

BLUE SECURITY

A MARITIME AFFAIRS SERIES

Creating and Implementing Effective Marine and Blue Economy Policies

Dr. Asmiati A Malik

Prof Bustanul Arifin





BLUE SECURITY

The Blue Security Program engages with and facilitates high quality research on issues of critical maritime security across the Indo-Pacific. Bringing together leading regional experts in politics, international law and strategic studies, Blue Security focuses on three key pillars of maritime security: order, law and power.

Blue Security is a collaboration between La Trobe Asia, Griffith Asia Institute (GAI), University of New South Wales Canberra (ADFA), University of Western Australia's Defence and Security Institute (DSI), United States Studies Centre at the University of Sydney (USSC) and the Asia-Pacific Development, Diplomacy & Defence Dialogue (AP4D).

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Dr Troy Lee-Brown (Defence and Security Institute, University of Western Australia) is the Project Manager and Kate Clayton (La Trobe Asia) leads the emerging scholars program.

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MARITIME AFFAIRS SERIES EDITORS



Professor Bec Strating

Bec Strating is the Director of La Trobe Asia and a Professor of Politics and International Relations at La Trobe University, Melbourne. Her research focuses on maritime disputes in Asia and Australian foreign and defence policy. She has an extensive track record in writing research publications including three monographs, most recently "Defending the Maritime Rules-Based Order" (2020). She is currently a non-visiting fellow at the Royal Australian Navy's Seapower Centre, a member of the East West Centre Council on Indo-Pacific Relations, and chair of the Women in International Security Australia's steering committee. Bec serves on the editorial boards of the Australian Journal of International Affairs and Journal of Maritime and Territorial Studies.



Dr Troy-Lee Brown

Troy Lee-Brown is a researcher in regional security, maritime security and international relations with a focus on the Indo-Pacific. He is currently the editor of the 'Black Swan Strategy Paper' and the project manager for 'Blue Security', a joint DSI-La Trobe Asia-Griffith Asia Institute-UNSW project which focuses on issues of maritime security in the Indo-Pacific. Troy has authored several journal papers with a focus on security issues in the Indo-Pacific, regionalism and maritime security. His research interests include the Indo-Pacific, India, Japan, maritime security, regionalism and climate change.

PRODUCTION COORDINATOR



Kate Clayton

Kate Clayton is a Senior Coordinator (Programs & Research) at La Trobe Asia. Her research areas include Australia, China, the Pacific Islands and the United States. Kate is interested in climate change, geopolitics and conceptions of security in policymaking. For Blue Security, Kate manages the early career researchers' program and is the publication production coordinator. Formally, Kate was a sessional academic in international relations at La Trobe University and the University of Melbourne. She is an alumna of the U.S. State Department's International Visitor Leadership Program, participating in program on enhancing regional maritime governance in the Quad.

MARITIME AFFAIRS SERIES AUTHORS



Dr. Asmiati A Malik

Dr Asmiati Malik is an Assistant Professor at Universitas Bakrie and an Associate at the Institute for Development of Economics and Finance (INDEF), with expertise in International Political Economy, Maritime Policy, and Public Policy. She brings over five years of advisory experience in the Executive Office of the President of the Republic of Indonesia, where she provided strategic guidance on international political economy, regional economics, and political communication. Dr Malik also advises government ministries, international organisations, and foreign governments, with a focus on Geopolitical Dynamics, Marine, and Energy Policy. She holds a PhD in International Political Economy, specialising in Energy and Marine Governance, from the University of Birmingham. An active writer, Dr Malik has published extensively on Indonesia's political and economic development and contributes opinion pieces to media outlets such as Nikkei, The Diplomat, The Jakarta Post, CNN, CNBC, and Kumparan.



Prof. Dr. Bustanul Arifin

Professor Bustanul Arifin is a Professor of Agricultural Economics at the University of Lampung (UNILA), a Senior Economist with the Institute for Development of Economics and Finance (INDEF), and a Professorial Fellow at Bogor Agricultural University (IPB). With over 35 years of experience in research and development strategy, Professor Arifin has consulted for international agencies including the World Bank, UNDP, and USAID.

Professor Arifin holds a PhD in resource economics from the University of Wisconsin-Madison (USA) and a degree in agricultural economics from IPB. He currently serves as the President of the Asian Society of Agricultural Economists (ASAE) and the Indonesian Society of Agricultural Economics (PERHEPI) and advises the Coordinating Minister for Economic Affairs on food policy. His

previous roles include Agriculture and Food Policy Adviser at the Executive Office of the President of the Republic of Indonesia (KSP), Director of INDEF, Adviser to the House of Representatives (DPR), Adviser to the National Team for International Trade Negotiations, Adviser to the Indonesian Chamber of Commerce (Kadin), and Member of the National Innovation Council (KIN).

