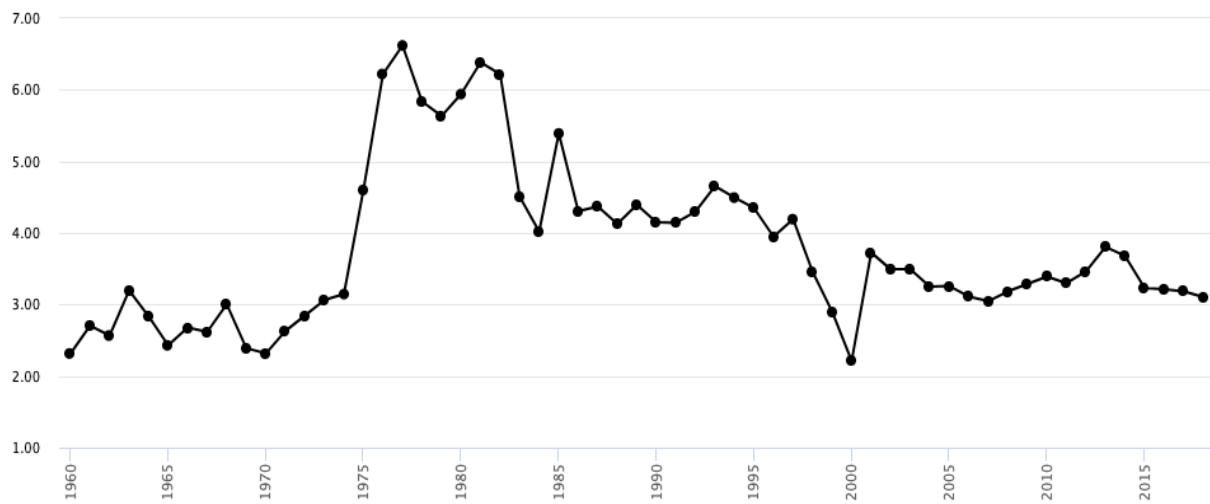
Thus, the **2020 budget** of the Royal Armed Forces will reach **\$4.25 billion** against \$3.3 billion in 2019 and will represent 4.5% of national GDP. The Ministry of National Defense is also authorized, if necessary, to use funds in advance from the commitment fund for the acquisition expenditure planned in 2021. The commitment funds have **\$10.35 billion** available. All these actions taken by the country show Morocco will improve its equipment and have a strong defense, which also means that the Kingdom of Morocco is a platform that can be exploited by the Mississippi Defense Initiative in terms of defense exports.

*Figure 4: Number of Moroccan Military Personal*



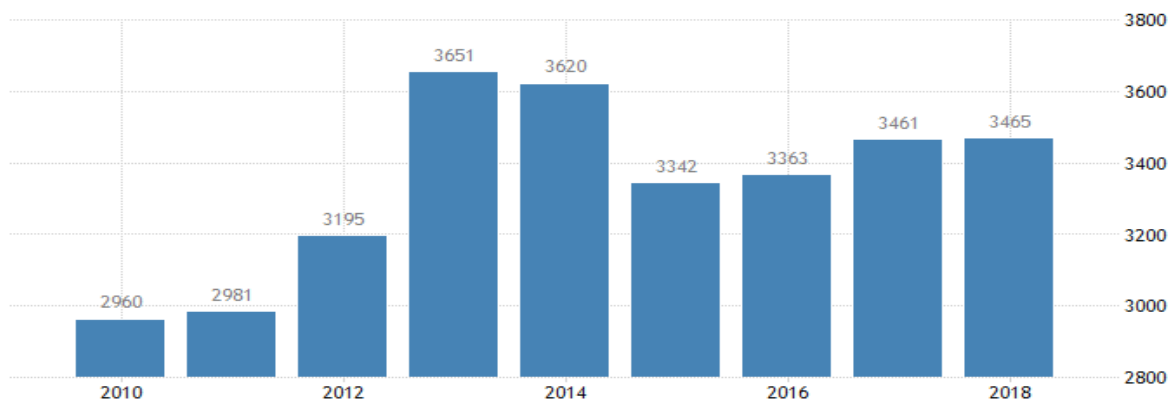
Source: World Bank

Figure 5: Moroccan Defense Spending (% of GDP)



Source: World Bank

Figure 6: Moroccan Defense Spending (USD Million)



Source: tradingeconomics

Morocco has maintained a massive budget to meet the challenges of the moment, such as scientific and military developments, as well as the perfection of the fields of security and defense. The aim of the Moroccan Military is to reach the objective of becoming the first military power in North Africa. To reach this objective, Morocco has established a five-year plan (2017-2022) called

**"Regional Supremacy"** through the modernization of all the military equipment of its different bodies (land, air, sea). A budget of **\$20 billion** is devoted to this strategic objective.

In 2020, Morocco is ranked **57th of 138** countries currently considered for the annual Global Fire Power review. The following tables show the breakdown concerning Moroccan Military Strength.

**Total aircraft strength** value includes Fixed-wing and rotorcraft platforms from all branches of service (UAV's are not included in the total). **Transports** value includes only fixed-wing aircraft while all rotorcraft are represented under the **Helicopters** value. 'Special-Mission' values do not include aerial tankers into account.

- **Airpower**

Total strength	Fighters	Dedicated attack	Transport	Trainers	Special Mission	Helicopters	Attack Helicopters
241	46	0	31	67	4	64	0

Source: GFP

**Tanks** value includes Main Battle Tanks (MBTs), light tanks, and tank destroyers. **Armored vehicle** value includes APCs, IFVs, MRAPs, and Armored Cars. **Rocket projectors** include only self-propelled forms.

