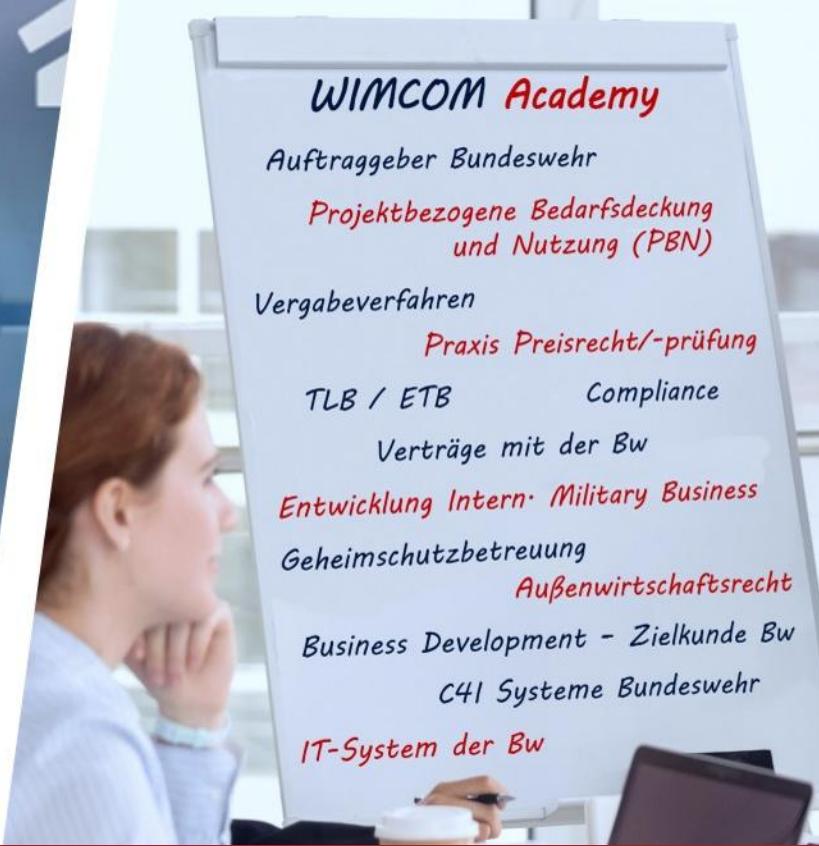


B2M



Military Business in Germany: From Automotive to Defence

Heinrich Niermann

November 26, 2025, AHK Slowenien





AGENDA

1

Introduction

2

About WIMCOM GmbH – *The military business company*

3

Military business (B2M)

4

Risks & rewards

Heinrich Niermann - CV



HEINRICH NIERMANN

Born June 06, 1958
in Bad Iburg, Lower Saxony
Married,
Father of 3 children
Hobbies: Hunting, Sports



1991 – 2000: Procurement-Manager SKF GmbH, Schweinfurt
2000-2006: Proc.-Director Daimler Trucks Kassel
2006 – 2008: Proc.-Director DaimlerChrysler, Seoul
2008-2010: Proc.-Director Daimler Trucks, Stuttgart
2010-2018: Proc.-Director FotonDaimler Aut., Beijing



CAREER:

1977 – 1989: Officer in the Bundeswehr (Leopard 2)
1982 /1991: Degrees M.A. & M.B.A., Bundeswehr University Hamburg / University of Houston/Texas



2019 – now: Senior Advisor WIMCOM GmbH, Höhr-Grenzhausen, Germany





AGENDA

1

Introduction

2

About WIMCOM GmbH – *The military business company*

3

Military business (B2M)

4

Risks & rewards

WIMCOM – The military business company

Facts & figures



FOUNDED

2014



EMPLOYEES

~ 30



STRUCTURE

INDEPENDENT



PROJECTS

> 400



INCREASE IN CUSTOMER'S SALES

4 Bn. €



3 BUSINESS UNITS

**CONSULTING
ACADEMY
TRAINING**



COMPLIANCE

CONFIDENTIAL



NETWORK

**NATIONAL /
INTERNATIONAL**



WIMCOM – The military business company

Business units



Consulting of companies in business
with the Bundeswehr /
NATO / EU



Focus:
Increase in revenue



Teaching of
contextual and
background knowledge



Focus:
Knowledge transfer



Dealing with civil servants/soldiers in
The Bundeswehr,
establishing/maintaining the network,
development B2M, etc.



