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West Germany: Domestic and International Economic Issues

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West Germany: Domestic and International Economic Issues

*Central Intelligence Agency
Directorate of Intelligence*

July 1977

Key Judgments

The West German economic recovery has softened in recent months. Real GNP growth this year will likely be closer to 4 percent than to the 4.5-percent CIA forecast in March. In any event, the government's goal of 5-percent real growth, reaffirmed at the London Summit, almost certainly will not be achieved. Although controversy over the government's energy program is delaying investment decisions, the primary culprit is a slowdown in export growth.

So far the government has taken no policy initiatives that would appreciably improve this year's outlook, even though Bonn recognizes that its growth target and unemployment goals are not likely to be met. Both fiscal and monetary authorities remain convinced that large-scale economic stimulation would add to inflation without having much effect on unemployment, which they believe results mainly from structural weaknesses in the economy. Bonn stresses that half of the unemployed are youths under 20 years of age, physically handicapped, or women seeking part-time jobs.

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Because of the virtual certainty that Germany will fail to achieve its 1977 economic growth target, Schmidt probably anticipates pressure from Washington for greater economic stimulation during his July visit to the United States. He will also expect to discuss Germany's nuclear export policy, US-German arms trade and coproduction issues, and court-imposed US trade restrictions, and he will want to exchange views on the ongoing North-South dialogue.

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Despite his promise to place a moratorium on German exports of some sensitive nuclear technologies, the Chancellor refuses to commit himself in the area of uranium enrichment. As to bilateral arms trade, German unhappiness with the US Army's pursuit of an all-US XM-1 tank in preference to Germany's Leopard II is a factor behind Bonn's hesitation to approve AWACS for NATO use.

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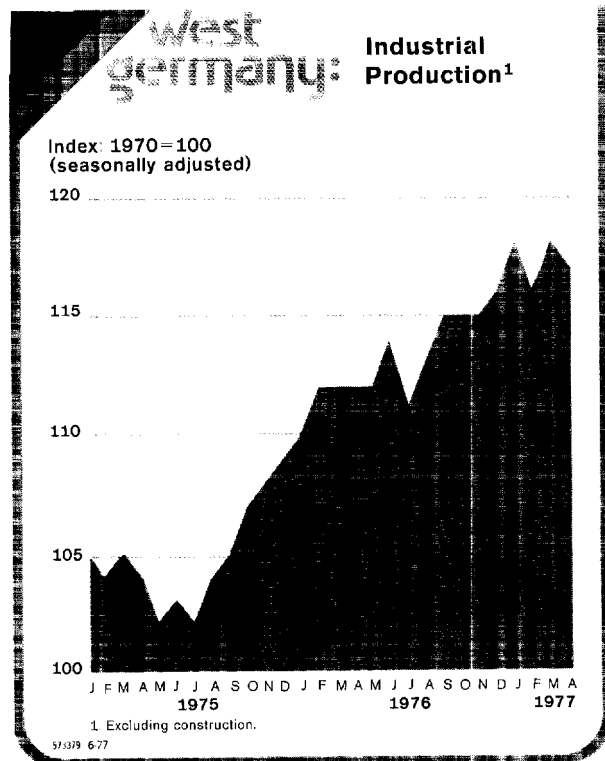
West Germany: Domestic and International Economic Issues

Recovery Losing Momentum

The pace of German economic recovery has already slowed two percentage points since fourth quarter 1976, to an annual rate of 4 percent in the first quarter. This rate now seems more likely than the 4.5 percent CIA forecast in March* to persist for the rest of 1977. Bonn recently lowered its growth projection from 5 percent to 4.5 percent, and the principal German economic research institutes retreated from their earlier joint forecast of 5.5 percent, with three of them now expecting 4.5-percent growth and the other two only 3.5 percent. The Organization for Economic Cooperation and Development (OECD), on the other hand, upped its forecast from 3.5 percent to 4 percent (see Appendix I). Industrial expansion in particular has slowed, with output rising at an annual rate of only 5.3 percent in January-April as compared to the previous four-month period. New industrial orders point to continued moderate growth, though these data must be used with caution because of recent revisions in the data base and method of collation. The total volume of new orders for the first four months of 1977 is a little above that of the same period in 1976 (see figure 1).