- **Land forces**

Tanks	Armored Vehicles	Self-propelled Artillery	Towed Artillery	Rocket Projector
1,443	2,901	505	200	144

Source: GFP

In the Naval forces section, the value of the **total assets** includes all possible/available vessels, including auxiliaries, which are not showcased individually. **Aircraft Carriers' values** include traditional carriers as well as Helicopter Carriers. **Submarines' value** includes diesel-electric and nuclear-powered types.

- **Naval Forces**

Total Assets	Aircraft Carriers	Destroyers	Frigates	Corvettes	Submarines	Patrol	Mine Warfare
121	0	0	3	4	0	105	0

Source: GFP

The tables above show the country is involved in the improvement process of its military equipment, but there is still a significant potential of improvement to gain by The Royal Forces Army in terms of Airpower, Land Forces, and Naval Forces assets.

# Defense Purchases

Throughout the Cold War, the period during which Morocco's independence took place, the country became closer to the Western powers. The situation enabled Morocco to have good relations with the United States and European Union. The Kingdom turned to its Western allies, notably the United States and France to acquire military equipment since it has no military industry production.

In November 2019, the U.S. State Department cleared the Moroccan request about the upgrades of **162 Abrams tanks** for a value of \$1.26 billion. As part of 2020 budget, the acquisition of **36 units of AH-64 Apache attack helicopters and related equipment** (12 light transport helicopters, 24 tactical transport helicopters) for \$4.25 billion, **25 new F-16 fighter jets** for \$3.787 billion as well as the upgrades to the country's existing **23 F-16s** to the more advanced **F-16V Block 52+** configuration estimates at \$985.2 million, **25 Hercules recovery vehicles M88A2** for \$240 million, an **American Patriot Pac-3 surface-to-air missile system**, and **10,000 Colt M4 carbines rifles** have been approved by the U.S. Defense Security Cooperation Agency (DSCA) and will be delivered in 2024. In April 2020, the U.S. Defense Security Cooperation Agency also approved the Moroccan acquisition of **10 AGM-84L Harpoon Block II air-launched missiles** for \$62 million, in addition to **25 M88 Hercules armored vehicle** for \$239 millions and **12 Sikorsky S-70A-26**.

*Figure 7: Apache helicopter*





Figure 8: Sikorsky S-70A-26



Figure 9: F-16 Fighter



These acquisitions show the important collaboration between the United States and Morocco on the military level. This collaboration would be an excellent catalyst to exploit the possibility of shipping U.S. defense exports from the region of Mississippi to the Kingdom of Morocco.

Morocco has also concluded arms purchase contracts with France. These purchases have a value of \$440 million concerning the sale of **Caesar self-propelled artillery systems** for \$190 million and its ammunition for \$30 million and **terrestrial VL-Mica missiles** for \$220 million. Morocco is also planning to purchase submarines and has already consulted TKMS, Navantia, and Naval Group for the manufacturing part.

Morocco received 53% of its arms from the U.S. from 2014 to 2018. France, which is the world's third-largest arms exporter, represents 28% of the major arms that Morocco imported in the same period. The main suppliers for Moroccan Military are:

*Table 1: Main Suppliers for Moroccan Military between 2014-2018*

Country	% of exports (to Morocco)
United States of America	53%
France	28%
Netherlands	17%
Italy	2%

Source: GRIP Report

# Moroccan-U.S. Military Relations

Based on the information provided by the Moroccan American Center for Policy on behalf of the Kingdom of Morocco, Morocco and the United States have had a special relationship since 1777; the Kingdom was the first nation to acknowledge **United States independence**, only a year and a half after the U.S. Declaration of Independence was issued, and opened its ports to American ships. In 1786, Morocco concluded a peace and security treaty, one of the longest unbroken ties in U.S. history. On the other hand, the United States supported **Morocco's independency** in 1956. The two countries have shared concerns such as security, political & economic issues, and a sustainable environment. These are the reasons for which the two countries are consulting each other and collaborating permanently.

Morocco has **fought alongside** the United States throughout American history. The two countries were always **allies in wartime**. During the **1st World War**, Moroccan soldiers fought alongside Allied forces, and in 1917 and 1918, Moroccan soldiers fought alongside U.S. Marines at Chateau Thierry, Mont Blanc, and Soissons. In the **2nd World War**, Morocco national defense supported Allied Forces and aided American and British troops in the region; In January 1943, President Franklin Roosevelt, British Prime Minister Winston Churchill, and Free French Commander Charles de Gaulle spent four days at the Anfa Hotel in Casablanca to plan the Allied strategy for the next phase of **World War II**. During **the Cold War**, an agreement was signed by Morocco and the U.S. to allow American forces to access and transits rights to Moroccan Air Force bases. Morocco was also the only Maghreb member in the U.S. coalition during the **First Gulf War**. The Kingdom is also an active member of the **Global Counterterrorism Forum** and supported the **U.S. War in Iraq and Afghanistan**.

The United States and Morocco have been cooperating since the 1990s by participating in the largest joint training in Africa called "**Operation African Lion**" with thousands of troops. Morocco has also developed a partnership with the **Utah National Guard** in 2003. In 2004, President George Bush named Morocco a **major non-NATO ally**, and it was the first Maghreb country to achieve this status. According to the strategic position and the importance of the country in Africa, Morocco joined the **Trans-Sahara Counterterrorism Partnership**, which is a U.S.

government-funded and implemented effort designed to counter extremist acts in the Sahara-Sahel region. The United States also provides help to maintain aging U.S. equipment, boosting the maritime surveillance, procure transport and logistics equipment, and upgrade aerial surveillance through the **Foreign Military Financing (FMF) initiative**.

Concerning the academic side, Moroccan students are sent annually to **Professional Military Education** classes at U.S. services through a program called the **International Military Education and Training** program. Economically, the two countries signed a \$697.5 million compact with the **Millennium Challenge Corporation** to reduce poverty and increase economic growth. This collaboration was also strengthened by The United States-Morocco **Free Trade Agreement** that entered into force on **January 1, 2006**, eliminating duties on more than 95% of all goods and services. In addition to key U.S. export sectors gaining immediate duty-free access to the Moroccan market, the agreement includes commitments by Morocco for increasing regulatory transparency and the protection of intellectual property rights.