Focus:
Personality development



AGENDA

1

Introduction

2

About WIMCOM GmbH – *The military business company*

3

Military business (B2M)

4

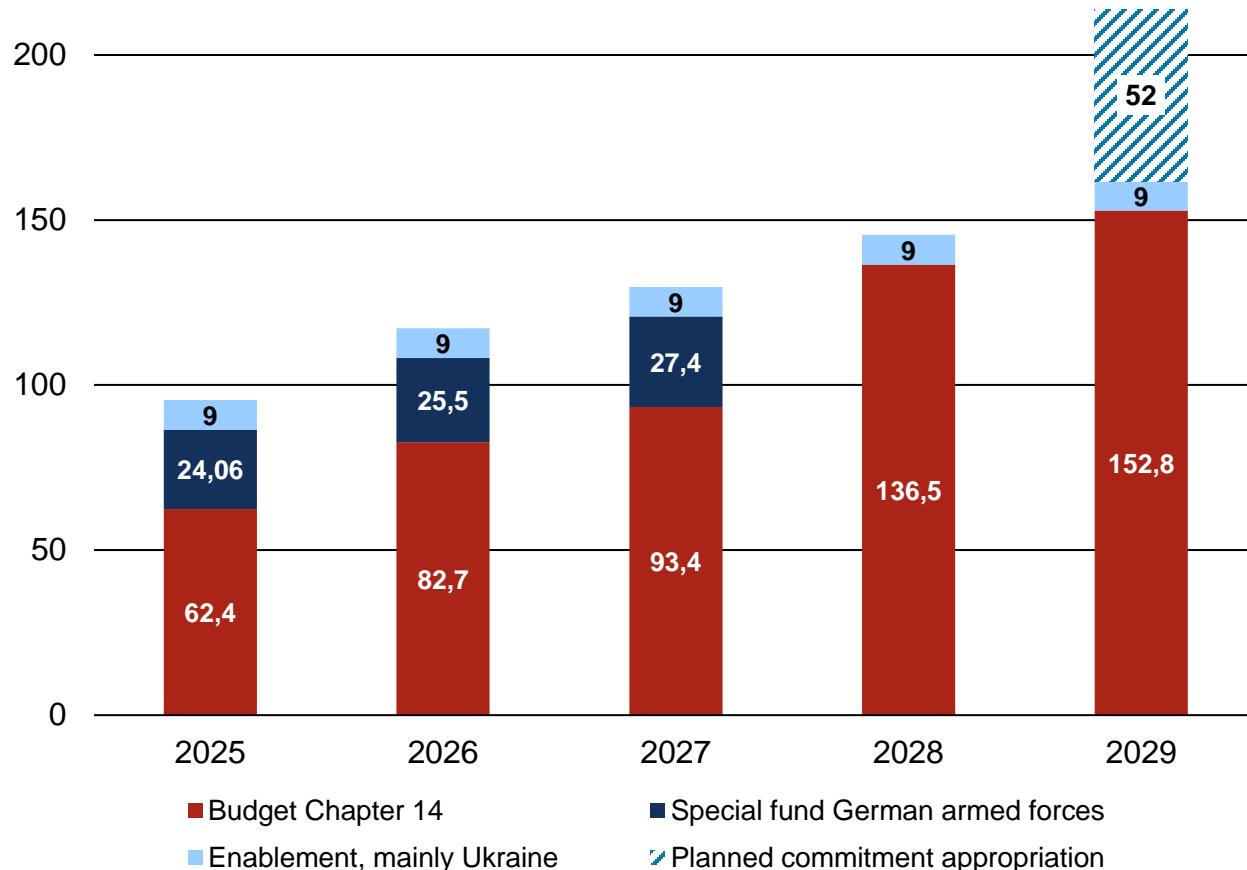
Risks & rewards

Industry potential in the military business

... is directly linked to defence spending



Defence Spending (in € bn)



Defence spending by the member states is to increase to **3.5 % of GDP** – this includes, for example, armaments as well as salaries

In addition, **1.5 % is scheduled for Defence- and security-related areas** such as infrastructure, industry, and resilience – i.e., the protection of critical infrastructure, cyberspace, or the expansion of roads and bridges usable for military purposes

These targets are to be achieved **by 2035**; Germany contributes 10% of the overall NATO-capabilities

Defence technology industry in Germany

Who is it?