Exports in particular have not performed as well as anticipated by CIA and by German

*The CIA forecast is based on a combination of analytical judgments and the results obtained from an 84-equation econometric model of the German economy. For the primary assumptions underlying the forecast, see Appendix II. A description of the model is available from [redacted] on IDS code 143, extension 5911.



forecasting groups earlier this year (see table 1). A slowdown in the growth of sales to France, Italy, Eastern Europe, and the Middle East has more than offset accelerated shipments to the smaller European countries and to Japan. Export volume in the first quarter was only 7 percent higher than a year earlier. As important, the volume of new foreign orders for the first four months of 1977 increased less than half as much as in the same period 1976. The preva-

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Table 1
West Germany: CIA Forecast of Key 1977 Economic Indicators

	March	June
<i>Percent change from the year 1976, real terms</i>		
GNP	4.5	4-4.5
Private consumption	4.5	4.5
Public consumption	2.5	3.0
Gross fixed investment	5.5	5.0
Exports	8.5	7.5
Imports	9.5	8.5
GNP deflator	4.0	4.0
<i>Persons</i>		
Average unemployment	950,000	980,000

lence of anti-inflationary policies in the West European countries and hard-currency shortages in the Eastern ones suggest that a slower export pace will persist. Hence, *CIA's forecast now assumes 7.5 percent export growth, down one percentage point from its March forecast.*

Real private consumption continued to rise in first quarter 1977 after a strong performance in late 1976 and *is still expected to show a 4.5-percent increase for the year as a whole.* This year's improved growth rate will stem from bigger gains in real wages and a 10-percent hike in pension payments in July. Concern over job security, however, should prevent a boom in consumer spending. For example, consumers spent only 14 percent of the \$5.5 billion in government subsidized contractual savings that were unfrozen at the beginning of 1977; most of the funds were reinvested in savings accounts. A similar disposition of funds is likely when \$5.1 billion is unfrozen in July.

Total federal and state expenditures are budgeted to rise faster than last year, reflecting in part the first installment of the government's infrastructure program. However, because increases in tax revenues—assessed on last year's healthy level of economic activity—are expected to outpace the rise in expenditures, the federal deficit should shrink by a fifth. The public sector deficit (excluding social insurance and government enterprise deficits) could drop from \$20 billion to \$14 billion.

Gross fixed investment should also do relatively well this year, rising at close to last year's

5-percent rate. Uncertainties about the government's energy program are causing some businessmen to delay investment decisions. Nevertheless, the climate for investment has been improved by higher profits and better credit conditions highlighted by a reduction in new public sector borrowing and lower interest rates. New domestic orders for investment goods are above year-earlier levels. Manufacturing capacity utilization, 83 percent in April, has risen nearly 7 percentage points since recovery began. Though the level will vary considerably from industry to industry, overall utilization may remain below the 1973 level this year. Meanwhile, an appreciating Deutschemark and rising unit labor costs continue to exert pressure for investment in labor-saving equipment—a rising share of total fixed investment since 1970 (see table 2).

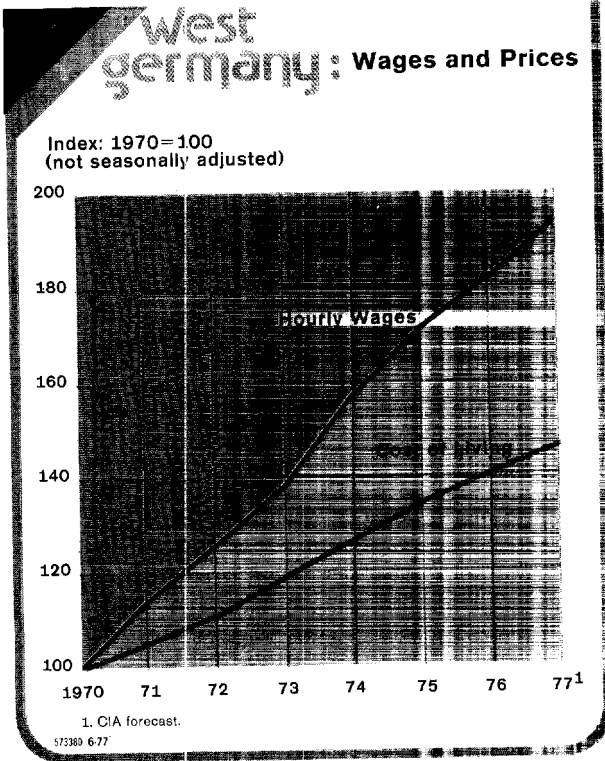
The rate of inflation this year should remain around 4 percent or perhaps slightly lower—less than half the expected average for OECD countries. Consumer price increases accelerated somewhat earlier in the year, largely because of selected excise tax increases. Since then they have again slowed. Industrial producer prices thus far this year rose at a seasonally adjusted annual rate of less than 1 percent. This rate will quicken as this year's higher wage settlements impact on production costs. Nevertheless, the gradual pace of economic expansion and competition from imported goods probably will force producers to absorb at least some of the cost increases in their profit margins (figure 2).