All the **history** and the **five programs** listed above show the active collaboration that Morocco and the United States have developed through time. This relationship could be used as an incentive for potential exports, especially, the ones made by the Mississippi armament manufactories through the Port of Gulfport in Mississippi.

# U.S.- Morocco Trade (Import & Export)

Morocco is ranked **63<sup>rd</sup>** in global trade value in 2019, with \$5.06 billion. Exports totaled \$3.48 billion, and imports totaled \$1.58 billion, which is a surplus of \$1.9 billion. In 2019, the top commodity's exports from the United States to Morocco were **civilian aircraft parts; gasoline and other fuels; petroleum gases and other gaseous hydrocarbons; coal and briquettes; and acyclic hydrocarbons**, respectively. This commodity represents **67.16% of total export** to Morocco. In terms of the commodities that the United States imports from Morocco, **miscellaneous mineral or chemical fertilizers** are the most imported, **oranges, grapefruit, other citrus** are in the second position and **miscellaneous vegetables not frozen** are in the third place followed by **caviar, caviar substitutes, other prepared fish and insulated wire, cable**, which is **58.76% of all inbound shipment**.

*Table 2: Top U.S. Exports to Morocco, 2019*

Rank	Commodity	2019
1	Civilian aircraft, part	\$1.04B
2	Gasoline, others fuels	\$632M
3	Petroleum gases, other gaseous hydrocarbons	\$291M
4	Coal, briquettes	\$233M
5	Acyclic hydrocarbons	\$144M
6	Soybean oilcake, others solid residue, not ground	\$107M
7	Miscellaneous machines, parts	\$98M
8	Sugar and starch residues	\$68M
9	Defense-related Aircraft, Parts	\$58.6M
10	Plastics.	\$56.7M
<b>Total all exports</b>		<b>\$3.48B</b>

Source: U.S.trade numbers

Seaports represent **77%** of the global port distribution concerning the Moroccan-U.S. trade. The main seaport exports are **gasoline, other fuels** with 35%; 27% are **civilian aircraft parts**; and **petroleum and other gaseous hydrocarbons** represent 11%. On the other hand, airport exports represent **23%** of the global port distribution. The statistics show that 49% of the airport exports are

civilian aircraft parts, 14% for miscellaneous machines parts, and 3.9% for insulated wire and cable.

*Table 3: Top U.S. Imports from Morocco, 2019*

Rank	Commodity	2019
1	Misc. mineral or chemical fertilizers	\$106M
2	Oranges, grapefruit, other citrus	\$40.6M
3	Motor vehicles parts	\$25.6M
4	Caviar, caviar substitutes, other prepared fish	\$18.9M
5	Misc. vegetables, not frozen	\$10.5M
6	Women's or girls 'suits, not knit	\$9.94M
7	Defense-related aircraft, parts	\$9.79M
8	Estimates of low-value imports	\$7.35M
9	Phosphatic fertilizers	\$7.02M
10	Insulated wire, Cable	\$6.43M
<b>Total</b>		<b>\$341M</b>

Source: U.S. Trade numbers

In 2019, 39.28% of Morocco-U.S. trade were handled through **5 main seaports**: the **Port of New Orleans** with 16% of all U.S. trade with Morocco, followed by the **Port of Southern Louisiana-Gramercy**, the **Port of Houston** with 15%, **Port of Baltimore** with 11%, and the **Port of Newark** with 5.7%.

*Table 4: Top trading U.S. Ports to Morocco, 2019*

Rank	Port	2019
1	Port of New Orleans	\$850M
2	Port of Everett, Washington	\$342M
3	Port of Southern Louisiana, Gramercy, St James Parish	\$292M
4	Port of Houston	\$261M
5	Port of Charleston	\$243M
6	Port of Baltimore, MD	\$223M

7	Cleveland's Hopkins international airport, Ohio	\$221M
8	Port of Texas city, TX	\$203M
9	Norfolk/Mobile/Charleston	\$196M
10	John F. Kennedy International Airport	\$170M

Source: U.S. Trade numbers

Four of the seven main seaports used for the Morocco-U.S. trade are located in the southern part of the United States; however, none of these seaports are a strategic port. The Port of Gulfport in Mississippi is a strategic seaport located between these seaports and could be utilized for U.S. defense exports

# Manufacturing Side of U.S. Defense Exports to Morocco

Recently Morocco has signed several deals with U.S. defense contractors. The first one is upgrades of **162 Abrams tanks** turning the older design into one of three variants: the baseline **M1A1**, the **M1A2M** design with a commander's independent Thermal viewer, or the **M1A1 U.S. Marine corps version**. The prime contractor will be **General Dynamics** Land Systems in **Sterling Heights, Michigan**. Refurbishment work will be performed at **Anniston Army Depot** in **Anniston, Alabama** and the **Joint Systems Manufacturing** Center in **Lima, Ohio**. This sale of M1A1 tank enhancements would contribute to the modernization of Morocco's tank fleet, enhancing its ability to meet current and future threats. These tanks will contribute to Morocco's goal of updating its military capability while further enhancing interoperability with the United States and other allies.

The acquisition of **36 AH-64E Apache** attack helicopters armed with Hellfire and AIM-92H Stinger missiles besides Advanced Precision Kill Weapon System (APKWS). This sale could be done as an offset agreement. In case there is an offset agreement, it will be defined in negotiations between the purchaser and the contractors. The prime contractor involved in this program will be **Boeing Company**. Implementation of this proposed sale will require the assignment of eleven U.S. government personal and three contractors representatives to Morocco as part of the Technical Assistance Fielding Team and Field Service Representatives.

