

How Is Turkish Military Technology Redrawing the Balance of Power in North Africa?



In the spring of 2020, the Libyan war took a different turn as the balance of power in the skies over the battlefield shifted. While the forces of retired General Khalifa Haftar continued their advance toward Tripoli, backed by broad regional and international support networks, Turkish drones began to appear over the front lines, targeting air defense systems, supply centers, and military movements with high precision.

Within a short period, the dynamics of the conflict shifted dramatically: the Government of National Accord regained the initiative, the attacking forces retreated eastward, and Libya became one of the clearest arenas revealing the impact of Turkish military technology in reshaping regional balances of power.

That moment carried implications that went beyond the Libyan war itself. It showed that military transformations in the twenty-first century are no longer tied solely to the size of conventional armies or possession of heavy arsenals, but are also increasingly linked to the ability to develop flexible, low-cost combat tools adaptable to modern warfare. In this context, Türkiye emerged as one of the regional powers most invested in domestic defense industries, benefiting from years of accumulated expertise and from a clear political desire to reduce

dependence on Western suppliers and expand its margin of strategic autonomy. This shift coincided with a highly turbulent phase in North Africa, the region at the crossroads of the Mediterranean, the African Sahel, and the Middle East, which over the past decade has become a theater of accelerating international and regional competition. France has sought to preserve its historic influence and old security networks, Russia has expanded through indirect military presence and private security companies, while the UAE has strengthened its political and military presence in several regional files, as China has continued building long-term economic influence through infrastructure, investments, and trade corridors.

Amid this entanglement, Türkiye found in military technology a tool that gives it greater capacity for political and security expansion without the need for large-scale deployment of conventional forces.

The Turkish experience derives its distinctiveness from the nature of the tools Ankara has developed in recent years. Turkish drones such as the “Bayraktar TB2,” “Akinci,” and “Anka” have offered a different model in the global arms market, with lower operating costs than Western systems, flexibility in use, rapid delivery, and the absence of the strict political restrictions that often accompany American or European arms deals.

These factors have made Turkish military technology attractive to a growing number of African states, especially those facing mounting security challenges and seeking effective ways to strengthen their defense capabilities at the lowest possible cost.

Within just a few years, Türkiye’s defense industries became one of Ankara’s most prominent foreign policy tools. According to official data issued by Türkiye’s Presidency of Defense Industries, defense and aerospace sector exports rose from around \$7.1 billion in 2024 to more than \$10 billion in 2025, driven by growing demand for drones, armored vehicles, and electronic warfare systems. Türkiye’s network of defense partnerships in Africa also expanded at a rapid pace, encompassing military training programs, security agreements, and transfers of technical expertise alongside direct arms deals.

This expansion was clearly reflected in North Africa, where Türkiye’s military presence has taken multiple forms that go beyond arms sales to building long-term security relationships. In Libya, Turkish technology played a direct role in changing the balance of war; in Tunisia, Morocco, Algeria, and Egypt, Turkish drones emerged in discussions related to military modernization and strengthening defense capabilities.

Turkish influence also expanded southward into the Sahel, amid growing African

interest in the Turkish defense industry model as a practical alternative to traditional Western and Russian systems.

This is where the importance of the question emerges: how is Turkish military technology redrawing the map of power in North Africa? And what makes Turkish drones and defense systems capable of evolving from mere military tools into instruments of political and strategic influence?

Morocco: From Importing to Building a Defense Industrial Base

Morocco represents one of the most prominent Maghreb cases illustrating the shift in its relationship with Turkish defense industries from simply acquiring weapons to attempting to build a long-term industrial partnership. Since Rabat received “Bayraktar TB2” drones in 2021, military cooperation between the two sides has gradually moved toward more complex levels, including projects related to maintenance, assembly, and the transfer of some technical expertise linked to unmanned systems.

And by 2024, signs began to grow regarding the possibility of establishing a local industrial infrastructure for drones inside Morocco, within the framework of a broader strategy adopted by Rabat to localize part of its defense industries and reduce full dependence on military imports.

In this context, reports emerged speaking of a project to establish a facility linked to drone production and maintenance near the city of Benslimane, alongside the registration of a local company called “Atlas Defense Industries” with Moroccan capital, aimed at working in the design of drone parts and the production of their components. The company’s name was later linked to cooperation projects with the Turkish company “Baykar,” which strengthened its presence in Morocco through industrial and commercial arrangements connected to the “Bayraktar TB2” and “Akinci” systems.

And the available information indicates in the Moroccan and international press that these projects could open the way to establishing the first production infrastructure linked to Turkish drones in North Africa, giving Morocco an advanced position within a regional market witnessing growing demand for this type of military technology.