An overview...

Bundeswehr



Public contracting authority

System integrator (OEM)



© WIMCOM

Industry

Supplier

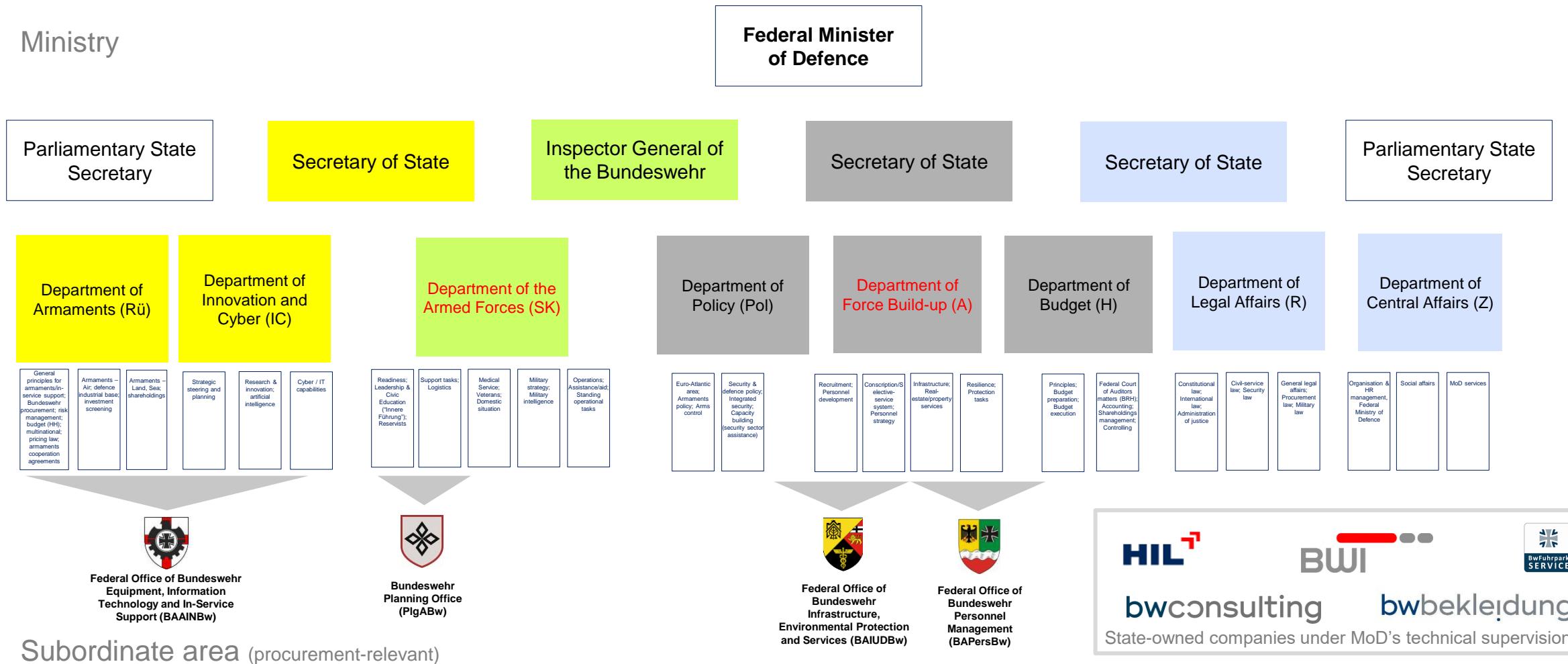


Procurement Organization

Roles within the organization



Ministry



Industry potential in the military business

... the two largest procurement agencies of the Bundeswehr



BAAINBw (Koblenz) Federal Office of Bundeswehr Equipment, Information Technology and In-Service Support



