

# Germany Defence and Security Report Q2 2014

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## Abstracts

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BMI's Germany Defence & Security Report for Q214 examines the country's defence posture, defence procurement initiatives and its defence spending. Chiefly, the report examines the sometimes painful transition of Germany's armed forces from their Cold War-era role of defending the country against Soviet and Warsaw Pact aggression into a force capable of meeting the security challenges of the 21st century. BMI expects Germany to spend US\$47.3bn on defence in 2014, a reduction from the US\$47.6bn spent in 2013. We expect the country to spend on average US\$47.9bn annually on defence between 2015 and 2018. Germany is one of several NATO countries that routinely spends below NATO's non-binding requirement of its members to spend a minimum of 2% of GDP on defence. Between 2014 and 2018, we expect defence spending to account for an average of 1.3% of GDP.

Germany maintains a defence trade balance in its favour. The country exports significantly more materiel than it imports, which is not wholly surprising as the country is one of the largest exporters of materiel, with its defence equipment held in high regard by customers around the world. We calculate that Germany's defence trade balance will, on average, be US\$249.7mn in Germany's favour annually between 2015 and 2018.

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