The request of the **25** new **F-16** made by the Moroccan defense includes a continuation of sustainment support to its current **F-16** fleet to include the following non-MDE components: F-16 support equipment, spares and repair parts; personal training and training equipment; publication and technical documentation; munitions support and test equipment, contractor engineering, technical and logistical support service; and other related elements of logistics and a program support. The principal contractor will be **Lockheed Martin**. The same contractor will be in charge of delivering **12 Sikorsky S-70 A-26** and an **American Patriot Pac-3 surface-to-air missile**



**system** to Morocco by **2024**. **BAE Systems** will be in charge of the **25 M88A2 Hercules vehicles**; the plant in charge of the manufacturing part will be in **York, PA**

*Table 5: Recent Moroccan U.S. Defense Acquisitions*

Manufacturer	Type	Year	Volume	Place Mfg
Lockheed Martin- (Sikorsky Aircraft)	Sikorsky S-70A-26	2024	12	Stratford, CT
Lockheed Martin	F-16		25	Greenville, SC
Boeing	Apache		36	Mesa, AZ
Lockheed Martin-Fire Control	American Patriot Pac-3 surface-to-air missile system		1	Andover, MA
				Dallas, TX
Colt’s	M4		10,000	Hartford, CT
BAE Systems	M88A2 Hercules	-	25	York, PA
Boeing	AGM-84L Harpoon Block II Air Launched missiles	-	10	St.Louis, MO
General Systems	Abrams Tanks	-	162	Sterling Heights, MI

*Figure 10: American Patriot Pac-3 surface-to-air missile system*



*Figure 11: M88 Hercules armored vehicle*



*Figure 12: AGM-84L Harpoon Block II Air Launched missiles*



# Ports used for U.S. Defense Exports to Morocco between 2015-2019

International transfer of major weapons during the 2015-2019 period increased by 5.5% compared to 2010-2014 (SIPRI). Morocco has become the **31st** importer of weapons in the world. The weapons imported between 2015 and 2019 from the United States represented **91%**, followed by France 8.9%, and the United Kingdom 0.3%. The tables below represent the U.S. defense exports to Morocco between 2015-2019 and the ports used. The numbers are from the USITC database.

The most used port for the shipment of the parts of aircraft and helicopter is the **Port of Philadelphia, PA**, which represents **76%** of the global shipment made in 2019 (see Table 6). The Port of **Norfolk, VA**, is in second position with **9%**, while the Port of **New York, NJ**, is in third position with **4%**.

*Table 6: Ports used for Exports of Airplanes/Helicopters Parts use in Military Aircraft (Excludes propellers, rotors, undercarriages and parts) **Numbers in \$1,000***

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Charleston, SC	573.92	-	-	-	92.72
Chicago, IL	16.87	26.73	36.73	-	-
Cleveland, OH	343.56	-	10.40	15.31	525.22
Detroit, MI	-	-	46.78	-	103.27
Houston-Galveston, TX	320.68	-	-	-	366.70
Los Angeles CA	2,60	196.13	2.52	-	-
Miami, FL	4.86	5.43	14.25	-	865.83
Milwaukee, WI	-	87.77	18.82	-	-
New Orleans, LA	-	-	-	-	16.99
New York, NY	10932.07	3670.99	3454.80	7644.52	2142.10
Norfolk, VA	5044.59	4353.99	6379.05	9439.17	5179.58
Philadelphia, PA	4953.85	14462.80	8901.07	9422.88	44409.44
Savannah, GA	-	19.81	-	-	-

Seattle, WA	-	-	-	-	6.68
<b>Total</b>	<b>22196.93</b>	<b>22835.97</b>	<b>24878.04</b>	<b>40563.51</b>	<b>58507,14</b>

In 2019, military wearing apparel of all types and materials of all types (including footwear and headwear) were shipped mainly through **the Port of Philadelphia** with a value of **\$20,520** (see Table 7).

*Table 7: Ports used for the exports of military wearing apparel of all types and materials of all types and materials, including footwear and headwear. **Numbers in \$1,000***

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
New York, NY	325.910	26.310	189.100	-	-
Philadelphia, PA	7.970	-	-	-	20.520
Savannah, GA	8.93	-	-	-	-
Washington, DC	-	-	43,990	56.540	-
<b>Total</b>	<b>342.81</b>	<b>26.310</b>	<b>233.090</b>	<b>56.540</b>	<b>20.520</b>

The undercarriages and parts that are used in military aircraft are mostly shipped from the port of **Washington, DC** (see Table 8). A small quantity is also shipped through **New York, NJ**.

*Table 8: Ports used for the exports of undercarriages and parts, for use in military aircraft. **Numbers are in 1,000 USD***

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Milwaukee, WI	-	-	7,94	-	-
New York, NY	64,16	244,57	1237,62	-	2,66
Norfolk, VA	-	-	-	3,25	-
Philadelphia, PA	-	-	15,88	-	-
Washington, DC	25,21	-	86,93	744,10	98,35
<b>Total</b>	<b>89,37</b>	<b>244,57</b>	<b>1348,37</b>	<b>747,36</b>	<b>101,01</b>

A value of **\$13.916 million** parts and accessories for military rifles of heading was shipped through the **Port of Washington, DC** (see Table 9).

*Table 9: Ports used for the exports of parts and accessories for military rifles of heading.*

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Los Angeles, CA	-	-	-	3.892 M	-
Washington, DC	-	-	-	-	13.916M
<b>Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3.892M</b>	<b>13.916M</b>

**The Port of Washington, DC**, is the main port for exports of propellers and rotors used for the military aircraft, with \$16,500 global value of shipments from 2019 (see Table 10).