Professor Arifin has authored 46 books on economics and development issues, including 20 as a sole author, over 80 articles in scientific journals, and more than 100 international and 500 national research papers. He is a well-regarded analyst on economic and development issues, frequently appearing on national television and radio and contributing articles to prominent magazines and newspapers.

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EXECUTIVE SUMMARY

States from across maritime Asia are set to benefit from the “Blue Economy.” Indonesia alone is poised to harness an economic opportunity worth US\$1.365 trillion through its Blue Economy by 2045. Through qualitative analysis of policy documents, regulations, and relevant literature, the study applies a political economy framework to assess the alignment of Indonesia’s Global Maritime Fulcrum (GMF) vision and its Marine and Blue Economy policies. The study critically analyzes Indonesia’s use of maritime terminology and compares it with other countries. This paper argues that different interpretations of associated terms can lead to varying policy outcomes and risks causing confusion in policy interpretation, hindering the effective implementation of maritime strategies. Additionally, there is a risk that Indonesia’s Blue Economy Framework and Roadmap are overly focused on economic growth and not enough on issues of sustainability and security. This narrow focus complicates stakeholder collaboration and undermines the development of a comprehensive maritime strategy. Achieving Indonesia’s maritime ambitions requires a clear and consistent definition of terms, alongside a balanced policy framework that integrates economic, environmental, and security dimensions.

Keywords: GMF, Marine policy, Blue Economy Roadmap



INTRODUCTION

States from across maritime Asia are set to benefit from the “Blue Economy”. The World Bank defines the Blue Economy as the “sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving the health of ocean ecosystem.”¹ Indonesia alone is poised to harness a US\$1.365 trillion economic opportunity through its Blue Economy by 2045.² This potential has been recognized by the National Development Plan and Global Maritime Fulcrum as the cornerstones of the country’s maritime vision. Yet, realizing this vision will require a coherent “joined-up” approach that co-ordinates between the different agencies responsible for maritime policies and strategy.

Indonesia’s Blue Economy Framework 2021 and Blue Economy Roadmap 2023 rightly emphasize sustainability.³ However, there are challenges that might hinder Indonesia’s ability to align its national vision with practical, actionable strategies. This includes terminological inconsistencies, with terms like “maritime” and “marine” being used interchangeably, leading to confusion in policy interpretation and implementation. The Blue Economy Framework could also pay more attention to critical security considerations and to the inclusion of all stakeholders, particularly coastal agriculture, which supports the livelihoods of many fishermen. Without such inclusion of key local communities, the application of the Blue Economy Framework risks being inefficient and incomplete, which would undermine the long-term viability of the Blue Economy. Neglecting maritime

security also leaves the country vulnerable to a range of threats, including illegal fishing, piracy, environmental degradation, and territorial disputes, all of which threaten both economic growth and regional stability.

This paper addresses these issues by adopting a political economy of public policy framework, evaluating the coherence and relevance of Indonesia’s Global Maritime Fulcrum (GMF) with Marine and Blue Economy policies. Through an analysis of public policy inputs, processes, and outcomes, this study assesses how well Indonesia’s strategic objectives align with actual policy implementation. By examining policy documents, regulations, and statistical data, this research offers a critical examination of how effectively the GMF is integrated with Indonesia’s Blue Economy Framework, providing insights that are crucial for improving policy coherence and strategic planning.

Indonesia’s Blue Economy is central to its National Medium-Term Development Plan (RPJMN) 2024–2029 and Long-Term Development Plan (RPJPN) 2025–2045.⁴ However, to realize this vision, a more integrated and inclusive approach is needed—one that balances economic growth with environmental protection, maritime security, and stakeholder inclusion. This brief offers a roadmap for aligning these priorities, ensuring Indonesia’s maritime future is not just ambitious but achievable. By adopting a political economy approach, it provides actionable recommendations to secure long-term prosperity, sustainability, and regional leadership.



