

Outlook MMXXIII

Andi Widjajanto

January 20, 2023



Geopolitical Landscape



United States Threats

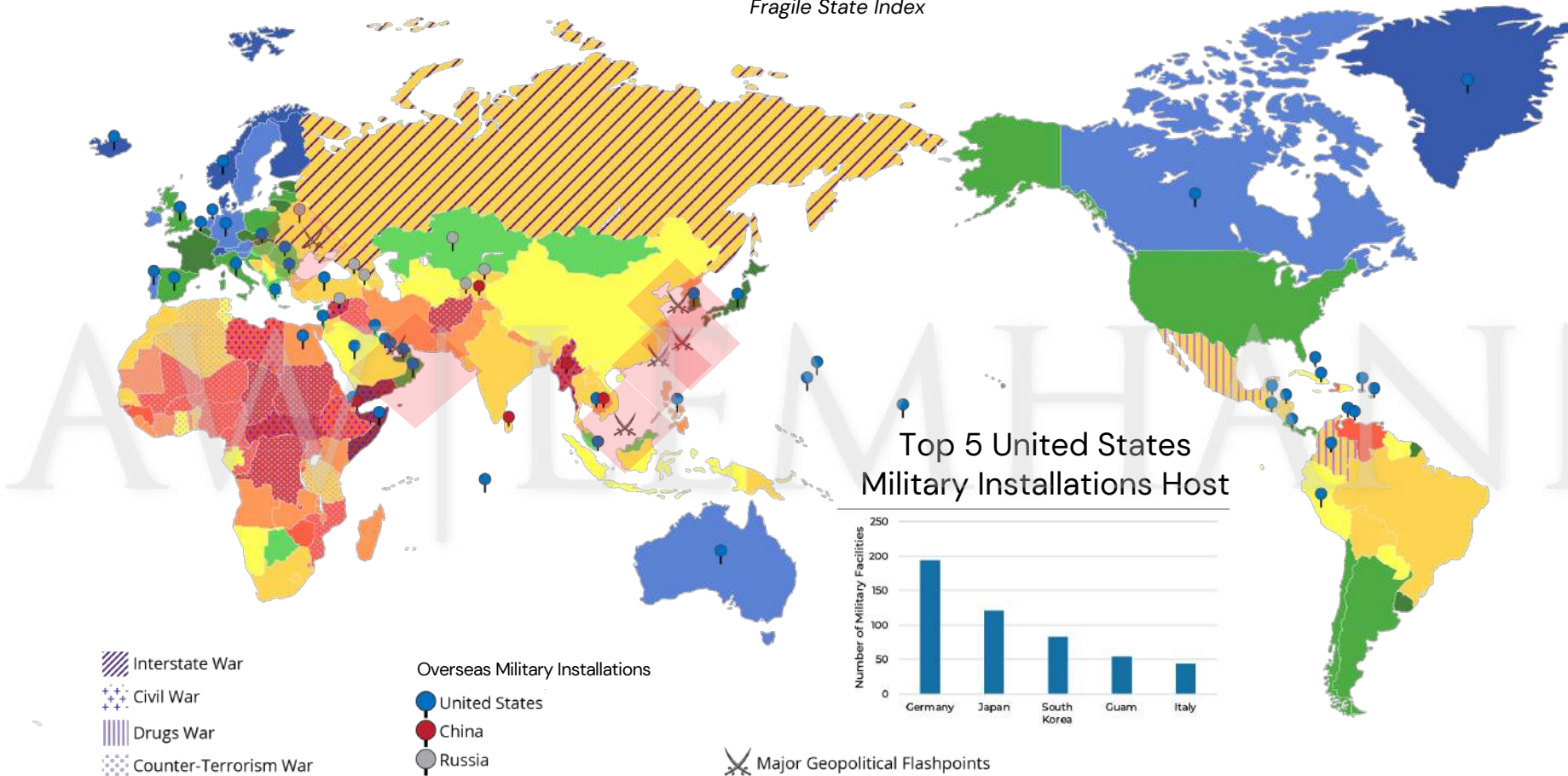
National Intelligence Estimates

- Iran
- North Korea
- Russia
- China

Russia Threats

Russia Unfriendly List

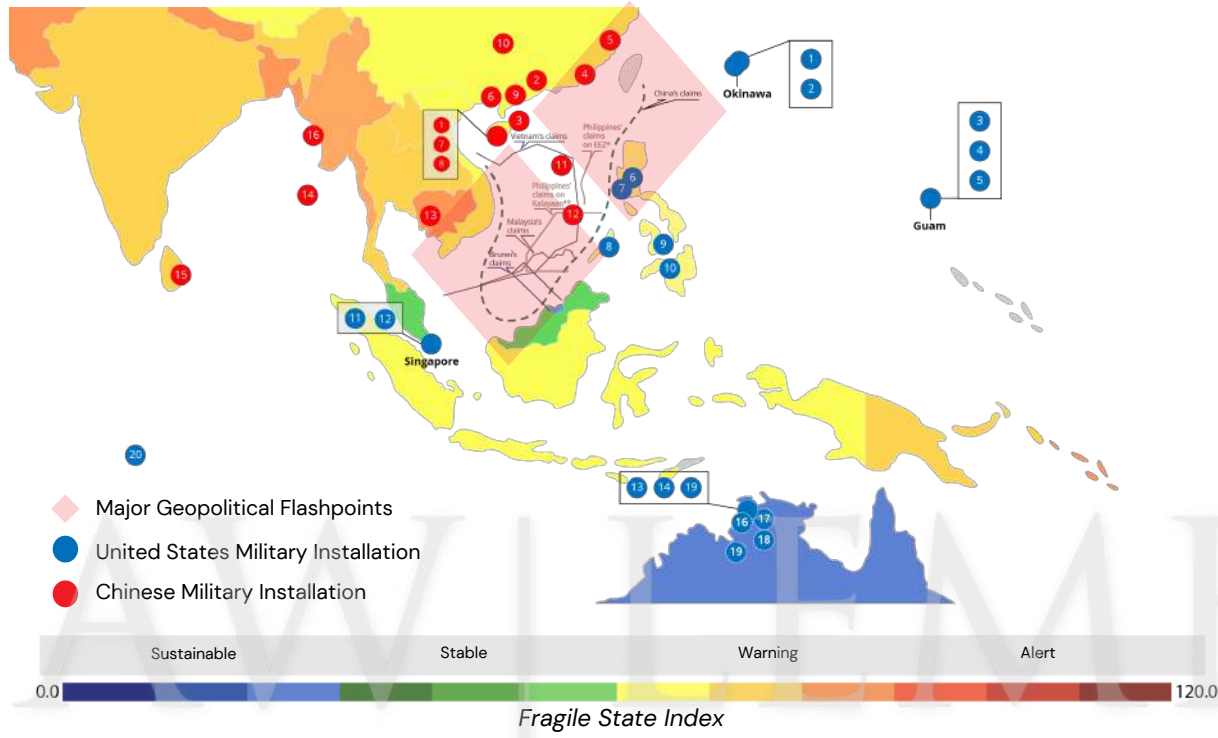
- | | |
|---------------|-----------------|
| ▪ Albania | ▪ Liechtenstein |
| ▪ Andorra | ▪ Luxembourg |
| ▪ Australia | ▪ Malta |
| ▪ Bahamas | ▪ Micronesia |
| ▪ Bulgaria | ▪ Monaco |
| ▪ Canada | ▪ Montenegro |
| ▪ Croatia | ▪ Netherlands |
| ▪ Cyprus | ▪ New Zealand |
| ▪ Czechia | ▪ Macedonia |
| ▪ Denmark | ▪ Norway |
| ▪ Estonia | ▪ Poland |
| ▪ EU | ▪ Portugal |
| ▪ Finland | ▪ Romania |
| ▪ France | ▪ San Marino |
| ▪ Germany | ▪ Singapore |
| ▪ Greece | ▪ Slovakia |
| ▪ Hungary | ▪ Slovenia |
| ▪ Iceland | ▪ Spain |
| ▪ Ireland | ▪ Sweden |
| ▪ Italy | ▪ Switzerland |
| ▪ Latvia | ▪ Taiwan |
| ▪ Lithuania | ▪ Ukraine |
| ▪ Japan | ▪ UK |
| ▪ South Korea | ▪ USA |