With some deterioration in the terms of trade and slower export growth, Germany's current account and overall payments surpluses will decline, especially in Deutschemark terms (see table 3). The Deutschemark's rapid appreciation against the dollar since mid-1976, however, will

Table 2
West Germany: Distribution of Fixed Investment

	1970	1971	1972	1973	1974	1975	Percent 1976
Capacity expansion	57	50	40	41	35	25	15
Replacement	11	15	19	19	21	25	30
Rationalization	32	35	41	40	44	50	55

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offset much of this decline in dollar terms. The current account surplus should be around \$2.5 billion, down from \$3 billion last year. The overall payments balance should shrink even more. The eightyfold improvement in the long-term capital account that occurred in 1976 is unlikely to be repeated this year. Foreign purchases of German fixed-interest securities are running far behind last year's pace because

Table 3
West Germany: Balance of Payments¹

	Billion US \$	
	1976	CIA Forecast 1977
Current account balance	3.0	2.5
Balance on goods and services	10.0	10.1
Unilateral transfers	-7.0	-7.6
Long-term capital (net)	-0.1	NA
Short-term capital (net)	0.4	NA
Errors and omissions ²	-2.9	NA
Net change in reserves	0.4	NA

¹ Data converted at US \$1 = DM 2.518 for 1976, US \$1 = DM 2.36 for 1977

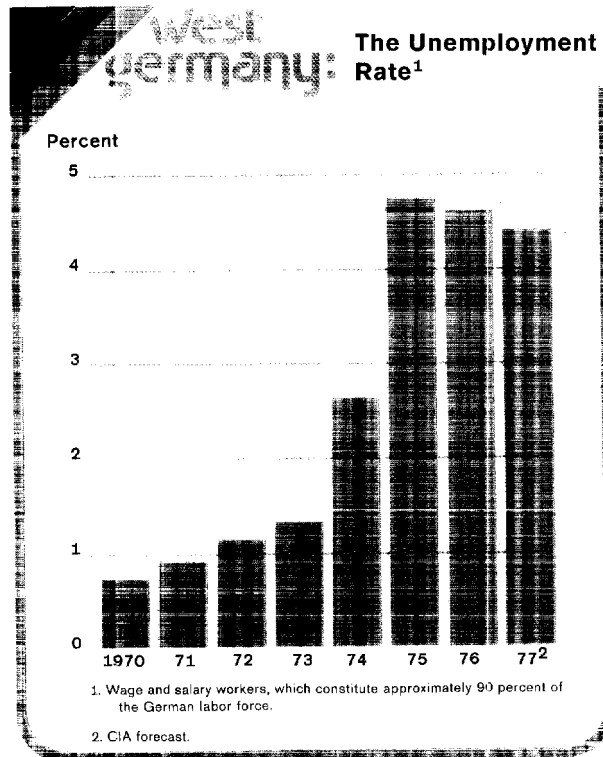
² Including losses due to the DM appreciation.

of lower interest rates and expectations of slower Deutschemark appreciation. If exchange markets remain relatively calm, the balance of short-term capital flows will continue to be below last year's level.