INDONESIA'S MARINE OUTLOOK AND THE SIGNIFICANCE OF THE BLUE ECONOMY

Despite the potential benefits of the Blue Economy, a critical assessment of its impact is necessary, particularly in terms of how Indonesia's marine and fishery sectors contribute to the national economy. This evaluation is particularly pertinent given that Indonesia is a vast archipelago of 17,000 islands covering 6.4 million square kilometres, with 62% of its area comprised of seawater.⁵ The marine sector is undeniably a cornerstone of the national economy, playing a fundamental role in Indonesia's development and prosperity. However, recent data from 2022 shows that the marine sector's contribution to Indonesia's Gross Domestic Product (GDP) was relatively low, amounting to only Rp1,551.4 trillion, or 7.92%.⁶ This figure includes substantial contributions from marine energy resources (26.49%), fisheries and aquaculture (25.84%), marine industries (11.73%), marine transportation and supporting activities (9.92%), and marine trade (6.89%) (see Table 1).⁷ These figures underscore the critical roles that marine energy resources and fisheries play within Indonesia's marine sector. Nevertheless, data from 2023 indicates that only 3.74 million households are engaged in these activities, representing approximately 5.29% of the 70.62 million total households in the country.⁸ The Indonesian government defines a 'fishery household' as one engaged in capture fisheries, aquaculture, or other fishery-related businesses.⁹ Nevertheless, this number is significantly lower than the 27.36 million (38.74%) households engaged in agriculture, suggesting that agriculture remains the more prevalent livelihood for Indonesians.¹⁰ Moreover, other factors, such as employment in related marine industries or the impacts of COVID-19, likely influence these figures, complicating a direct comparison between sectors.

Distribution of Marine GDP by Cluster (%) in 2022		
No	Sector	Contribution (%)
1	Marine Energy Resources	26.49
2	Fisheries and Aquaculture	25.84
3	Other Marine Industries	11.73
4	Marine Transportation and Supporting Activities	9.92
5	Marine Trade	6.89
6	Marine Mineral Resources	4.65
7	Marine Tourism	4.11
8	Marine Processing Industry	3.64
9	Marine Services	3.58
10	Marine Construction	1.2
11	Shipbuilding, Maintenance, and Repair Services	0.69

Table 1: Distribution of Indonesia's Maritime GDP by Cluster (%) in 2022¹¹

To comprehensively evaluate the Blue Economy's impact, it is also essential to consider the broader trends in household involvement in these sectors over time. For instance, data shows a significant increase of approximately 37.13% in capture fishery households, from 948 thousand in 2012 to 1.3 million in 2022.¹² Conversely, aquaculture households decreased by 23.35%, from 1.67 million in 2012 to 1.28 million in 2022.¹³ This divergence suggests that while capture fisheries have become more prominent,

aquaculture has faced significant challenges. Overall, the data indicates that there was no significant change in the total number of fishery households over the decade, although a substantial decline of around 27% occurred in 2023.¹⁴ This decline warrants further investigation, as it may be attributed to various factors, including the lingering effects of the COVID-19 pandemic, economic pressures leading to occupational shifts, changes in government household counting methods, and environmental challenges affecting small-scale fishing. Moreover, the data trend over the past 10 years (2012-2022) reveals an average annual increase of just 0.18%, highlighting a lack of significant policy-driven improvements in boosting the number of fishery households.¹⁵ Further analysis indicates that the fishery sector’s GDP growth has stagnated, with an average growth rate of 4.40% between 2016 and 2022, while fishery production increased by only 0.79% (See Table 2 below).¹⁶ These findings collectively underscore the urgent need for a comprehensive re-evaluation of existing policies and strategies to effectively support and expand Indonesia’s fishing industry.

An important factor in evaluating the sector’s performance is the Fisherman Exchange Rate (NTN), which reflects the balance between what fishermen earn from selling their products and what they pay for goods and services.¹⁷ In essence, it measures the purchasing power of fishermen within the broader economy. In 2012, the NTN was 105.27, and in 2023, it was 105.74, indicating minimal change.¹⁸ This stagnation suggests that despite overall sectoral growth, fishermen’s economic welfare has not significantly improved. One potential reason for this could be the persistent inequalities within the sector, where wealthier and better-connected groups capture a disproportionate share of the benefits from fisheries and aquaculture. Research supports the view that economic and social inequalities in Indonesia’s fishery sector contribute to this uneven distribution of gains, which may explain why improvements in fishermen’s welfare have been limited.¹⁹ Despite efforts by the Indonesian government to address these issues, significant challenges and inequalities remain unresolved within the sector.

