

Malaysia Defence and Security Report Q1 2011

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Date: January 2011

Pages: 96

Price: US\$ 1,295.00 (Single User License)

ID: MB4E10BB7F7EN

Abstracts

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The ruling Barisan Nasional (BN) coalition is likely to remain in power after the next general elections, which is due in 2013, although it could be called as early as 2011. Prime Minister Najib Razak, who also leads the United Malays National Organisation (UMNO, the leading partner in BN) has implemented a number of official initiatives since assuming the top post – namely the Economic Transformation Programme (ETP) and 1Malaysia – with the aim of helping to improve Malaysia's economy and mend ties between the country's various ethnic groups, respectively. While we doubt the efficacy of these policies, we believe Najib's efforts will have a morale-boosting effect on the electorate, at least in the short term.

Piracy in South East Asia is still a major security issue, especially in the Malacca Strait. and waters around Indonesia, near Malaysia. The Strait is one of the world's main maritime 'chokepoints.' There had been fears that terrorists could block the channel. However, in 2009 there were only seven attacks for the whole year.

On July 20, defence minister Zahid Hamidi announced that Malaysia will use more offsets and financial packages, such as investment, for new defence equipment procurement. This will apply to Malaysia's new five-year plan for defence purchasing, which begins in January 2011. Further, the government is to establish the region's first extensive defence and security technology park in Sungkai, Perak. The park will contain resources for manufacturing, support industries, and research & development. Construction begins in October.

The Malaysian Armed Forces is planning spend MYR2.2bn on three multi-role support ships (MRSS) to provide faster humanitarian aid and disaster relief. Five shipbuilders from several European and Asian countries will build one of the three MRSSs. The

other two will be constructed locally. The MRSS, containing a helicopter pad, will supply food, medicines, clothing and other utilities to disaster zones.

Malaysia's Q310 real GDP growth came in at a 5.3% year-on-year (y-o-y), decelerating from the 8.9% figure registered in Q210. In particular, the domestic economy – led by private consumption and investment growth – performed especially well. This helped compensate for the external sector's drag on overall expansion due to relative growth outperformance in imports versus exports, as well as lower government consumption. We expect the positive growth momentum to persist well into Q410 and enable the country to register full-year expansion of 6.4%. Going forward, we believe the pace of economic growth will moderate significantly in 2011 and 2012. Indeed, we expect the external sector to be adversely affected by a region-wide economic slump, dragged down by a slowdown in Chinese growth.

Therefore, we forecast 2011 real GDP growth to come in at a still-respectable 4.0%, before accelerating slightly to 4.3% in 2012 in line with a regional economic recovery.

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