Unemployment—the Major Preoccupation of Policymakers

Persistent near-record unemployment remains the most worrisome problem on the German politico-economic scene. Two years into the current cyclical upswing, unemployment (seasonally adjusted) remains above 1 million, down less than 200,000 from its recession peak. Joblessness has actually increased in the past two months (seasonally adjusted) and now stands at 4.5 percent of wage and salary earners. For 1977 as a whole, unemployment seems more likely to average 980,000 than the 850,000 set as a goal (see figure 3).

Even if legally possible, the involuntary repatriation of the more than 1.9 million



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foreign workers remaining in Germany—about 9 percent of total wage and salary earners—would not solve the unemployment problem. More than half a million foreign workers already have left since 1973, and the remainder is protected by treaty commitments (for EC nationals) or by contractual agreements. Most of them perform the more routine or menial jobs that Germans have come to consider beneath their dignity. With unemployment benefits relatively high, the prejudice against accepting “Gastarbeiter” jobs has not significantly changed.

The intractability of the unemployment results in part from the increasing share of problem groups among job seekers and from structural changes in industry.

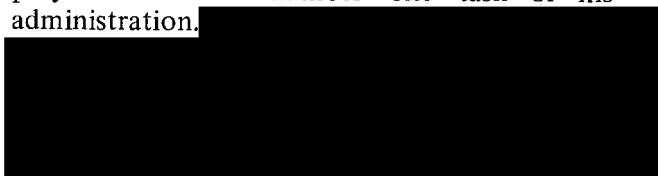
- According to a special survey of Federal Labor Office in September 1976, approximately half of the unemployed are *young people under 20 years of age* (and therefore without completed vocational or professional training); *workers with some physical handicap* (whose employment is viewed as less cost-effective); and *women looking for part-time work* (potentially posing scheduling problems for employers).
- A sizable group of the unemployed over 20 years of age has few vocational skills. Wages for unskilled labor rose disproportionately fast in the early 1970s, inducing many workers to leave school and low-paying apprenticeship training. Now these people have become victims of automation or other labor cost-cutting measures.
- The stagnation or decline in employment in such important industrial branches as machine building, autos, iron and steel, and some sectors of electrical and electronic equipment manufacture, have aggravated the occupational and, to some extent, the geographical mismatch between labor skills offered and those demanded. These factors explain in part the sharp difference between the 5.7-percent and the 5.1-percent unemployment rates in Lower Saxony and Rhineland-Westphalia on the one hand and the

2.9-percent rate in Baden-Wuerttemberg on the other.

Thus far the persistence of massive unemployment has generated more political heat than social unrest. The latter is probably explained by the fact that for most of the people affected unemployment is a temporary phenomenon. Two-fifths of the jobless have been out of work less than three months, and two-thirds draw unemployment compensation that approximately equals their previous net pay. Hard-core unemployment—that is, joblessness for one year or more—affects less than 200,000 people.

Nevertheless, there is growing impatience with the slow pace of improvement, especially among union leaders and the more doctrinaire left-wing politicians. Concern is increasing that the current cyclical upswing will peak before unemployment has come down much. This concern is heightened by the realization that the labor force will grow more rapidly in the next few years because of the baby boom in the early 1960s. At the same time, fewer jobs are being created since rising cost are encouraging firms to adopt more labor saving devices.

Schmidt clearly is on the spot. In his May Day speech to the Trade Union Federation, the Chancellor singled out the reduction of unemployment as the number one task of his administration.



Reluctance to Take Expansionary Action



Schmidt thus far has refused to take major reflationary measures. Strongly backed by his more conservative Free Democratic partners and by the Bundesbank, the Chancellor continues to believe that such measures would generate more inflation than employment. He remains convinced that the most effective way to reduce the large struc-

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tural component of unemployment is through specifically tailored manpower programs.