This trend reflects a broader shift in Morocco’s industrial and military doctrine, as Rabat seeks to build a local defense sector capable of absorbing modern technology and developing technical expertise related to unmanned aircraft, reconnaissance systems, and smart munitions. This path also intersects with a broader Moroccan policy of attracting foreign defense investments, whether from Türkiye, the United States, or Israel, within a vision aimed at turning Morocco into an industrial and military platform that serves its domestic needs and gives it

greater room in African markets in the future.

At the regional level, this development is also tied to calculations of military balance within the Maghreb, particularly amid ongoing tensions between Morocco and Algeria. Rabat's possession of advanced Turkish systems, followed by a move to strengthen its capabilities with heavier and more advanced drones such as the "Akinci," gives the Moroccan armed forces broader capabilities in long-range reconnaissance, border surveillance, and precision strikes. It also adds a new dimension to the deterrence equation between the two countries, especially with the rapid transformation in the nature of modern warfare toward unmanned systems, electronic warfare, and networked capabilities.

Libya: The Most Sensitive Testing Ground

Libya is the clearest case for understanding how Turkish drones evolved from a tactical tool into an element capable of influencing military and political balances inside North Africa. Since the assault launched by the forces of retired General Khalifa Haftar on the capital, Tripoli, in 2019, Türkiye entered the conflict directly in support of the internationally recognized Government of National Accord, providing a broad package of military support that included "Bayraktar TB2" drones, air defense systems, military advisers, as well as capabilities related to electronic warfare and operational coordination.

In the battles around Tripoli, Turkish drones played a pivotal role in targeting supply lines, military positions, and air defense systems belonging to Haftar's forces, gradually helping to slow their advance and then push them to retreat from large areas in western Libya.

The Libyan experience gained added importance because of the indirect confrontation that emerged between Turkish technology and some of the Russian systems used on the battlefield, foremost among them the "Pantsir" systems for air defense. Turkish operations helped neutralize a number of these systems, weakening the defensive cover of the forces advancing toward Tripoli and redrawing the equation of air control in western Libya.

From that moment, Turkish drones began attracting growing attention within international military circles as a relatively low-cost model capable of achieving broad operational impact in asymmetric wars.

But the Libyan experience also revealed the limits of some light and medium tactical systems, especially in open and complex geographic environments. Challenges emerged related to operational range, dependence on communication systems, and the need for greater weapons payloads and broader reconnaissance capabilities. In light of these realities, Türkiye later moved to strengthen its unmanned aerial presence by introducing more

advanced platforms such as the “Akinci,” which has greater strike and reconnaissance capabilities and satellite communication capacities that allow operations to expand over longer distances.

Reports and circulated images in recent years have indicated the presence of this type of aircraft inside Misrata Air Base, reflecting the shift in Türkiye’s presence from tactical support to building a more advanced and sustainable unmanned air infrastructure inside Libya.

Over time, Türkiye’s role in Libya moved beyond the direct military framework to become an entry point for broader political and security influence. After the ceasefire agreement was signed, Ankara continued consolidating its presence through military and security cooperation agreements, and the Turkish parliament extended the mandate for Turkish forces in Libya until 2026, within what Ankara describes as support for stability and preserving the existing balance.

At the same time, Turkish relations began taking on a more pragmatic character toward various Libyan parties, including the eastern Libyan camp, amid growing recognition among local forces that Türkiye has become a player that is difficult to bypass in the Libyan equation.

Egypt: Defense Industries as a Bridge to Rebuilding Relations

The Egyptian-Turkish trajectory in recent years reveals a gradual shift in the place of defense industries within regional relations, as drones and military technology have begun to play a role that goes beyond traditional security calculations to become part of the process of rebuilding political trust between Ankara and Cairo. After long years of tension and sharp competition across multiple regional files, especially in Libya and the Eastern Mediterranean, the two countries entered, beginning in 2023, into a path of political and security rapprochement marked by growing pragmatism, which was later reflected in files of economic and military cooperation.

In this context, the drone file emerged as one of the clearest indicators of the ongoing shift in bilateral relations. Turkish Foreign Minister Hakan Fidan spoke in 2024 about Ankara’s readiness to provide Egypt with drone technology and other defense systems, coinciding with Turkish President Recep Tayyip Erdoğan’s visit to Cairo in February of that same year. These statements carried political messages that went beyond their technical dimension, reflecting the two sides’ readiness to move relations from a phase of de-escalation to one of building more stable shared interests.