- Equipment and materiel for the armed forces
- Services (e.g., transport contracts)
- Complex services (e.g., maintenance of vehicles)

www.baainbw.de/en

BAIUDBw (Bonn) Federal Office of Bundeswehr Infrastructure, Environmental Protection and Services



- Construction projects in Germany and abroad
- Compliance with environmental and occupational safety regulations
- General service tasks

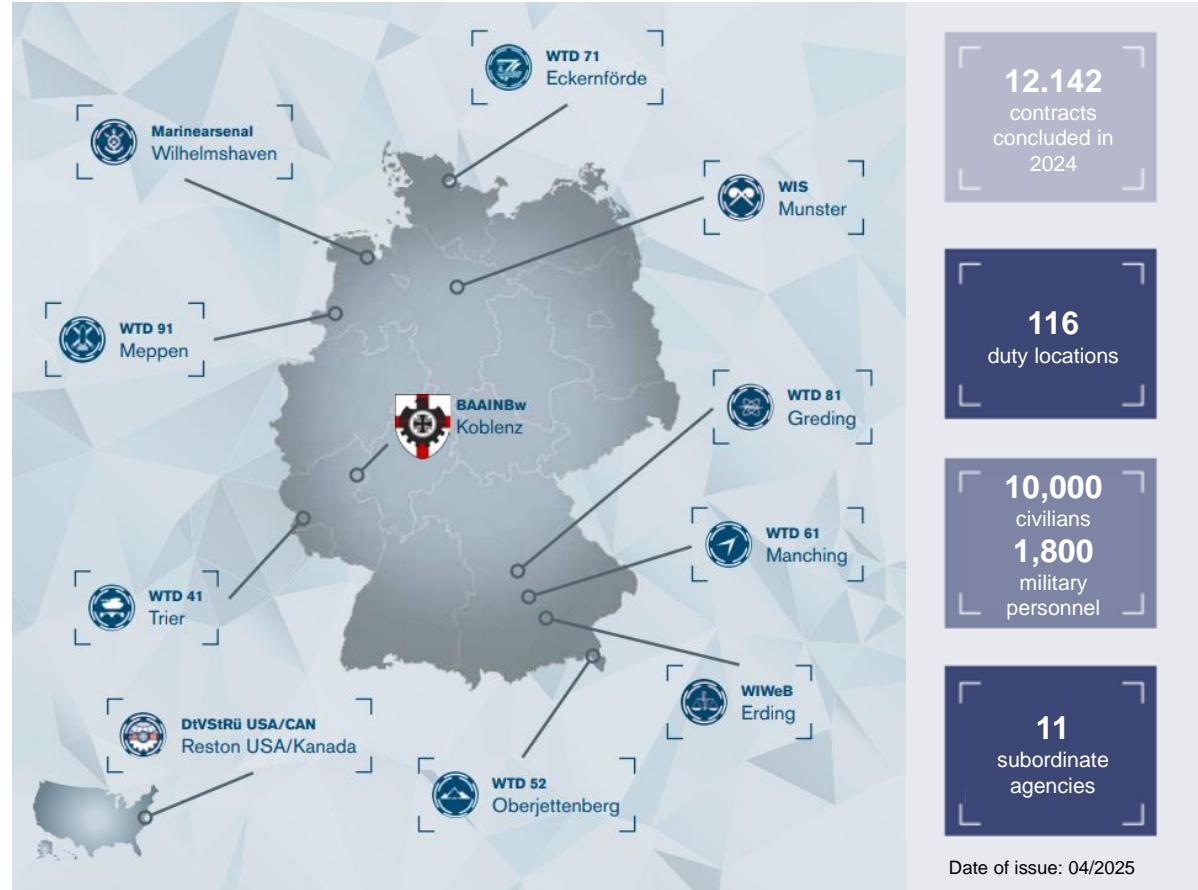
www.iud.bundeswehr.de/en

Industry potential in the military business

BAAINBw: Federal Office of Bundeswehr Equipment, Information Technology and In-Service Support