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- To improve the business climate and hence stimulate investment needed to provide jobs, Bonn adopted a medium-term investment program. Some \$5 billion to \$6 billion in federal and state funds will be used to improve the country's infrastructure over the next few years; \$1.5 billion in orders are to be let this year.
- To help the ailing construction industry, Bonn recently extended through 1978 construction subsidies scheduled to expire this year. Bonn also plans to provide an additional \$625 million to subsidize the construction of an additional 30,000 dwellings this year.
- To reduce unemployment directly, Bonn recently announced a manpower program that provides \$250 million to place hard-to-employ persons such as older white collar workers and to create 20,000 new part-time jobs in hospitals and nursing homes. The program also creates an additional 1,600 jobs for employment counsellors to improve the labor referral services, continues subsidies aimed at relocating workers, and tightens eligibility requirements for unemployment compensation.
- A compromise package yet to be approved by the Bundesrat would reduce business taxes and increase child-support payments next year in exchange for a 1-percent rise in the value added tax. Though not originally intended, the package, as likely to be approved, will probably have a mildly stimulatory effect.

While the government's manpower program seems likely to be the most effective measure taken to date in reducing unemployment, the infrastructure plan will add some jobs by 1978

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as well. It will impact directly on the labor-intensive construction sector where unemployment is particularly high. The wisdom of extending housing construction subsidies, however, is questionable. The housing market already is glutted with some 200,000 vacant housing units. None of these measures will add significantly to this year's growth, but they should help keep next year's economic activity close to this 1977 level.

Schmidt's Approach to Washington Talks

In view of Bonn's downward revisions in its own growth forecast, Schmidt probably anticipates pressure for additional economic stimulation from Washington during his July visit to the United States.



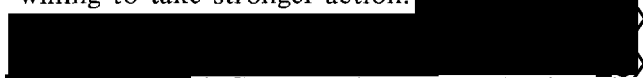
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Increased Economic Stimulation

Schmidt is fully aware of the continuing US interest in rapid German economic expansion as a means of helping countries with balance-of-payments deficits. Unlike two months ago at the London Summit, he will not be able to state confidently that Germany will meet its 5-percent economic growth target. Even official German government forecasts now envisage only 4.5-percent growth under current economic policies.

Although the Chancellor probably remains dubious about the long-run economic usefulness of ad hoc stimulatory measures, he may be willing to take stronger action.



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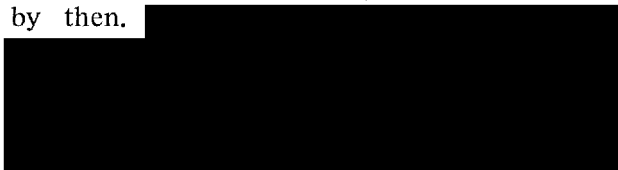
Inflation is being contained, and government finances are in substantially better shape than expected. According to some press speculation, the Chancellor intends to submit a

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new government investment program next fall if unemployment has not improved dramatically by then.



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Nuclear Policies

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In a recent joint press conference with French President Giscard, Schmidt brought German nuclear export policy somewhat more in line with US views. He stated that "for the time being" Germany will not authorize new export licenses for nuclear reprocessing facilities or technology. At the same time, however, he reiterated Bonn's plan to honor its commitment to deliver a reprocessing plant to Brazil. The Chancellor issued no parallel moratorium on exports of enrichment technology, reportedly because "other nations" have not made such a commitment.

Bonn is prepared to abide by all international agreements covering the sale of nuclear equipment and technology. At the same time, it seeks assurance that natural or enriched uranium exporting countries not exploit their supplier position to enforce additional restrictions on Germany's nuclear industry.

Bonn's rejection of any restrictions on exports of nuclear reactors stems from the belief that "it is in the interest of the nation's economy to remain internationally competitive in this important sector of highly sophisticated technology." This belief also explains the recent allocation of two-thirds of the \$2.7 billion energy research and development budget over the next four years to nuclear research, particularly in rapid breeder reactors.

Nuclear exports have assumed increased importance now that Germany's domestic nuclear program is enmeshed in controversy. The main point of contention is Bonn's desire to increase nuclear power generating capacity from the current 6,500 MW to 30,000 MW by the second half of the 1980s.

