

# Malaysia Defence and Security Report Q4 2014

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## Abstracts

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**BMI View:** As Malaysia enters a new financial year, we expect to see an upward trend in military and defence procurement. 2014 saw very little activity in the defence sector as the government reviewed its defence procurement strategy. The release of a new five year development plan and a review of Malaysia's defence offsetting programme could yield changes for the indigenous defence sector in 2015. However, we forecast a marginal rise in defence spending, which remains a low priority for the government which is trying to address a budget deficit. Meanwhile, Malaysia enjoys peace and stability with regards to internal and external security threats. Key concerns include continued incursions by Filipino groups and rising piracy in regional waters.

We expect defence spending to remain a low priority under the 2015 budget, which will focus on economic growth, improving the fiscal position, and raising living standards. BMI forecasts a small increase in defence spending through 2015, rising in line with national GDP growth. This will leave the budget allocation to the defence sector unchanged as a percentage of GDP, dropping marginally from 1.5% in 2014 to 1.4% in 2015.

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