- Tasks within the scope of the **equipment and in-service support process**, in particular project management, procurement/contracting, and in-service management
- **Centralized procurement of products and services**, including the strategic management of Bundeswehr purchasing
- **Research and technology (R&T) tasks**, participation in international R&T cooperation, and technical evaluation of foreign Defence materiel
- **Preservation and restoration of the operational readiness** of Defence materiel and IT throughout the entire life cycle, up to disposal



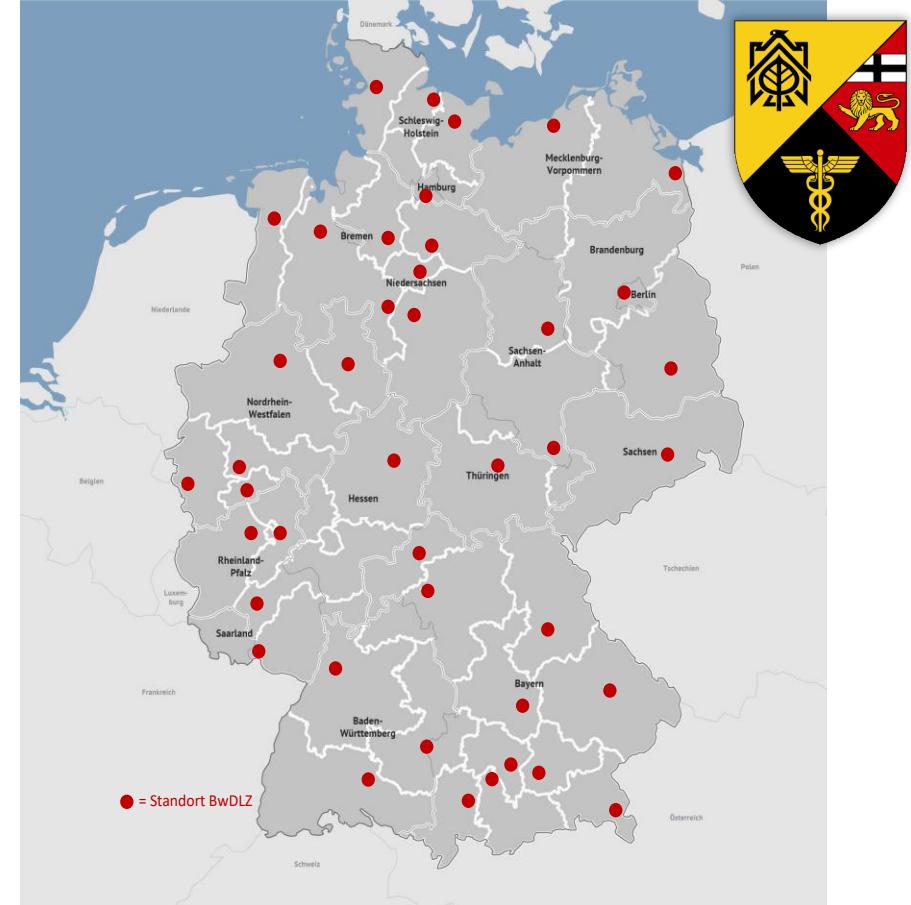
Industry potential in the military business

BAIUDBw: Federal Office of Bundeswehr Infrastructure, Environmental Protection and Services



Example: Facility management of the Bw Service Centers

- 1,500 properties, 260,000 hectares of land, over 33,000 buildings
- Facility Management is the largest business area of the Bw Service Centers (area roughly equivalent to the Saarland)
- **Services:** technical and infrastructural building and property management, supply and waste disposal
- **Tasks:** waste management, heating plants, maintenance of outdoor facilities, electrical systems, procurement of materials, and repairs



Industry potential in the military business

In-house companies of the Bundeswehr as contracting authorities



Procurement portfolio

- Land vehicles
- Maintenance / repair
- Spare parts
- IT services
- Consulting

Procurement portfolio

- IT-equipment
- Project services
- Management & support services
- Software licenses

Procurement portfolio

- Semi-militarized vehicles
- Maintenance
- Legal consulting
- Fleet management

Procurement portfolio

- Combat clothing
- Uniforms
- Sportswear
- Consulting

Certification requirements

What prerequisites must be met?