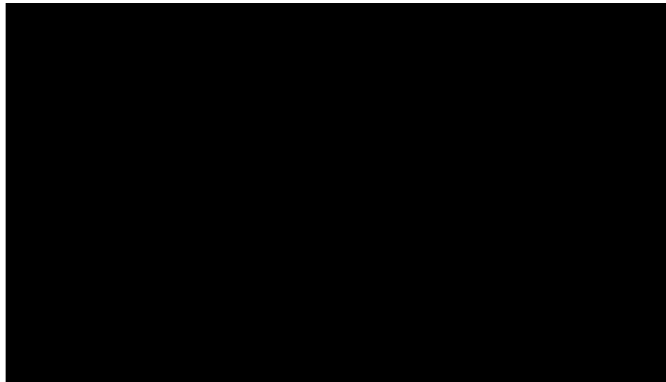


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*Arms Trade and Coproduction:
A Two-Way Street*

The gross imbalance in US-German bilateral arms trade in favor of the United States has long concerned Bonn. This sore point in US-German relations has recently become more acute as unemployment has mounted. Some officials believe that increasing the weapons share of exports from 1 percent to 3 to 5 percent could double the 200,000 jobs currently in industries handling defense contracts. The relatively high inflation rates prevailing in the 1970s have, moreover, increased Bonn's desire to reduce the unit costs of defense production through expanded sales abroad.* Finally, Germany's increased assertiveness with respect to US-German arms trade and coproduction reflects an increased awareness of the substantial German military and economic role within NATO.

The US Army's preference for an all-US XM-1 tanks over the German Leopard II has given rise to some disillusionment in Germany regarding US resolve to pursue the two-way street. Defense Minister Leber himself has characterized US behavior in the competitive tank trials late last year as "oriental," and some German press commentators have even charged that the tests were rigged. Perhaps more importantly, Bonn believes that foreign sales prospects for the Leopard II have been damaged by

*Germany pursues the most restrictive arms export policies of any major arms producer. Any change in these policies would meet with strong public opposition. Recently, however, German labor and industry, as well as countries having arms coproduction agreements with Germany have pressured Bonn to expand weapons exports.

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US publicity of the competition. An abrupt, in the German view, change in US Coast Guard requirements for a maritime patrol aircraft—effectively excluding the German contender, the VFW-Fokker 614—has further ruffled German feathers.

Dissatisfaction with the outcome of the tank trials has added to Bonn's reluctance to buy the Boeing E3A AWACS developed by the United States to fulfill NATO requirements for an airborne early warning aircraft. [REDACTED]

[REDACTED] German officials have conveyed the impression of a linkage between the US Army's choice of the XM-1 and German hesitation in participating in AWACS. There is considerable evidence, though, that Bonn is reluctant to buy the system at this time due to genuine skepticism as to its military merit, doubts regarding overall system costs (particularly the German share), and an unwillingness on the part of the German armed services to fund it at the cost of longstanding priority weapons acquisition programs.

Given these considerations, [REDACTED] Bonn could continue to hold back from the AWACS system in the absence of a substantial US gesture with respect to cooperative arms production.

North-South Dialogue

From the start, Germany has opposed major concessions to LDCs; it believes such concessions would violate free market principles and further strain public sector finances. Bonn is unhappy with the outcome of the recent Paris round of North-South talks, convinced that the industrial countries gave far more than they received. As one German commentator put it "the LDCs were on the whole successful but act disappointed; the industrial countries had no success but pretend that they did." The government is particularly concerned over the industrial countries' failure to press harder for the export earnings stabilization (STABEX) scheme favored by Germany. Having only reluctantly endorsed a common fund for stabilizing raw material prices, Bonn will try to minimize the

fund's operations and finances when negotiations resume later this year.

The heavy potential costs resulting from the common fund worry the Germans as much as the budgetary impact of LDC demands for generalized debt relief. Bonn feels common funding would lead to higher prices and surplus production of many raw materials, while debt relief would absolve the LDCs from fiscal and monetary discipline.

Bonn also deplores the industrial countries' failure to gain reciprocal concessions with respect to energy consultation, assurance of raw material supply, and guarantees for direct investments. Progress on these issues will be necessary if the government is to be able to sell parliament the idea of upping German aid expenditures from 0.3 percent to 0.7 percent of GNP. The OPEC and Soviet Bloc countries would also have to increase their aid effort.