This issue gains particular importance given Egypt’s geographic position and the complexity of its surrounding security environment. Egypt faces overlapping

challenges stretching from its western border with Libya to the Red Sea, Sudan, and the Gaza Strip arenas that require advanced capabilities in surveillance, reconnaissance, border management, and precision operations. In this context, Turkish drones appear to be a practical option offering a combination of lower operating costs, technical flexibility, and the possibility of expanding use in border security, reconnaissance, and surveillance.

But the most important development in this trajectory appeared when discussion moved from merely purchasing ready-made systems to the possibilities of industrial cooperation and technology transfer. In August 2025, Egyptian and Turkish media reports spoke of the signing of an agreement between the Arab Organization for Industrialization and the Turkish company Havelsan to produce “TurgA” vertical takeoff and landing drones inside Egypt through the Kader Factory for Advanced Industries.

The agreement included provisions related to the transfer of technical expertise and local manufacturing, allowing it to meet the needs of the Egyptian market and potentially open the way to other African markets in the future.

This trend reflects an important change in Egypt’s approach to armament and defense technology. Cairo, which for decades relied on traditional suppliers such as the United States, France, and Russia, is increasingly seeking to diversify its sources of military technology and expand its local manufacturing base, amid growing awareness of the importance of possessing production capabilities linked to unmanned systems and modern digital technologies.

Cooperation with Türkiye also offers an opportunity to benefit from industrial expertise that has developed rapidly over the past decade, especially in the fields of drones, command-and-control systems, and electronic warfare.

For its part, Ankara views this cooperation as more than just a defense deal or a limited industrial partnership. The entry of Turkish military industries into the Egyptian market gives Türkiye a presence inside one of the region’s largest and most influential military institutions, while also opening the door to broader partnerships in Africa, the Red Sea, and the Eastern Mediterranean.

From this angle, military technology appears to be a tool helping Ankara consolidate political rapprochement with Cairo through long-term interests that are difficult to separate from the strategic calculations of both sides.

These shifts also reflect a broader trend in the nature of regional relations in the Middle East and North Africa, where defense industries have become part of the tools of diplomacy and alliance-building, rather than merely a technical file separate from politics. Turkish drones, once used in arenas that saw sharp competition between Ankara and Cairo, have gradually turned into a possible

area of cooperation between the two countries, revealing the scale of change taking place in the priorities of regional powers amid the region's accelerating security and economic transformations.

Algeria: Maghreb Balances and the Limits of Defense Openness to Türkiye

Algeria occupies an extremely sensitive position in Turkish defense calculations related to North Africa and the Mediterranean. The country, which possesses the second-largest army on the African continent, and manages vast borders stretching across highly unstable spaces in the Sahel and Libya, represents a partner that cannot be ignored by any power seeking to build a long-term security and military presence in the region. From this perspective, the relationship between Algeria and Turkish defense industries appears to be part of broader transformations in the Maghreb's strategic environment, where border security considerations, regional competition, and the changing nature of modern military technology intersect.

Over past decades, Algeria built its defense doctrine on a broad armament base that relied primarily on Russian systems, whether in the air force, air defenses, or land and naval forces. This approach provided the Algerian army with considerable deterrent capabilities and cemented Algeria's image as one of Africa's heaviest military powers. But the international shifts accompanying the Russia-Ukraine war, and the sanctions and pressures that followed on supply chains, maintenance, and modernization, pushed the Algerian military establishment to think more seriously about diversifying its sources of defense technology and widening the range of options available to it.

In this context, Türkiye began to appear as a defense partner with characteristics different from traditional suppliers. Ankara combines NATO membership with the ability to maintain a wide margin of independence in its regional policies, while its rising defense industries now provide systems that have proven their operational presence in arenas close to Algeria's security environment, especially with regard to drones, reconnaissance systems, and electronic warfare.

This issue gains added importance for Algeria given the nature of the challenges it faces on its southern and eastern borders, where threats linked to armed groups, smuggling networks, irregular migration, and recurring security collapses in the Sahel and Libya overlap.

In this context, drones appear to be a tool of growing strategic value for Algeria. A country with one of the largest geographic areas in Africa needs surveillance means capable of covering vast desert regions at lower operating costs than conventional aviation, while providing a continuous capacity for monitoring and

rapid response. Unmanned systems also give the armed forces greater capabilities in gathering intelligence, tracking cross-border movements, and carrying out precise operations in rugged and complex environments without exposing human crews to the same risks associated with conventional operations.