Certifications as a supplier

- The basis of **quality management** for contracts with the Bundeswehr are NATO's quality-assurance requirements, the **Allied Quality Assurance Publications (AQAP)**
- **AQAP 2110** incorporates the requirements of **ISO 9001**, which are supplemented by **NATO-specific provisions**
- Prime contractors (**OEMs**) may require proof of a **sustainability concept** as part of supplier accreditation
- Especially in the **Business-to-Military (B2M)** context, particular attention must be paid to **IT security**



Certification requirements

What prerequisites must be met?



Standards and regulations

- **STANAG 4370** – Environmental Testing (NATO Standardization Agreement)
- **AECTP** (Allied Environmental Conditions and Test Publications; part of STANAG 4370)
- **MIL-STD** (e.g., MIL-STD-461 – Electromagnetic Compatibility / EMC)
- **DEF-STD** (UK Defence Standards)
- **ITOP** (International Test Operations Procedures)
- **VG** standards (German defence equipment standards – focus e.g. EMC)
- **LZB** – List of approved components
- **WL** – Material performance/data sheets
- **TL** – Technical delivery conditions/specifications
- **REACH / RoHS**

DEFENSE STANDARDS

Defense standards regulate the development and procurement of defense materiel in all cases where civilian standards cannot be applied. Here you will find applicable German military standards and material specification sheets.

[Home](#) > Organization > Equipment, Information Technology and In-Service Support > Contract Award > Standards

www.bundeswehr.de/en/organization/equipment/contract-award/standards

Bundeswehr Procurement 2025/26

Major expenditures for military projects decided



Procurement planning for the German Armed Forces until the end of 2026

The German Armed Forces want to conclude development and procurement contracts for 153 major projects by December 2026, each of which must be submitted to the German Bundestag's Budget Committee for approval with a budget of €25 million.

The detailed list contains 153 projects that are to be submitted to the German Bundestag's budget committee for approval as €25 million proposals between September 10, 2025, and December 9, 2026. The projects are listed with the submission dates for the various levels, the categorization, the budget item, and the financial requirements.

In total, the list shows planned expenditures of almost €83 billion. This will result in some long-term contracts being concluded. The vast majority of the funds will not be disbursed until after 2026.



Sub-unit force / organizational area	Project sums (billion €)	Share (percent %)
Army	20,2	24
Air force	15,5	19
Navy	36,3	44
CIR	3,2	4
Support area	6,6	8
Not allocated	1,3	2
Total	83,1	

Bundeswehr Procurement Acceleration Act (BwBBG I&II)

Law to accelerate procurement measures for the Bundeswehr



Part I

Special Fund & Procurement Acceleration (2022)

€100 billion special fund established through amendment of the Basic Law, dedicated to armaments and digitalization

Temporary simplifications in procurement and review procedures to enable faster acquisition of materiel

Parliamentary oversight remains in place; major contracts over €25mn remain subject to budgetary approval

Part II

Law on Accelerated Planning & Procurement (2025/2026)

New law (BwPBBG) adopted in July 2025, planned to take effect in early 2026

Since 1 August 2025, higher value thresholds for procurements apply immediately to facilitate acquisitions

Permanent extension to planning, procurement & innovation partnerships, with EU exemptions



First the crisis solution with the €100 billion special fund, now the structural reform: procurement is becoming faster, simpler, and more transparent. BwBBG II transforms the one-off measures into a permanent system to strengthen operational readiness