*Table 10: Ports used for the exports of propellers and rotors, for use in military aircraft. **Numbers in \$1,000***

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
New York, NY	31.140	56.910	144.860	-	-
San Francisco, CA	-	-	15.130	-	-
Washington, DC	-	-	248.440	53.440	16.500
<b>Total</b>	<b>31.140</b>	<b>56.910</b>	<b>408.430</b>	<b>53.440</b>	<b>16.500</b>

Military rifles shipped in 2019 passed through three ports: **Port of Charlotte, NC**, **Port of Washington, DC**, and **Port of Charleston, SC**. More than **60%** of the shipment went through **Port of Charlotte**, while the **Port of Washington** represents **34%**, and **6%** for the **Port of Charleston, SC** (see Table 11).

*Table 11: Ports used for the exports of military rifles. **Numbers in \$1,000***

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Charleston, SC	-	-	-	-	38.110
Charlotte, NC	-	220.880	463.660	-	525.490
Chicago, IL	-	-	153.970	-	-
Washington, DC	-	-	-	-	275.610
<b>Total</b>	-	<b>220.880</b>	<b>617.630</b>	-	<b>839.200</b>

The **Port of Charlotte, NC**, shipped more than **70%** of the machine guns exported to Morocco in 2019, while **30%** was shipped through the **Port of Charleston, SC** (see Table 12).

*Table 12: Ports used for the export of machine guns. **Numbers in \$1,000***

District	Year 2019
Charleston, SC	103.920
Charlotte, NC	263.890
<b>Total</b>	<b>367.810</b>

The **Port of Charleston, SC**, exported 95% of the military weapons and other arms of heading, while **5%** was shipped through the **Port of New York, NY** (see Table 13).

*Table 13: Ports used for the exports of military weapons and other arms of heading. **Numbers are in \$1,000.***

District	Year 2019
Charleston, SC	269.440
New York, NY	15.960
<b>Total</b>	<b>285.400</b>



All military shotguns were exported to Morocco through the **Port of Charlotte, NC**, with a value of **\$73.541 million** (see Table 14).

*Table 14: Ports used for the exports military shotguns.*

District	Year 2019
Charlotte, NC	73.541
<b>Total</b>	<b>73.541</b>

Rocket launcher flamethrowers, Grenade launchers, nor Torpedo tubes has been shipped in over two years. The last shipment was made in 2017 from the **Port of Charlotte, NC** (see Table 15).

**Table 15:** Ports used for the exports of Rocket launchers flamethrowers, Grenade launchers, Torpedo tubes and similar projector. **Numbers in \$1,000**

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Charlotte, NC	-	22.800	723.200	-	-
Dallas-Fort Worth, TX	-	10.000	-	-	-
<b>Total</b>	-	<b>32.800</b>	<b>723.200</b>	-	-

The parts and accessories of military artillery weapons had not shipped in the last two years. The last shipment was made in 2017 from the **Port of Norfolk, VA** (see Table 16).

*Table 16: Ports used for the exports of Parts and accessories of military artillery weapons. Numbers are in 1,000 USD*

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Charleston, SC	156.030	-	-	-	-
Norfolk, VA	-	-	120.670	-	-
<b>Total</b>	<b>156.030</b>	-	<b>120.670</b>	-	-



No shipment of self-propelled artillery weapons and military weapons other than revolvers & pistols & arms of heading have been made during the last two years. The most recent was in 2017 through the **Port of Charleston, SC**. The shipment value was \$41.290 (see table 17).

*Table 17: Ports used for the exports of self-propelled artillery weapons (Guns, Howitzers and Mortars), Military weapons other than revolvers & Pistols & Arms of heading. **Numbers are in \$1,000***

District	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
Boston, MA	-	31.780	-	-	-
Charleston, SC	63.050	-	41.290	-	-
<b>Total</b>	<b>63.050</b>	<b>31.780</b>	<b>41.290</b>	<b>-</b>	<b>-</b>

According to the findings from the tables above, U.S. defense exports are shipped through different ports based on the types of exports and the year shipped. The 2019 findings show that **50%** of U.S. defense exports; especially **small weapons** such as military rifles, shotguns and machine guns were shipped to Morocco from the **Airport of Charlotte, NC** due to their small volume. The remaining exports were shipped through **Philadelphia, PA**, with **30%**, while **10%** were shipped through **Washington, DC**. These three ports are located on the east coast of the United States, and it could be explained by the air cargo capabilities and the presence of the biggest plants of armament manufacturers in this area.

# Mississippi Exports to Morocco

Exports between Mississippi and Morocco varied considerably during the last decade, especially between 2014 and 2019. The exports decreased by **40%**, which is **\$10.4 million** between 2014 and 2015, dropping from \$26.1 million to \$15.7 million. The decline did not stop and brought the exports between Mississippi and Morocco to \$5 million with a **69%** decrease which is a loss of more than **\$10.7 million** between 2015 and 2016. The period between 2016 and 2017 will see a **50%** increase corresponding to a **\$2.7 million** and reached \$7.7 million. Between 2017 and 2018, exports will reach the lowest level with a total export value of \$800,749 decreasing by almost \$7 million, which is more than **89%** before regaining \$6.7 million between 2018 and 2019.

*Table 18: Main Mississippi exports to Morocco between 2014-2019*

Item	2014	2015	2016	2017	2018	2019
<b>Agricultural products</b>	\$21,001,506	\$12, 882,426	-	-	-	-
<b>Petroleum &amp; Coal products</b>	\$1,552,031	-	-	\$3,203,767	-	\$3,150,251
<b>Chemicals</b>	\$2,484,319	\$2, 256,800	\$3,595,828	\$3,868,320	\$110,468	\$126,238
<b>Transportation equipment</b>	-	\$102,904	\$137,303	\$192,314	\$368,463	\$1,425,364
<b>Textile Mills</b>	-	-	-	-	\$4,750	\$1,380,738

products						
<b>Paper</b>	\$802,297	\$42,334	\$538,772	0	0	\$731,967
<b>All Others</b>	\$276,271	\$400,999	\$731,877	\$447,034	\$317,068	\$833,123
<b>Total</b>	<b>\$26,116,424</b>	<b>\$15,685,463</b>	<b>\$5,003,780</b>	<b>\$7,711,435</b>	<b>\$800,749</b>	<b>\$7,647,681</b>

Source: tse.export.gov

In 2014, exports between the state of Mississippi and Morocco were at their highest level, reaching \$26 million. More than **80%** of these exports were **agricultural products** with a value of \$21 million, while **chemicals** represented **9.5%** of total exports with a value exceeding \$2.4 million. **Petroleum & coal** products came third with \$1.6 million, representing **5.9%** of the total exports between the state of Mississippi and Morocco in 2014.