Indonesia Marine and Fishery Performance 2016-2022									
No	Performance of Maritime Sector Details/year	2016	2017	2018	2019	2020	2021	2022	Mean
1	Marine and Fisheries Community Welfare Index	54	55.86	56.94	57.66	58.31	59.07	61.21	57.58
	Fisherman/Aquaculture Exchange Rates	102.82	104.04	105.98	106.94	100.35	103.97	105.74	104.26
	Fisherman Exchange Rates	108.24	111.01	113.27	113.74	100.22	104.69	106.45	108.23
	Aquaculture Exchange Rate	98.96	99.08	100.8	102.09	100.55	102.83	104.63	101.28
2	Growth Domestic Product (GDP) Fishery (%/year)	5.19	5.7	5.19	5.73	0.73	5.45	2.79	4.40
3	Total Export Value of Fishery (USD Billion)	4.17	4.52	4.86	4.94	5.2	5.72	6.24	5.09
4	Fish Consumption Rate (Kg/kap/year)	43.94	47.34	50.69	54.5	54.56	55.16	56.48	51.81
5	Area of Marine Protected Areas (KKP) that are managed sustainably (million ha)	179	19.1	20.87	23.14	24.11	28.4	28.9	23.20
6	Completion of marine spatial planning and coastal zoning (zoning plan)	16	9	39	38	14	13	34	23.29
7	Fishery Production	22.58	23.19	23.05	22.76	21.81	21.87	24.87	22.88
	Catch Fishery	6.58	7.07	7.36	7.34	6.98	7.22	7.99	7.22
	Aquaculture	16	16.11	15.69	15.43	14.83	14.65	16.89	15.66
8	Salt Production (Million Ton)	1.18	1.11	2.35	2.5	1.06	0.88	0.75	1.40
9	Percentage of Fisheries Management Area [WPPNRI] coverage monitored for illegal fishing activities	28.5	71.05	67.63	52.63	67.8	52.71	n/a	56.72

Table 2: Indonesia Marine and Fishery Key Performance 2016-2022²⁰

DEFINING THE TERMINOLOGY IN MARITIME POLICY

The previous section briefly outlined Indonesia's marine outlook and the role of the Blue Economy. To enhance understanding of Indonesia's maritime policy, we must clarify how the Blue Economy integrates into the country's medium- and long-term plans. This section distinguishes between the marine economy, ocean economy, and Blue Economy, as different interpretations of these terms can lead to varying policy outcomes. We start by exploring the distinctions between 'maritime,' 'marine,' and 'ocean' economies, as these terms influence policy development. The discussion then focuses on the Marine Economy as the core framework, with the Blue Economy playing a key role in Indonesia's broader 'Global Maritime Fulcrum' vision.

MARITIME AS BROADER VISION

The terms 'maritime,' 'marine,' and 'ocean' are frequently used to describe ocean-related activities. To begin with, 'maritime' generally refers to matters related to shipping, naval operations, navigation, and seaborne trade.²¹ Etymologically, the word 'maritime' originates from the French 'maritime' and Latin 'maritimus,' with evidence of its usage dating back to 1550.²² In Bahasa Indonesia, 'maritime' is translated as 'maritim,' encompassing activities connected to the sea, sailing, and ocean trade.²³ In contrast, 'marine' pertains specifically to characteristics of the sea, including elements found in, produced by, or inhabiting the sea.²⁴ The term 'marine' is derived from the French 'marin' and has been in use since 1313.²⁵ In Bahasa Indonesia, 'marine' is adopted as 'kelautan,' which similarly refers to

matters related to the sea.²⁶ Meanwhile, the term 'ocean' is defined as each of the major geographical areas into which the body of saltwater is divided.²⁷ The word 'ocean' comes from the French 'occean' and has been in use since 1300.²⁸ In Bahasa Indonesia, 'ocean' is translated as 'laut,' meaning a vast expanse of water that inundates and separates land masses, such as continents or islands.²⁹ This suggests that the term 'ocean' predates both 'marine' and 'maritime.' Additionally, 'maritime' encompasses a broader range of meanings than 'marine' and 'ocean.' Crucially, 'maritime' is often linked to security-related concepts, while 'marine' and 'ocean' are typically associated with economic and socio-economic contexts.

Understanding these terminological distinctions is essential not only for semantic clarity but also for assessing how different nations apply these concepts within their policy frameworks. The Organisation for Economic Co-operation and Development (OECD) notes that the European Union (EU), Norway, and Spain commonly use the term 'maritime,' while the United Kingdom (UK), Australia, and France prefer 'marine,' and the United States (US) and Ireland use 'ocean.'³⁰ China and other Asian countries typically employ 'maritime' in their policy approaches.³¹ For instance, the UK distinguishes between 'maritime' and 'ocean,' as demonstrated in the "Maritime 2050" strategy introduced in 2019, where 'maritime' represents a broader vision, while 'ocean' pertains to specific sectors.³² Similarly, in 2019, President Xi Jinping introduced the 'Maritime Community with a Shared Future' (MCSF) to advance China's leadership in



ocean governance, as part of the BRI.³³ Likewise, Japan, recognizing itself as an ocean country, adopts a maritime policy orientation focused on maritime trade and security to counterbalance China's influence in the region.³⁴ This orientation was formalized under former Prime Minister Shinzo Abe through the "Free and Open Indo-Pacific Strategy" (FOIPS) since 2016.³⁵ According to Satake and Hosoya, FOIPS is designed to balance China's growing dominance in the Pacific and counter China's BRI.³⁶

