



**PERSPECTIVES ON
ASEAN DEFENCE SECURITY FORESIGHTING
IN THE NEXT 2 DECADES**



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Emerging Technology

- *The region's high internet penetration and progressive technological advancement does not match with an equal technological capability needed*
- *The Advent of 4IR and the emergence of technologies to widen the cyber threats*
- *The imminent operationalisation of 5G networks would create a next generation threat landscape to the region's security*
- *Data breaches and fake news through social Media affected state relations and heightened risks to international security*



ASEAN IN THE FOURTH INDUSTRIAL REVOLUTION



48.5 Per 100 Persons
Internet Subscribers 2017



Fixed broadband Subscription 2016 7.2 Per 100 Persons



4G Mobile Network Coverage 2017 69.06%



Cellular Phones 2017 147.3 Per 100 Persons

E-Government Development Index 2018



ASEAN average : 0.5729



World average : 0.5479



E-Participation Index 2018



ASEAN average : 0.5843



World average : 0.5654

Source: UN E-Government Knowledgebase

Source: ASEAN Secretariat



ASEAN's Digital Economy

7% of its GDP in 2017, but once tapped could uplift the economy by US\$ 1 trillion by 2025

Source: Bain & Co. 2018

ASEAN's Digital Market to

grow more

than

6x

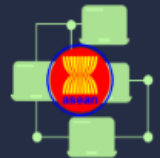
to USD 200 billion by 2025

Source: Google & Temasek Report, 2016



3.8 million users

coming online every month;
fastest growing internet market in the world



260 million users

already online,
4th largest internet market in the world



Online travel expected to reach

US\$ 90 billion by 2025

Source: Google & Temasek Report, 2016

Major Power Interplay in the South China Sea

- *Growing interests of countries outside the region – undertaking of more military and security cooperation*
- *Major powers' competition and influence continues in the region*



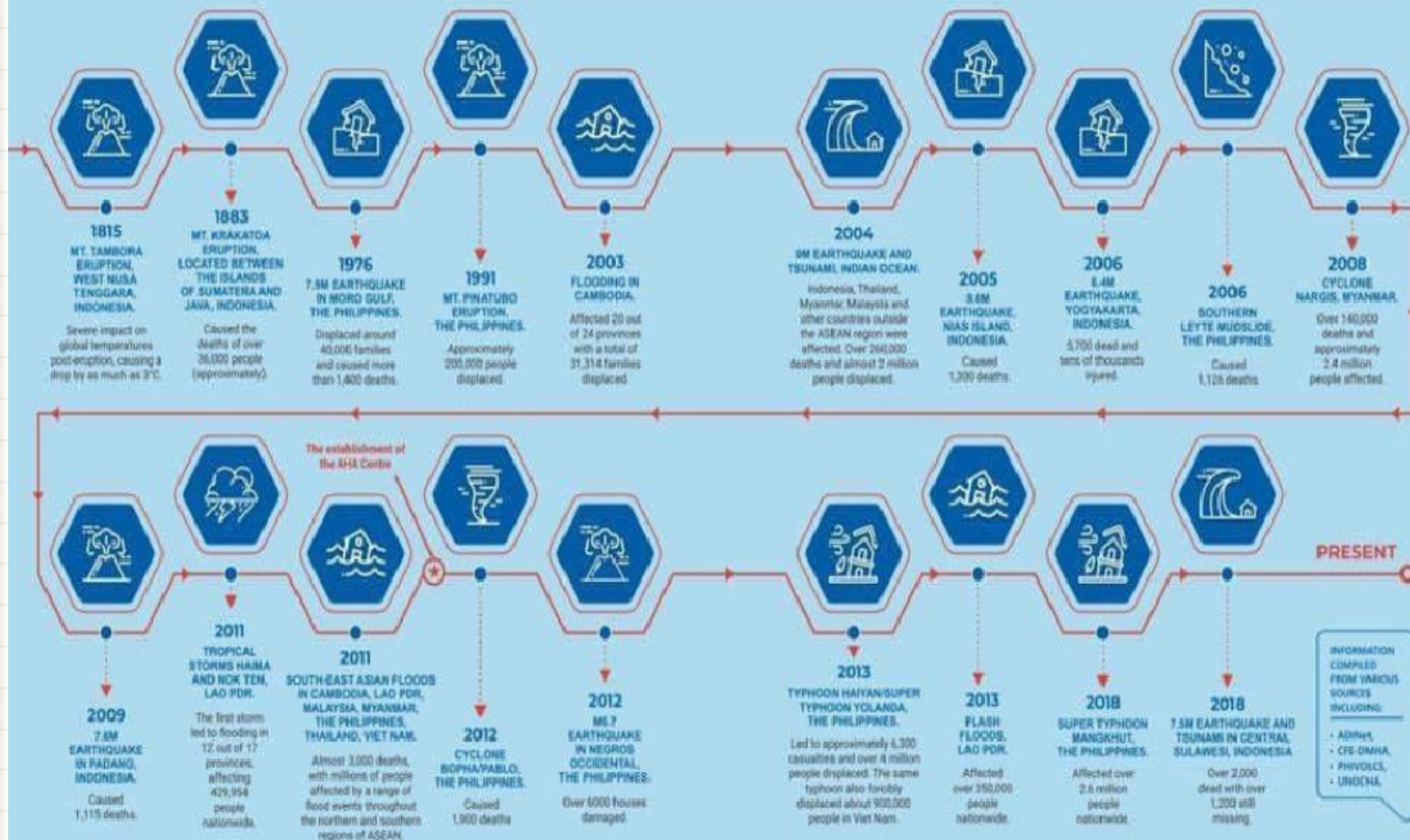
Climate Change

- *Four of the world's ten countries most affected by climate change are located in the Southeast Asia such as Myanmar, the Philippines, Thailand and Vietnam*
- *A study conducted by Asian Development Bank further projected a 4.8 °C rise in annual temperature and a 70 cm rise in sea level by 2100 in Indonesia, the Philippines, Thailand, and Vietnam*
- *the changing and uncertain weather extremes will likely increase climatic-related disasters in the region.*



SOUTHEAST ASIA'S LARGEST RECORDED DISASTERS

It is well-known that ASEAN's position on the renowned 'Ring of Fire', alongside other unique geographical elements, ensure it is one of the most vulnerable and heavily-affected natural disaster regions in the world. The following infographic takes a look back through some of ASEAN's largest and most destructive natural disasters.



INFORMATION COMPILED FROM VARIOUS SOURCES INCLUDING:

- ADPM
- CFS-DMHA
- PHIVOLCS
- UNDRR

Conclusion

The next two decades would unravel opportunities for cooperation in defence and security against a precarious security environment that is unpredictable and increased uncertainty. Policy makers need to take on a coordinated and collaborative approach with relevant stakeholders. It could no longer hold on to traditional top down approach but requires involvement from all levels at the public, private and community level as well as across all sectors with ASEAN in dealing with the security challenges.