Trade Policy

Bonn strongly supported the London Summit pledge that countries would refrain from import restrictions as a means of improving their external positions. In view of the slower than expected rise in exports so far this year, the Germans are increasingly concerned over what they consider to be a rising wave of protectionism in the United States. They appreciate that the US administration has sought to blunt this wave but are primarily concerned about a recent US court decision calling for countervailing duties on imports benefiting from value-added tax relief. The value-added tax is a standard feature of German—and EC—tax systems, which provide for rebate of value-added taxes paid on goods exported. Thus, all German (and EC) exports to the United States would become subject to countervailing duties if the US court decision is upheld. Under General Agreement on Tariffs and Trade (GATT) regulations, value-added tax rebates on exports are not considered an export subsidy. Bonn will follow the US court action with great interest and undoubtedly would protest adverse rulings, calling for GATT review, and implicitly at least, threaten countermeasures.

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Appendix I

Comparative Forecasts

Forecasts of West Germany's 1977 real GNP growth show an unusual amount of variation. The five German economic institutes* split into two groups in April, when their latest semi-annual joint forecast was due. Three institutes agreed on a 4.5-percent real growth projection, while the other two said growth would be only 3.5 percent. Even this dichotomy represented some convergence from positions held at the start of work on a joint forecast. Nevertheless, all the institutes except DIW already had retreated from the previous joint forecast of 5.5 percent, which only Essen originally had said was too high. In May, the West German government lowered its official forecast from 5.0 percent to 4.5 percent. As for outside observers, Chase Econometrics reiterated its 4.6-percent projection in March, and the OECD recently raised its sights half a point to 4 percent.

The forecasts (see Table 4) differ most concerning business investment, reflecting widely varying judgments on both fixed investment and stockbuilding. Most forecasters expect exports to pick up later this year and to determine the course of the recovery in 1978.

*These institutes include the German Institute for Economic Research (DIW), Berlin; the IFO Institute for Economic Research, Munich; the Rhineland-Westphalia Economic Research Institute, Essen; the Institute for World Economics, Kiel; and the Institute for Economic Research (HWWA), Hamburg.

Table 4
West Germany: Real GNP Growth, 1977

	Percent
Latest Forecasts	
German government	4.5
Chase econometrics	4.6
DIW, Hamburg, and Kiel consensus	4.5
OECD	4.0
IFO, Essen consensus	3.5

General variances in the projections result largely from differences in orientation and methodology. IFO—one of the two pessimistic institutes—relies heavily on surveys on business expectations; Essen—the other pessimist—consistently reflects viewpoints of the business community. DIW—the last institute to abandon the 5.5-percent forecast—employs primarily econometric analysis, while government forecasts may reflect a politically motivated upward bias. The OECD, which uses a judgmental approach, apparently raised its forecast from the low end of the range when it proved to be inconsistent with first-quarter data.

Some variation in the forecast may result from different interpretations of recent government statistical revisions. Changes in the series for new orders, industrial production, and the national income accounts have confronted analysts with troublesome problems of data comparability.

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Appendix II

Assumptions Underlying CIA Forecast

The primary assumption underlying current CIA projections of German GNP growth in 1977 at 4 to 4.5 percent is a 7.5-percent increase in export volume in 1977. This is slightly higher than Bonn's revised projection. The money supply—central bank money stock plus free liquid reserves—is assumed to expand about 6 percent on average during 1977. This produces a 9-percent growth in the central bank money stock, compared with the 8-percent goal announced by the Bundesbank in December.

Other major assumptions remain essentially unchanged since our March forecast. We assume an 8-percent rise in nominal government consumption and a 10-percent increase in nominal government investment that includes \$1.5 bil-

Table 5
Basic Assumptions
Percent 1977 Growth Rate

	March	June
Export volume	8.5	7.5
Nominal government spending:		
consumption	8.3	8.3
investment	6.4	10.2
Hourly wage rate (average for entire economy)	7.0	7.0
Money supply	7.8	6.0

lion of the supplementary public investment program. Other than the increase in specific excise taxes at the first of this year, no major changes in tax rates during 1977 are assumed. We also assume a 7-percent gain in negotiated wage rates (see table 5).

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24	West Germany: Domestic and	57
53	International Economic	80

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