India has similarly adopted a maritime-focused vision with the introduction of the 'Maritime India Vision 2030' in 2021, identifying 150 initiatives across maritime sub-sectors such as ports, shipping, and waterways.³⁷ The primary objective of this policy is to strengthen India's position within the global maritime arena.³⁸ In addition to this, India also launched the Indo-Pacific Ocean Initiative (IPOI) in 2019, which aims to promote maritime cooperation and ensure a free, open, and inclusive Indo-Pacific region.³⁹ These examples illustrate that China, India, and Japan use the term 'maritime' to convey a comprehensive and global ocean vision, as well as a strategic policy orientation. When examining the historical timeline, it becomes evident that Indonesia introduced a focused maritime-based vision earlier, followed by Japan and India. This suggests that the development of concrete maritime policies began in the late 1990s, led by China, with Japan, the UK, and India subsequently emphasizing their geopolitical strategies. In the context of ASEAN, the establishment of the ASEAN Maritime Forum (AMF) in 2010 was a significant step toward addressing regional maritime issues.⁴⁰ Building on this, Indonesia

further enhanced maritime cooperation by initiating the ASEAN Maritime Outlook (AMO), a strategic document introduced during the ASEAN 43rd Summit in Jakarta in 2023.⁴¹ The emergence of marine-oriented policy visions among ASEAN countries highlights the growing importance of the maritime sector within the region.

In line with these global trends, Indonesia's policy perspective, similar to those of China and Japan, regards 'maritime' as a comprehensive concept that encompasses all ocean-related activities, both direct and indirect.⁴² Furthermore, in 2016, President Joko Widodo's administration introduced the vision of Indonesia as a 'Global Maritime Fulcrum', structured around five pillars: building Indonesia's maritime culture; securing ocean resources; developing sea infrastructure; strengthening maritime diplomacy; and enhancing maritime power.⁴³ These pillars were later expanded into seven pillars (See Table 3).⁴⁴ A detailed description of the GMF is provided in Presidential Regulation No. 16 of 2017, which outlines Indonesia's ambition to become a maritime nation that is advanced, independent, strong, and capable of making positive contributions to regional and global security and peace, in line with national interests.⁴⁵ Indonesia's GMF was developed in response to China's BRI and Japan's FOIPS.⁴⁶ However, this view is contested, as Indonesia's Broad Guidelines of State Policy 1999-2004 (GBHN), established by the People's Consultative Assembly, had already prioritized maritime and agricultural development.⁴⁷ Moreover, the significance of the ocean to Indonesia's economy can be traced back to the Djuanda Declaration in 1957.⁴⁸

Vision	Indonesia's Global Maritime Fulcrum Action Plan	
Year	2016-2019	2021-2025
Regulation	Presidential Regulation No 16/2017 of Indonesia Marine Policy Action Plan Year 2016- 2019	Presidential Regulation No 34/2022 of Indonesia Marine Policy Action Plan Year 2021- 2025
	<ol style="list-style-type: none"> 1. Building Indonesia's maritime culture; 2. Protecting the sea and marine resources, with a focus on establishing seafood sovereignty through the development of the fishing industry, placing fishermen as the main pillar; 3. Prioritizing the development of maritime infrastructure and connectivity by constructing sea toll roads, deep seaports, logistics, the shipping industry, and maritime tourism; 4. Strengthening maritime diplomacy and cooperation in the marine sector, eliminating sources of conflict at sea such as illegal fishing, sovereignty violations, territorial disputes, piracy, and marine pollution; and 5. Building a maritime defense force to safeguard maritime sovereignty and wealth, as well as ensuring the safety of navigation and maritime security. 	<ol style="list-style-type: none"> 1. Management of Marine Resources and Human Resource Development; 2. Defense, Security, Law Enforcement, and Safety at Sea; 3. Marine Governance and Institutional Management; 4. Marine Economy and Infrastructure and Welfare Improvement; 5. Marine Spatial Management and Marine Environmental Protection; 6. Maritime Culture; and 7. Maritime Diplomacy. <p>Indonesia's Maritime Development Policy also contains six basic development principles:</p> <ol style="list-style-type: none"> 1. Archipelagic Outlook; 2. Sustainable Development; 3. Blue Economy; 4. Integrated and Transparent Management; 5. Participation; and 6. Equality and Equity.