Southeast Asia 2023



Southeast Asia Dynamics 2023-2024














Major US and China Military Installation around Southeast Asia

- | | | | |
|--|---|-------------|--------------------------|
| 1 Henoko Base | 11 COMLOG Westpac Navy Base | 1 Yulin | 9 Zhangjiang |
| 2 Futenma Base | 12 Changi Naval Base | 2 Guangzhou | 10 Guiping |
| 3 Joint Region Marianas/ Naval Forces Marianas | 13 RAAF Base Darwin | 3 Haikou | 11 Paracel |
| 4 Andersen Air Force Base | 14 Defence Establishment Berrimah | 4 Shantou | 12 Spartly |
| 5 Naval Base Guam | 15 Robertson Barracks Close Training Area | 5 Mawei | 13 Kroung Preah Sihanouk |
| 6 Fort Magsaysay | 16 Kangaroo Flats Training Area | 6 Beihai | 14 Coco Island |
| 7 Basa Air Base | 17 Mount Bunday Training Area | 7 Lingshui | 15 Hambantota |
| 8 Antonio Bautista Air Base | 18 RAAF Base Tindal | 8 Sanya | 16 Kyaukpyu |
| 9 Mactan-Benito Ebuen Air Base | 19 Bradshaw Field Training Area | | |
| 10 Lumbia Air Base | 19 Diego Garcia | | |

US overseas military installations illustrated on the map are selected military installations with a significant role in Southeast Asia based on the study of IISS Military Balance 2022. On the other hand, China's military installations depicted on the map are the main military installations in Southern Theatre Command and several overseas facilities, be military or quasi-military.

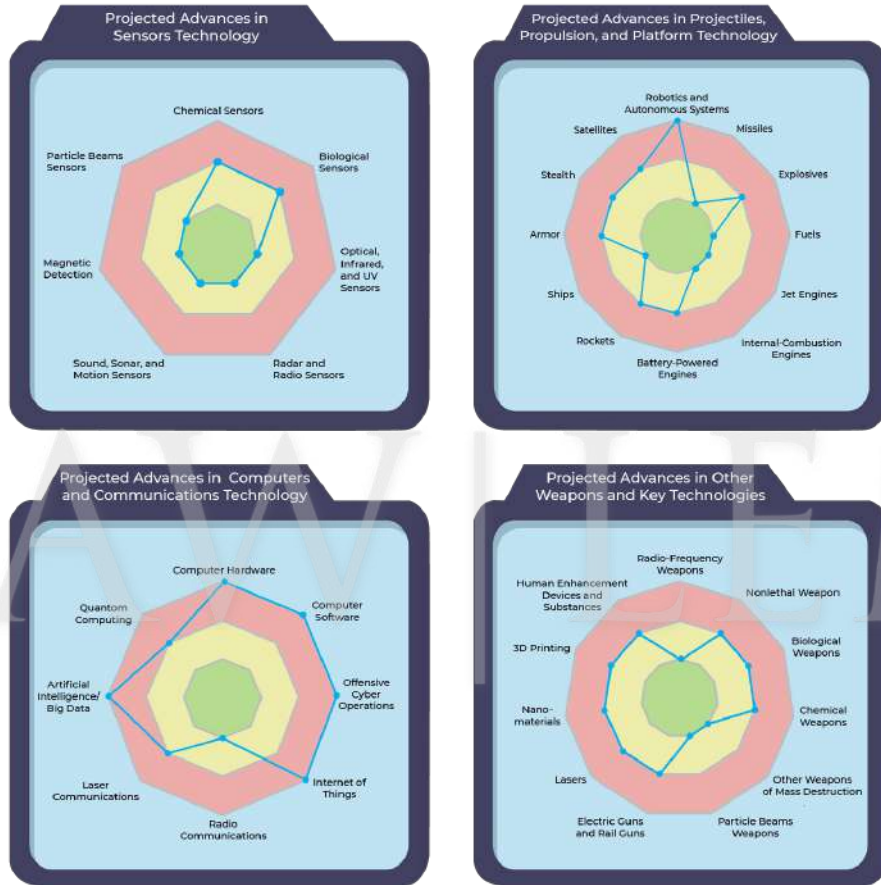
Sources: Adopted from Military Balance+ (2022) and Fund for Peace Fragile State Index (2022)