*Table 19: All Merchandise Exports from Mississippi to Morocco in 2014*

Products	Value (\$)	Percent
Agricultural products	\$21,001,506	80.4%
Chemicals	\$2,484,319	9.5%
Petroleum & Coal products	\$1,552,031	5.9%
Paper	\$802,297	3.1%
All others	\$276,271	1.1%
<b>Grand total</b>	<b>\$26,116,424</b>	<b>100%</b>

In 2019, **petroleum & coal products** were representing **41.2%** of total exports with a value of \$3.2 million. **Transportation equipment** was second with a value of \$1.5 million, which is **18.6%** of the exports made in 2019. **Textile Mills products** in 2019 were about \$1.4 million with **18.1%**, while **paper** exports represented **9.6%** with a value of \$732,000.

*Table 20: All Merchandise Exports from Mississippi to Morocco in 2019*

Products	Value (\$)	Percent
Petroleum & Coal products	\$3,150,351	41.2%
Transportation equipment	\$1,425,364	18.6%
Textile mills products	\$1,380,738	18.1%
Paper	\$731,967	9.6%
All others	\$959,361	12.5%
<b>Grand total</b>	<b>\$7,647,781</b>	<b>100%</b>

The tables above represent the various commercial exchanges carried out between the state of Mississippi and the Kingdom of Morocco during the last six years. This exchange shows the close collaboration that is reinforced by the free trade agreement signed by the two countries. This collaboration represents a possibility of extending trade between Mississippi and Morocco, even at the military level.

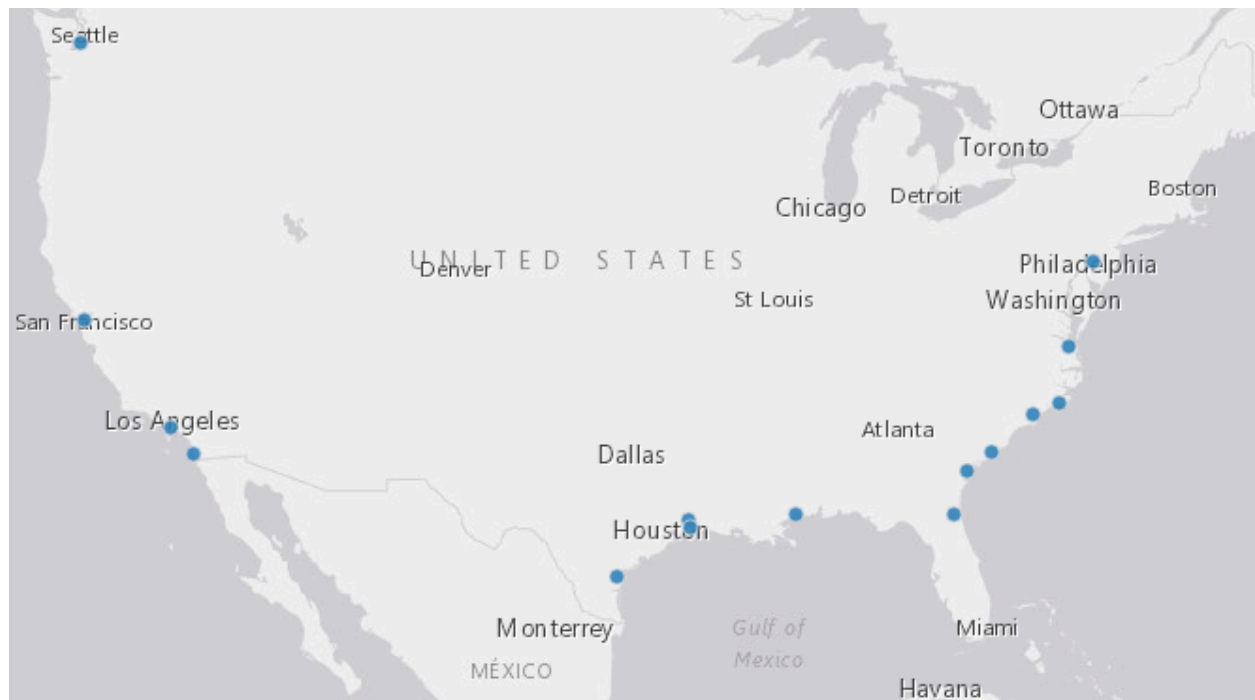
# The Strategic Port of Gulfport

A port is designated as a strategic port, if its capacity, and capability meets the requirements set by America's national security. Once these requirements are met, they will allow America to handle any contingency affecting national security. In a strategic port, the **sea-cargo based needs to exceed 95%** of the total required military logistics flow for sustained operations in each defined war risk /major regional crisis theater. It should also be able to **support major force and materiel deployments** in times of war and national emergency, based on their proximity to deploying military units and their transportation links close to those units, and varying other capabilities the DoD has deemed necessary. A strategic port can be either a commercial or military port. There are currently **22 strategic ports** (17 commercial and 5 military); Port of Gulfport is one of the U.S. strategic ports.