Table 3: Indonesia's Global Maritime Fulcrum Action Plan (Regulation 16/2017; 34/2022)⁴⁹

The term 'maritime' is particularly well-suited to Indonesia due to its unique geographical and cultural conditions. UNCLOS 1982 identifies Indonesia as an archipelagic and maritime nation, reinforcing the relevance of maritime terminology.⁵⁰ This term has also been historically significant, as seen in Indonesia's Broad Guidelines of State Policy 1999-2004 (GBHN), which were later replaced by the National Development Planning System (SPNN).⁵¹ The GBHN 1999-2004 emphasized that Indonesia's economic development should leverage its competitive and comparative advantages as a maritime and agricultural country.⁵² This underscores the formal recognition of a maritime and agriculture-based economy during President Habibie's administration. The National Development Agency, now known as the Ministry of National Development Planning, extended this vision into Indonesia's long-term development plan (RPJPN 2005-2025), although the maritime-based economy had not yet become central to development initiatives.⁵³ Over time, maritime terminology has consistently been used to

articulate Indonesia's broader policy vision, even though the concept was not fully defined until President Jokowi's administration. This emphasizes the significance of the maritime sector in driving Indonesia's economy. Spain, like Indonesia, uses the term 'maritime' to highlight the sector's economic importance.⁵⁴ The consistent use of maritime terminology by countries like Indonesia, Spain, China, Japan, India, and the UK suggests that they view the maritime sector as integral to their national economies. However, it is crucial to recognize that within Indonesia's regulatory and development terminology, there is often no clear distinction between 'marine' and 'maritime.' For instance, regulations may be titled "marine," but the content frequently addresses maritime sectors, including trade and naval operations. This ambiguity presents an area for improvement, where policymakers should more clearly define the scope and distinctions between 'marine' and 'maritime' to prevent potential misinterpretation and policy inconsistencies across sectors.

MARINE AND OCEAN ECONOMY

Scholars have interpreted the concepts of Marine, Ocean, and Blue Economies in different ways, showing varied perspectives on their definitions and applications. The United Nations considers the marine and ocean environments as an integrated ecosystem, as emphasized in SDG 14: Life Below Water, which advocates for the sustainable use of marine resources, seas, and oceans.⁵⁵ At its core, the marine environment, the ocean, and their surrounding areas form a single, interconnected ecosystem. The marine economy encompasses all activities and industries that support marine development.⁵⁶ It distinguishes between narrow and broad perspectives: narrowly defined, the marine economy includes economic activities derived directly from ocean research, while broadly defined, it extends to all activities related to marine resources, including those connected to land-based economies, inland rivers, islands, and coastal areas.⁵⁷ The marine economy encompasses “the whole range of activities related to the sea, whose development depends on the sea”.⁵⁸ Any economic activity, whether direct or indirect, related to the ocean, sea, or coast constitutes a marine economy.⁵⁹ Additionally, the Scottish Government associates the marine economy with both ecological and physical economic activities in the ocean, water, and surrounding environments.⁶⁰ Alternatively, the term “maritime economy,” concerning the management of coastal areas and small islands, interprets the marine economy as including all economic activities along coastlines and on small islands.⁶¹ Despite this interpretation, it does not provide a clear definition or establish a strong linkage with the marine economy. Synthesizing these perspectives, we define the marine economy as encompassing all activities related to the use of marine and coastal resources, including river estuaries.

The concept of the ocean economy shares many similarities with the marine economy, as both include economic activities related to the use of ocean resources. While definitions may vary, many countries reference economic activities associated with marine and ocean environments.⁶² The primary differences in these definitions often arise from the scope of the areas considered. For example, Canada includes not only marine areas but also coastal communities that depend on sea resources for their livelihoods.⁶³ The ocean economy broadly encompasses activities that directly or indirectly utilize ocean resources to produce goods and services.⁶⁴ A key distinction is made between the ocean economy, which focuses on sea-based activities and resources, and the coastal economy, which includes economic activities along shorelines, such as agriculture.⁶⁵ This perspective views the ocean economy as involving economic activities that use resources from oceans, seas, and great lakes. Some perspectives even extend the definition to include activities utilizing both marine and freshwater resources, rather than restricting it to the ocean alone.⁶⁶ Others describe the ocean economy as a distinct segment of national and global economies, typically measured by GDP.⁶⁷ However, caution is advised when applying this framework, as it may be influenced by country-specific contexts. For example, in Bangladesh, this approach may



not fully align with the realities of countries like Indonesia, where maritime contributions are already integrated into GDP measurements⁶⁸. Indonesian scholars define the ocean economy as encompassing economic activities that occur in both oceanic and land areas utilizing sea resources.⁶⁹ The ocean economy includes economic activities in sea and coastal areas that utilize related resources.⁷⁰ These varying definitions among scholars indicate that countries do not share a uniform perception of the ocean economy, likely due to differing geographical conditions and policy approaches. For instance, the U.S. and Ireland take a market-oriented view of the ocean economy, while Canada considers it from a societal and industrial standpoint.⁷¹