But the internal security dimension is not the only factor explaining Algeria's growing interest in drone technology. Regional competition with Morocco is also one of the elements shaping Algeria's defense calculations. In this context, reports emerged saying that Algeria had acquired Turkish "Aksungur" drones, becoming the first foreign customer for this type of UAV. Although Moscow and Beijing still retain the largest share of Algeria's arms market, alongside European suppliers such as Italy and Germany, Algeria's limited opening to Turkish defense industries reflects a trend toward diversifying partners and testing new technological alternatives in specific fields, especially those related to aerial surveillance and unmanned aircraft.

At the same time, Algeria has maintained a degree of caution in managing this file, aware of the sensitivity of military balances in the Maghreb. Algerian authorities understand that any major shift in the region's armament structure could directly affect equations of regional deterrence. Therefore, in parallel, they have continued strengthening defense cooperation with Russia and China, including the acquisition of Chinese drones, air defense systems, and advanced missiles, within a policy based on distributing sources of power and avoiding dependence on a single partner.

For Türkiye, meanwhile, Algeria represents more than just a promising defense market. It is a geopolitical gateway to North Africa and the Sahel, a country with influential presence in energy, migration, and regional security files, and building a stable defense partnership with it gives Ankara a more balanced position within the Maghreb and Mediterranean space. From this angle, the defense relationship between the two countries appears to be part of a broader Turkish effort to entrench a long-term presence in Africa through military technology and security partnerships, not only through trade exchange or traditional diplomatic relations.

Tunisia: Expanding Security Capabilities Through Defense Partnership With Türkiye

The Tunisian experience reflects a different aspect of Türkiye's defense presence in North Africa, one based more heavily on supporting security capabilities, border monitoring, and strengthening the state's ability to confront irregular threats. Since the signing of the military cooperation agreement between Tunisia and Türkiye in 2017, defense relations between the two countries have gradually

expanded to include training, equipment, and the transfer of technical expertise, as Tunisia seeks to modernize some of its military and security capabilities amid a turbulent regional environment.

This path received an important boost when Tunisia moved to acquire Turkish military equipment, including armored vehicles resistant to mines, such as the “Kirpi” and “Vuran,” which were specifically designed to operate in rugged environments and confront threats linked to explosive devices and unconventional attacks. This step came amid growing Tunisian interest in developing the capabilities of its ground forces, especially with continuing security challenges on the western and southern borders and rising concerns related to smuggling networks and cross-border armed groups.

But the most notable shift in defense cooperation between the two sides came with the entry of drones into the bilateral military relationship. According to reports and research studies, Tunisia moved in 2021 to acquire three “Anka-S” drones, along with ground control stations and extensive training programs that included dozens of Tunisian pilots and technicians. The deal was estimated at around \$80 million, financed with support from Turkish institutions linked to exports, in a step reflecting Ankara’s desire to expand its presence in Tunisia’s defense market through deals combining financing, training, and the transfer of operational expertise.

This deal carries implications that go beyond the direct military dimension, as it reveals a Tunisian trend toward building a more independent operational capability in the field of unmanned aircraft, especially in surveillance, reconnaissance, and border management. Drones provide Tunisian forces with the ability to monitor movements in desert and mountainous areas for long periods, at lower operating costs than conventional aviation, giving security and military agencies more effective tools to monitor the borders with Libya and Algeria and track smuggling networks and armed groups active in some border areas.

The introduction of the Anka-S systems was also linked to Tunisia’s plan to strengthen aerial surveillance in sensitive areas, especially around Mount Chaambi and the western regions that have witnessed activity by armed groups linked to extremist organizations in recent years. In this context, drones provide important capabilities in gathering intelligence, tracking movements, and supporting ground operations in environments that are difficult to control through conventional means alone.

Although the process of delivering and operating the aircraft experienced some delays related to technical and political procedures, Tunisia gradually began

bringing these systems into service during 2022 and 2023, becoming one of the Maghreb states with actual operational capabilities in the field of medium-altitude, long-endurance Turkish drones.

Tunisia appears keen to benefit from this cooperation without entering into sharp regional alignments, as it seeks to diversify its military partnerships and maintain balanced relations with various international powers. But the introduction of Turkish technology into Tunisia's security system also reflects the broader transformation underway in the region, where unmanned systems have become an essential part of border security strategies and the management of transnational threats, in a regional environment where low-cost, highly flexible military technology is becoming increasingly important.

Future Prospects and Shifts in the Balance of Power

The transformations witnessed in North Africa in recent years indicate that military technology has become one of the most important elements in reshaping regional influence, and that drones in particular have turned into a tool capable of affecting political and military balances in ways that exceed their immediate technical size. In this context, Türkiye appears set to deepen its defense presence in Africa and the Mediterranean in the coming years, benefiting from the momentum its military industries have achieved in multiple arenas and from growing demand for low-cost, highly effective unmanned systems.