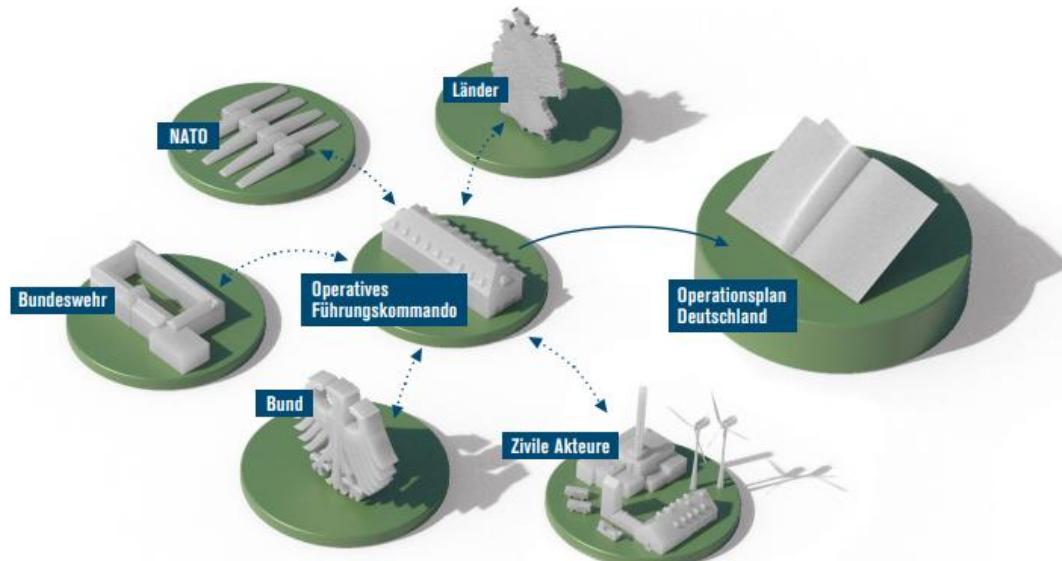
OPLAN DEU bundles military tasks in Germany

Focuses on infrastructure and related services



What is the OPLAN DEU?

A classified operations plan, updated regularly by the **Joint Operations Command**. It combines the **military elements of national and alliance defence** with civilian support services into an operational plan—action only upon political decision and within the constitutional framework



Germany as a hub: Germany serves as a logistical hub, enabling the transit of allied forces and providing pre-planned routes, transshipment points and protective measures



Protecting critical infrastructure & supply chains: Securing transport routes, energy, logistics and networks in cooperation with police, authorities and operators to maintain functionality



Homeland security & territorial defence: The Bundeswehr builds homeland security forces, integrates reservists, and assumes protection and defence tasks within Germany



Command & coordination in Germany: The Joint Operations Command leads the OPLAN, coordinates military measures domestically, and links civilian with military structures



Whole-of-government framework (civil + military): The OPLAN is part of comprehensive defence, involving the federal government, Länder, municipalities, business and the population, putting national and alliance defence (LV/BV) at the centre



AGENDA

1

Introduction

2

About WIMCOM GmbH – *The military business company*

3

Military business (B2M)

4

Risks & rewards

Opportunities & risks

Doing business with public contracting authorities – what does it mean?



On the one hand, doing business with public contracting authorities is attractive, as they are regarded as long-standing partners with high payment reliability. On the other hand, especially newcomers must deal with a very complex procurement organization.

- **Prerequisite:** Understanding the highly formal, procurement-law-driven actions of public contracting authorities
- **Complex distribution** of roles and responsibilities at the ministerial level and within the so-called “subordinate agencies”
- **Fundamental separation** of “demand consolidators” (procurement authorities), “demand definers” (planning office), and “users” (the troops)