In Indonesia, the term “Ocean Economy” is not explicitly defined in the legal framework. Law No. 32/2014 on Maritime Affairs and Government Regulation No. 22/2022 on Job Creation distinguish between “ocean” and “marine” but do not clearly define the ocean economy. Government Regulation No. 22/2022 defines the ocean as the body of water connecting land masses on the Earth’s surface.⁷² Conversely, “marine” (Kelautan) is described in Indonesian law as encompassing all matters related to the sea, including the sea territory, underwater regions, coastal areas, and activities within these zones, which also include the seabed, the water column, the sea surface, and coastal areas and small islands.⁷³ This distinction implies that the Indonesian government uses “marine” (Kelautan) as a broader term to specify policies related to the maritime domain. Furthermore, Government Regulation No. 22/2022 defines marine development as the utilization of ocean resources to foster economic growth, with an emphasis on achieving prosperity and ensuring the sustainability of coastal and marine ecosystems.⁷⁴ Thus, it can be inferred that “marine economy” is a more appropriate term within Indonesia’s policy framework, as it encompasses a wider scope, including ocean, coastal, and shoreline areas, as well as the stakeholders involved in utilizing and deriving income from these resources.

BLUE ECONOMY

Shared understanding of the Blue Economy and associated terminology is crucial for ensuring clarity in policy formation. A well-defined understanding helps prevent the creation of confusion, policy hype, and the misuse of buzzwords or marketing gimmicks that could divert focus from the Blue Economy's original purpose. The concept of the Blue Economy originates from Pauli's work, which advocates for leveraging knowledge and technology to sustainably develop marine and ocean resources while promoting a circular economy to address environmental degradation.⁷⁵ This concept gained global recognition at the 20th United Nations Conference on Sustainable Development in Rio de Janeiro in June 2012, where the Blue Economy Concept was introduced.⁷⁶ The paper emphasized the need to redefine institutional frameworks to support sustainable development.⁷⁷ Furthermore, the Blue Economy is understood as an integrated approach that connects land and ocean development, highlighting the importance of harmonizing terrestrial and marine policies within a cohesive framework.

An example of this integrated approach is the World Bank's PROBLUE Initiative, which illustrates the Blue Economy as encompassing sustainable and integrated ocean activities that ensure the health and balance of marine ecosystems while harnessing them for economic development.⁷⁸ This includes promoting sustainable fisheries, addressing marine pollution, utilizing oceanic sectors, and enhancing government capacity to manage marine resources effectively.⁷⁹ Similarly, the OECD defines the Blue Economy as the sustainable use of ocean resources to enhance social livelihoods, drive economic growth, and create jobs, all while ensuring the preservation and health of marine ecosystems.⁸⁰ The Blue Economy can be understood as the shared benefits derived from the sustainable industrialization of ocean resources⁸¹ and it involves the sustainable use of ocean resources while maintaining the health of marine ecosystems.⁸² Several key activities can be associated with the Blue Economy, including the extraction, utilization, and trade of both living and non-living marine resources, which contribute to economic growth and have environmental impacts.⁸³ The Blue Economy is also viewed as a strategy for achieving economic growth through the responsible use of ocean and inland water-based resources while ensuring the sustainability of marine ecosystems.⁸⁴ Further supporting these perspectives, the Indonesian government defines the Blue Economy as "the sustainable use of ocean resources for economic growth, improved livelihoods and jobs, and ocean ecosystem health."⁸⁵

Article 14 of Indonesia's Law No. 32/2014 on Marine Affair Policy defines the Blue Economy as "an approach to promoting sustainable marine management and the conservation of marine and coastal resources

and their ecosystems to generate economic growth through community engagement, resource efficiency, minimizing waste, and diversifying income sources."⁸⁶ The regulation further elaborates the Blue Economy as a development model that integrates land and marine-based activities, while considering the environmental carrying capacity.⁸⁷ The Ministry of Fisheries' Annual Report also underscores that the Blue Economy focuses on sustainable ocean resource use to achieve economic growth while safeguarding marine ecosystems.⁸⁸ Indonesia's interpretation of the Blue Economy aligns closely with ASEAN's, which emphasizes an inclusive and sustainable approach that integrates multiple sectors and stakeholders, generating value from oceans, seas, and freshwater resources to fuel future economic growth.⁸⁹ Although Indonesia and ASEAN share similar views, there are slight differences in scope—ASEAN includes inland waters and landlocked areas in its definition.