Estimates related to Türkiye's defense industries expect continued expansion in the production of more advanced generations of drones during the period from 2026 to 2028—platforms that give the forces using them greater capabilities in range, payload, reconnaissance, and long-range strike. At the same time, Türkiye has also begun developing unmanned naval systems, including drone vessels and autonomous submarines, opening the door to a broader shift in the nature of military competition in the Mediterranean and along African coasts, especially for states with growing maritime interests in energy, ports, and trade routes.

This means North Africa may enter a more complex phase of technological arms racing in the coming years, where competition will not be limited to possessing drones alone, but will extend to smart naval systems, electronic warfare, command-and-control platforms, and the ability to manage battle digitally. In this context, the region's states appear headed toward continuing a policy of diversifying suppliers and avoiding dependence on a single military partner, giving them broader room for maneuver but also creating growing challenges linked to the multiplicity of systems and the difficulty of integrating them technically within a single military structure, in addition to rising costs of maintenance, training, and operational compatibility.

Moroccan-Algerian competition remains one of the most prominent factors shaping the future of Maghreb balances. Drones have become an increasingly important part of the deterrence equation between the two countries, especially as Rabat moves to develop partnerships linked to local production, assembly, and maintenance, while Algeria seeks to expand its defense options through cooperation with Türkiye, China, and Russia at the same time. This competition is likely to continue in the coming years, pushing both countries to strengthen their capabilities in unmanned systems and adding a new technological dimension to the traditional struggle over influence and regional balance.

As for Libya, it is likely to remain the most sensitive arena for testing competition among international and regional powers inside North Africa. Turkish technology has entrenched its presence in western Libya, while other powers continue supporting different parties through Chinese and Russian systems and multiple arms sources. In the absence of a comprehensive political settlement, drones and heavy weapons will remain a core part of the equation of influence inside the country, making Libya's future stability closely tied to the ability of local and international actors to reach arrangements regulating the use of these systems and limiting their transformation into tools for perpetuating division.

Egyptian-Turkish relations also merit close monitoring in the coming phase, given the implications they carry beyond bilateral cooperation. If Cairo succeeds in developing joint drone manufacturing projects and expanding them toward producing more advanced platforms, Egypt could become an influential industrial and military actor within the African market, potentially creating a model that combines cooperation and competition with Türkiye at the same time. Ankara seeks to expand its defense exports and industrial influence, while Cairo is trying to build a local production base that reduces its dependence on traditional suppliers and gives it greater ability to move within Africa and the Middle East.

In Tunisia, the future of military cooperation with Türkiye will remain closely tied to political stability and the economic ability to finance new deals and expand military modernization programs. The financial challenges facing the Tunisian state may limit its ability to continue defense spending at a high pace, despite the ongoing need to develop surveillance, reconnaissance, and border security systems in light of the complex security environment surrounding it.

From Weapons to Influence

North Africa's experience reveals that Turkish military technology has turned into a geopolitical tool helping Ankara rebuild its regional presence through security partnerships, technical cooperation, and the transfer of expertise. The field successes achieved by Turkish drones in Libya and other arenas gave Turkish

defense industries broad operational credibility and pushed a growing number of states to view them as a practical means of strengthening military capabilities at lower cost and with greater flexibility than traditional alternatives.

This success has reshaped patterns of military procurement in North Africa, as the region's states have gradually begun moving away from the model of complete dependence on a single supplier and toward building more diversified relationships with multiple powers. In this sense, Türkiye has helped break part of the traditional monopoly exercised by major powers over the regional arms market by offering a model based on combining technology, training, financing, and knowledge transfer.

But this shift also carries complex implications for the region's stability. The rapid spread of unmanned systems increases the likelihood of arms races, lowers the cost of using military force, and creates an environment more prone to rapid escalation in border crises or internal conflicts. The absence of clear legal and regulatory frameworks governing the use of this technology also raises concerns related to civilian casualties, the transfer of some systems or their components to non-state actors, and the erosion of traditional restraints associated with the use of force.

Accordingly, North Africa's future will not be determined only by possession of the most advanced military technology, but also by the ability of the region's states to build security and legal arrangements that reduce the risks of instability and prevent technological competition from becoming a permanent source of disorder. Drones and unmanned aircraft have redrawn an important part of the map of power in the region, but the way these transformations are managed in the coming years will determine whether the region is heading toward a more stable balance, or toward a new phase of open competition and protracted conflict.