The Port of Gulfport is a port strategically located on the Gulf of Mexico in Gulfport, Mississippi, with easy access to open ocean waters via a short 18-mile ship channel that is maintained at **36 feet with a \$570 million restoration and expansion project**. The military aviation installation and the civilian airport distance from the shipping port are less than 5 miles. Gulfport within 400 miles sits within the largest concentration of department of defense facilities anywhere in the country. The Port of Gulfport is also considered as a perfect location for the military, knowing its proximity with **Stennis Space Center, the Seabee Base, Keesler Air Force Base, and Camp Shelby**, which is the second-largest joint forces training facility.

The Port of Gulfport, as a strategic port, is also handling some of the foreign military sales (FMS). One of the FMS that is shipped through the Port of Gulfport is **the V-22 B Block C Osprey aircraft** made by **Bell Helicopter in Amarillo Assembly Center, TX**, and it is shipped to **Japan** through the Port of Gulfport. The V-22 B Block C Osprey aircraft is included in the numerous acquisitions made by Japan to succeed in the country's five-year-mid-term defense program, and it will also increase the interoperability with the United States.

*Figure: Map of the US Strategic ports*



Source: Geospatial at the Bureau of Transportation Statistics

# PEST Analysis of Morocco

- **Political**

Politically, Morocco is part of a constitutional monarchy with an elected parliament. Executive power is shared between the government and the King. Legislative power is shared between the government, and the two chambers of parliament, the House of Representatives and the House of Councilors. The Justice and Development Party has been in command of the government since November 2011, forming a coalition with other political parties such as RNI, MP, UC, USFP, PPS.

While its neighbors had to fight and go through several violent protests in 2011, Morocco has managed to find a way out from the storm of the Arab Spring without having any impact on its economic or political side. During this period, the King of Morocco acted quickly and productively towards the situation by announcing several changes and reforms in the constitution. Hence, these reforms will carry a positive political change. Also, in time of major crisis such as the COVID-19 one, the Moroccan political system led by the King Mohamed VI, is considered as an example all over the world in terms of management and political leadership.

Morocco is a stable North African monarchy with a good business climate compared to other countries in the region. The country has a moderate level of political risk and was able to answer globally to people's claims during critical moments. Thanks to these actions, Morocco was able to preserve foreign investor confidence. The interaction between the regime and Moroccan citizens was positive, and, from there, the smooth running of the institutions was never jeopardized, and the change of government took place through the democratic process of the elections. The status of the Monarchy was never questioned by any political party or even by the protesters since this institution remains above political debates and is the subject of popular consensus.

- **Economic**

Over the past decade, the country has experienced remarkable economic stability by carrying out broad structural reforms. The Kingdom of Morocco has significant assets suggesting high results in terms of growth. These assets are: privileged geographic position, inflation is under control, price stability, the reduction of public debt, a strong financial system, improvement of infrastructure, education reform, and revival of tourism and privatization. The country also has a positive image with international risk rating agencies, which recognize its political and social stability. Morocco has managed to accelerate its pace of growth after two decades of relatively weak growth, thus making it possible to almost double its GDP per capita and reduce the gap in terms of living standards with the countries of southern Europe. Also, Morocco's per capita income started to grow faster in the early 2000s after several major institutional reforms.

Building on these advances, Morocco has a legitimate ambition to achieve the status of a high-middle income economy and to accelerate its economic development, catching up with the advanced countries. To this end, major structuring projects have been carried out or are in the process of being carried out, including the African Port of Tanger-Med, airports, high-speed trains, railways, the highway network, and a series of ambitious sectorial strategies covering all sectors of the economy: agriculture and fishing, energy and mining, public works, manufacturing industries and services, tourism, and information and communication technologies (ICT's). A network of ecosystems revolving around integrated industrial projects is emerging around the promotion of the exploitation of phosphate, the food industry, the pharmaceutical industry, the automobile industry, the aeronautics and other new global trades in Morocco.

The Kingdom launched a vast project of economic modernization program (**Industrial Acceleration Plan 2014-2020**) to attract more Foreign Direct Investment. This program will be extended with a **second phase between 2021-2025**. Industrial zones were created as well as tax exemption to encourage foreign investors to set up in the Kingdom, especially in the northern region "Tangier-Tetouan-Al Hoceima" more precisely in Tangier. In the automotive sector, Morocco has become the leading exporter in Africa. The Regional Investment Centers have been created since 2002, aiming to decentralized investment management. The objectives of these



centers are to encourage investment at the regional level and to help promote the potential of regional territories.

Morocco has also made significant progress in "**Doing Business**" by being ranked **53<sup>rd</sup>** out of 190 economies by the World Bank in Doing Business 2020 ranking. This progress is a result of a series of major reforms made in order to integrate the 50 best economies in the world in terms of improving the business climate by 2021. Some of these reforms are the protection of investors, the establishment of transparency and good governance and also dealing with construction permits easier by improving its online platform making it possible to apply for and obtain certificates of conformity online. The country also stood out in terms of tax reduction and promoting e-payment at ports as well as streamlining paperless customs clearance, and extending port hours of operation. Quantum Global ranked Morocco as the most attractive country for foreign investment in Africa, in sectors as information and communication technology (ICT's), energy, infrastructure, and tourism (**Africa Investment Index 2018**).

In terms of renewable energies, the construction **Morocco's Noor Concentrated Solar Power (CSP)** Plant, the largest solar complex of its kind in the world is a stunning display of Morocco's renewable energy ambitions. Noor is the first CSP site in Morocco, and its 580-megawatt output is accelerating the country's bid for a 52% renewable energy mix by 2030. It is one of the largest infrastructure investments, not only in Morocco but also in Africa.

Morocco's direct investments in the continent increased sharply between 2003 and 2017 to a high of **\$3.7 billion** with the signature of **50 bilateral agreements** and a presence in **30 African countries**. The Kingdom has become the **second investor on the continent** behind South Africa in only few years. Banking remain the first area of investment, which, with the help of the reforms implemented in Morocco, made it possible to build a solid financial system. This financial system gave birth to competitive banking groups capable of establishing in Africa, followed by telecommunications sector, thanks to the reforms undertaken by Morocco in this sector since the 1990s. In 2019, King Mohamed VI designated a committee in order to come up with a new economic development model that shapes the specification of Morocco.