 Myanmar <ul style="list-style-type: none"> ▪ Ethnic minority persecution ▪ Civil war ▪ General election (Feb & Agu 2023) 	 Vietnam <ul style="list-style-type: none"> ▪ The highest economic growth
 Thailand <ul style="list-style-type: none"> ▪ Growing antipathy towards the government and monarchy ▪ General election (4 Jun 2023) 	 Philippines <ul style="list-style-type: none"> ▪ Economic recession risk
 Malaysia <ul style="list-style-type: none"> ▪ Weak political consolidation ▪ Economic recession risk 	 Laos <ul style="list-style-type: none"> ▪ Hyperinflation ▪ Default risk
 Singapore <ul style="list-style-type: none"> ▪ Digital and Intelligence Service (DIS) 	 Cambodia <ul style="list-style-type: none"> ▪ General election (23 Jul 2023)
 Indonesia <ul style="list-style-type: none"> ▪ General election (14 Feb 2024) ▪ Fiscal and monetary volatility 	 Timor-Leste <ul style="list-style-type: none"> ▪ Integration to ASEAN ▪ Parliamentary election (Mei 2023)
 Brunei <ul style="list-style-type: none"> ▪ Energy market volatility 	

Military Technology Development



Military Technology Projection 2020-2040



Based on the O'Hanlon projection, artificial intelligence/big data, computer hardware and software, cyber operations, the internet of things, and robotics systems will experience major technological revolutionary leaps and disrupt future war characteristics.

Source: O'Hanlon (2018)

Effect of Artificial Intelligence (AI) on Military Operations

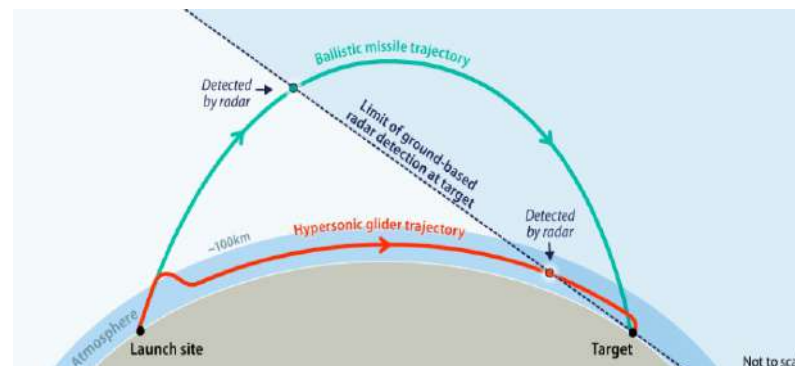
	Land	Sea	Air	Space	Cyber
Sensors	Sensor-laden robotic ground vehicle	Long-Endurance autonomous surveillance	Sensing distributed to unmanned wingmen	AI-enhanced situational awareness in space	AI-enabled cyber-monitoring and triage
C ³ I	Autonomous AI processing; Cooperative human-machine interfaces and augmented decision making				
Effects	<ul style="list-style-type: none"> Armed ground vehicle Intelligent nonkinetic engagement 	<ul style="list-style-type: none"> Autonomous "swarms" of small robotic platform 	<ul style="list-style-type: none"> Autonomous wingmen conducting air-to-air combat 	<ul style="list-style-type: none"> Autonomous antisatellite counter-measures 	<ul style="list-style-type: none"> AI-enabled cyber offense and cyber defense

AI technologies hold great promise for facilitating military decisions, minimizing human casualties and enhancing the combat potential of forces. However, the application of AI in war raises concerns about ethics, such as the principles of distinction and proportionality.