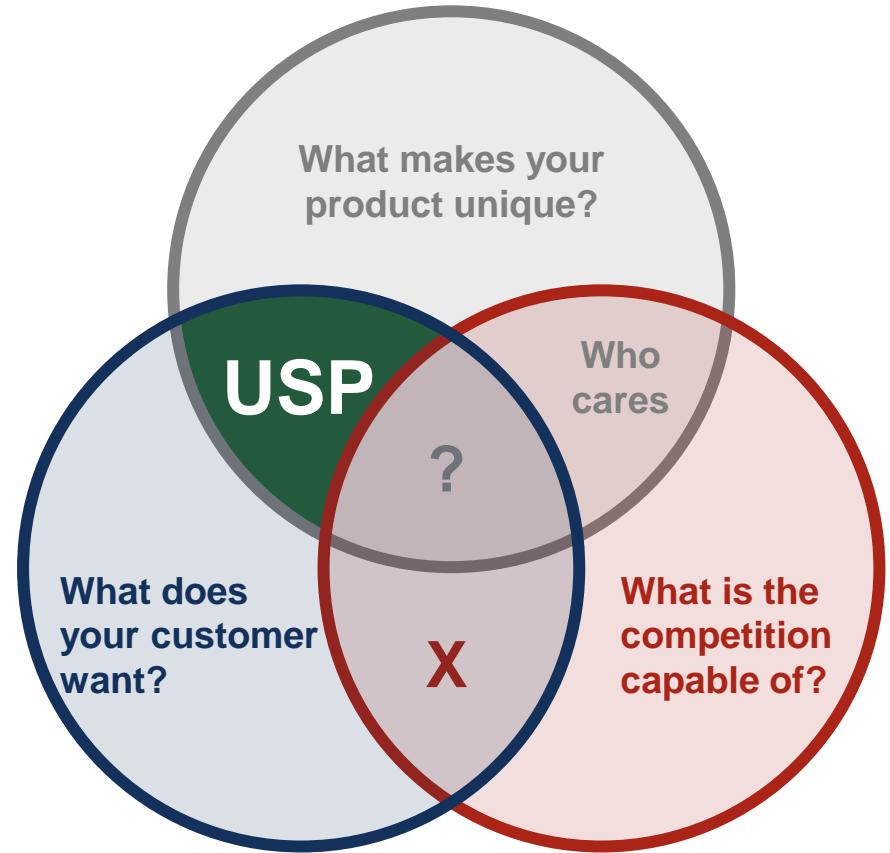
Opportunities & risks

Which prerequisites must be met?



Requirements for contractors

- Detailed **knowledge of the Bundeswehr demands**
- Familiarity with complex **procurement platforms, tendering procedures, and bid submission** within public procurement processes, as well as supplier platforms of OEMs
- Ability to **position own products & services within military-used assemblies**, subsystems, or complete systems
- Offering **products & services that provide a unique selling proposition (USP)** for the armed forces' requirements
- Understanding that engagement in the “military market” can only be successful on a **strategic (long-term) basis**



Opportunities & risks

Opportunities from rapidly increasing Defence expenditures



Increase in orders

Particularly in demand: electronics, sensors, drones, communication; spare parts and maintenance systems; software, cyber Defence, AI applications



Increased involvement in major programs

SMEs can generally participate as subcontractors in large-scale projects (e.g., F-35, Eurofighter, MGCS, FCAS)



Innovation and technology transfer

More funding enables **R&D investments**. SMEs can tap into **new niches**, e.g., autonomous technologies, sustainability, digitalization



Internationalization

Growing **Defence expenditures abroad** also create export opportunities, particularly through bilateral cooperation or NATO projects

Opportunities & risks

Risks from rapidly increasing Defence expenditures



Dependence on politics and Budgets

The industry remains heavily dependent on political decisions. A change in direction (e.g., after a change of government) could devalue investments



Capacity shortages

Rapidly rising demand meets limited production and personnel resources, which may lead to supply problems and operational stress



Procurement procedures with increasing volumes

Complex public tenders make access more difficult for smaller companies. Many procedures are hardly manageable for SMEs



Financing needs and upfront services

High upfront performance is often required before payments made – a risk for smaller firms without strong capital reserves



Market concentration on system integrators

Risk that mainly large Defence companies benefit from new funds, while SMEs are marginalized

SME Feasibility Study – Security of Supply

German Defence: from overview to market entry for foreign SMEs



► De-risk entry by mapping how Germany buys Defence equipment, where demand is covered by funding, and how a foreign supplier can qualify, partner and win



Methods

- Desk research: policies, budgets, tender, etc.
- Expert interviews: OEMs, Tier-1/2, agencies
- Validation: 2 workshops (mid-point + final)

Deliverables

- Market & procurement map
- Funding compendium
- Demand gap deck & matrix
- Tech/R&D slate
- Barrier playbook
- Labor brief

Decisions at a glance

- Go/No-Go by segment
- Top opportunities
- First customers/partners
- Risk & compliance checklist



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