- **Social**

Over the past fifteen years, Morocco has made indisputable progress on the social side. The economic growth was translated into an increase in the country's total wealth and significant progress on the social level, with the eradication of extreme poverty and a sharp decrease in the poverty rate at the national threshold. It has also increased life expectancy and has provided better access to basic public services, including universal access to primary education. The country made a considerable development of basic infrastructure (water, electricity, transport).

In terms of individual freedoms, civil and political rights, revisions to the constitution in 1992 and 1996 began a process of democratization and modernization of public institutions through the creation of more representative institutions while recognizing new economic freedoms. In the wake of these constitutional changes and the impetus given to reforms by King Mohammed VI when he came to the throne in 1999, ambitious reforms and new laws were adopted to liberalize and strengthen public governance to guarantee an increasing number of fundamental human rights. The establishment of the **Equity and Reconciliation Commission** in 2004 enshrined transitional justice as a means of re-establishing the truth and repairing injustices committed in the past. Women's rights were substantially strengthened with the unanimously welcomed revision of the Family Code (**Moudawana**) in 2004. These developments are full of lessons but also of promise, given the institutional changes that have continued with the revision of the constitution in 2011.

Morocco has also set many development programs through national agencies that are operating in different regions of the country. These agencies are public institutions having financial autonomy, with the aim of economic and social development, and promotion of the region in which they are operating. On the other hand, one of the biggest challenges Morocco faces nowadays is to find a solution to the mismatch between the educational system and the training offered in order to meet the market requirements. The transition between school and the labor market is difficult in Morocco, which is leading to an increase in the unemployment rate every year. To overcome this challenge, the Presidency of the Moroccan government and the ministers are working with the Office for Vocational Training and Job Promotion (OFPPT) to develop new training programs that match the job market in Morocco.

- **Technological**

Concerning technology and innovation, Morocco is ranked 3<sup>rd</sup> in Africa and still has a lot of progress to make, which makes it a country with high potentials. Politicians have become aware of the importance of innovation and technology in the new geo-economic context, which sees the country increasingly confronted with the competition but also with new challenges and opportunities. Morocco, by participating in the installation of technological infrastructures in African countries and in the creation of research and innovation networks, would create spaces for collaboration and exchange of experiences with these countries and would also develop its technological leadership in the region, especially in the automotive industry after overtaking South Africa, in 2018, and became the leader in Africa in this industry.

Currently, the number of patents and the budget allocated to the Research and Development field could quantify technology and innovation. In Morocco, the private sector has a very small contribution to the budgets allocated to research; they are 70% public. In addition, the Kingdom invested 0.8% of its GDP in R&D in 2017. Which is better than the 0.34% in 2016, but it is still far from the average of 2.3% observed in OECD countries.

# Discussion

The Port of Gulfport in Mississippi can be one of the ports used for military exports to Morocco due to its designation as a strategic one in 2015. The Port of Gulfport is equipped with infrastructure to ensure exports under the best conditions and it is already operating in the foreign military exports with the export of **V-22 B Block C Osprey aircraft** helicopters to **Japan**, which allows us to say that the port has a reference in foreign military sales. The collaboration between the Port of Gulfport and Morocco will contribute to the continuity of the Moroccan military plan called “Regional Supremacy” made of several military acquisitions with a value of **\$3.8 billion**, which represents an opportunity for the Port of Gulfport.

Morocco has adopted a qualitative policy to keep its naval operational capacity intact. Even if it does not have tremendous financial capacities, its warships are the latest and the best maintained in the southern Mediterranean region and in West Africa. Morocco has also invested in facilities such as the **Port of Ksar Sghir**, which is the most recent one with an estimated cost of **\$140 million**. The Port of Ksar Sghir is considered as a great achievement for the Royal Navy called to defend Morocco, the southern flank of the Detroit, and the seafront of a significant part of northwest Africa.

The Port of Gulfport could contribute to this achievement by setting **visits** for the Moroccan authorities to Gulfport to show the support that the port can offer. The aim of these visits is to show the transfer of the knowledge, and the share of experience can be made through collaboration. The Port of Gulfport as a strategic port can assist in strengthening the management of Moroccan ports in exchange for developing the opportunity of U.S. defense exports through the Port of Gulfport.

Morocco, through the regional supremacy plan, seeks to develop its own manufacturing and maintenance capabilities for military equipment, which means that the kingdom will need to acquire more knowledge and experience to reach the level of expertise required in military industrialization. **The experience and the knowledge needed can be shared through a tripartite**

**collaboration between Morocco, the Port of Gulfport, and Mississippi Defense Initiative** through Mississippi manufactories in order to encourage Moroccan acquisition of foreign military sales from Mississippi region manufactories. This tripartite collaboration between Morocco, the Port of Gulfport, and the Mississippi defense can also ensure **training sessions to share the experience and the knowledge about the maintenance** concerning Moroccan military acquisitions. These training sessions can be ensured by the Mississippi defense with the collaboration of the Port of Gulfport to Moroccan military and engineers. Hence, new perspectives will be set to deepen relations between the kingdom of Morocco and the State of Mississippi, especially in the field of the defense industry.

The port of Gulfport with regard to the situation can consider other incentives such as:

- **Advantageous transport costs**
- **Short delivery times**

The 25 **M88A2** recovery vehicles, which Morocco will be importing, are manufactured by BAE Systems Division located in York, PA. The vehicles are upgraded at the Anniston Army Depot in Alabama. Most of Morocco land-based combat systems are exported from the **Port of Charleston**. This is an example of a defense export, which could be exported via the **Strategic Port of Gulfport** as well.

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