Source: Gons et al (2018)

Hypersonic Weapons

Terrestrial-Based Detection of Ballistic Missiles vs Hypersonic Glide Vehicles



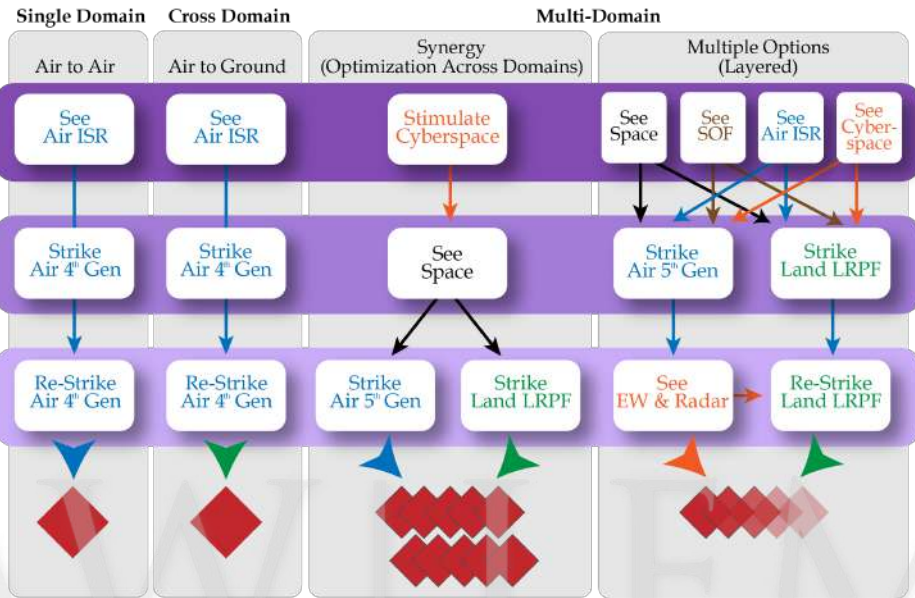
Source: US Air Force (2018)

Hypersonic weapons could challenge detection and defense due to their speed, maneuverability, and low altitude of the flight.

Numerous countries are in the process of developing hypersonic weapons. **The United States, Russia, and China** possess the most advanced hypersonic weapon program.

Military Trend

Multi Domain Operation



Compete (Forward Presence Forces)

- Enable defeat of information in unconventional warfare
- Conduct intelligence & counter adversary reconnaissance
- Demonstrate credible deterrent

Whole of Government

Diplomatic; Economic

Penetrate (Forward Presence & Expeditionary Forces)

- Neutralize and disintegrate key elements of long-range fires
- Contest enemy maneuver forces
- Maneuver from operational and strategic distances

National & District Level Forces

Information Warfare; IRBMs/SRBMs; Cruise Missiles; Cyber; Long-Range SAMs

Disintegrate (Forward Presence & Expeditionary Forces)

- Exploit disintegration of long-range fires
- Neutralize mid-range fires
- Conduct independent operational maneuver
- Conduct deception

Conventional Forces

SRBMs; Mid-Range SAMs; Long-Range Multiple Rocket Launchers

Eksplit (Forward Presence & Expeditionary Forces)

- Exploit disintegration of long-range fires and air defense
- Disintegrate medium-range fires
- Maneuver to positions of advantage
- Isolate and defeat enemy land forces

Conventional Forces

Maneuver; Short-Range Air Defense; Electronic Warfare; Counter-PNT, Cyber

Grey-Zone Conflict



Level of Gray Zone Activities

Level	Characteristics	Example
Aggressive	<ul style="list-style-type: none"> • Direct quasi-military or military action • Significant threat to territorial integrity or sovereignty • Often a clear violation of international law 	<ul style="list-style-type: none"> • Seizing territory in a disputed area
Moderate	<ul style="list-style-type: none"> • Direct action, often in a nonmilitary form • Goal is establishing claims and coercion • Does not immediately threaten the territorial integrity • Legal status of an action is highly contested 	<ul style="list-style-type: none"> • Cyber attack • Ramming vessels in disputed sea • Fishing boat swarms • Economic sanction • Border closing
Persistent	<ul style="list-style-type: none"> • Broad-based, low-level routine actions as part of a campaign • Does not clearly violate international law 	<ul style="list-style-type: none"> • Disinformation campaign

The **Gray Zone** is an operational space between peace and war, involving coercive actions to change the status quo below a threshold that, in most cases, would prompt a conventional military response.