The discussion reveals a strong consensus among scholars and policymakers that the Blue Economy represents both sustainable and equitable development, referred to here as the Sustainable Blue Economy. The main distinction lies in the scope, particularly between ocean, inland water, and coastal areas. A holistic understanding of the Sustainable Blue Economy is crucial to avoid incoherent policy development. If restricted to ocean and marine-based activities, considerable efforts would be needed to integrate policies across different sectors. While SDG 14 primarily focuses on the marine environment, the minimal attention given to inland waters in SDG 6 (Water and Sanitation) and SDG 15 (Freshwater Ecosystems) suggests that these areas must also be integrated into the framework, given their vital role in supporting livelihoods through rivers and lakes.

Building on this understanding of the Marine and Ocean Economy, it becomes evident that the Blue Economy serves as a normative framework within the broader Marine Economy, playing a crucial role in Indonesia's maritime vision. As a normative framework, it requires that all policy designs adhere to principles of sustainable and equitable development, as outlined in Presidential Regulation No. 34/2022. Therefore, the Blue Economy is intended to ensure the sustainability and security of ocean, coastal, and inland water resources for societal welfare. A key element of this framework is security, as sustainable resource management is nearly impossible without it. Additionally, sustainability as a normative framework demands public awareness, which is more likely in countries with higher levels of education and income, where environmental consciousness and legal compliance are more prevalent. Even in such contexts, however, potential external threats from other countries highlight the need to integrate sustainability with security—an argument that will be expanded upon in the subsequent sections.

INDONESIA'S SUSTAINABLE BLUE ECONOMY

In the previous section, this paper examined the terminologies of maritime, marine economy, and the Blue Economy. Building on that foundation, this section integrates these concepts within the framework of a Sustainable Blue Economy as envisioned under GMF strategy.

The regulatory perspective on the Sustainable Blue Economy was first introduced in 2014 during Susilo Bambang Yudhoyono's (SBY) administration. In his speech at the High-Level Leadership Platform at Rio+20 in 2012, SBY emphasized that "the Blue Economy is an integral part of the green economy, which is our common objective. For me, the Blue Economy is our next frontier."⁹⁰ This vision was subsequently formalized through Article 14 of Law No. 32/2014 on Marine Affairs Policy, which mandates both central and regional governments to manage marine resources based on the principles of sustainability and economic prosperity through the Blue Economy.⁹¹ This policy direction was further reinforced under Joko Widodo's (Jokowi) administration. At the 9th ASEAN Summit in Myanmar, Jokowi introduced the GMF strategy,

which is anchored on five main pillars, reflecting a strong commitment to sustainable maritime-based development.⁹² To realize the GMF, Jokowi's administration introduced several key documents, including the RPJMN 2014-2019, RPJMN 2020-2024, the 2021 Blue Economy Development Framework to support Indonesia's sustainable economic transformation, the Indonesia Blue Economy Roadmap, the RPJPN 2025-2045, and the Technocratic Design RPJMN 2025-2029 (refer to Table 4).⁹³ Moreover, the government established a regulatory foundation with Law No. 23/2014 on Marine Affairs Policy, Presidential Regulation No. 16/2017 on Marine Affairs Policy, Government Regulation No. 02/2022 on Job Creation, and Law No. 6/2023, which solidifies Government Regulation in Lieu of Law No. 2/2022 on Job Creation into law (refer to Table 4).⁹⁴ This progression demonstrates a strong policy continuity from President SBY to President Jokowi. Furthermore, the extensive list of policy documents outlined in Table 4 suggests that the Indonesian government is making significant efforts to strengthen its maritime policy framework with a clear focus on sustainability.



Document, Regulatory Basis, Strategic Action Plan and Stakeholders in Indonesia's Maritime Policy (1999 - 2045)			
No	Year	Policy/Regulation Document	Content
1	1999	GBHN 1999 - 2004	<ul style="list-style-type: none"> The Broad Guidelines of State Policy emphasize the importance of maritime and agricultural sectors
2	2005	RPJP 2005 - 2025	<ul style="list-style-type: none"> The Long-Term Development Plan emphasizes a maritime-based economy.
3	2014	Law No.32/2014 about Marine Affair Policy	<ul style="list-style-type: none"> Regulates marine development, including distinguishing between ocean and marine sectors, and defining the Blue Economy. Provides a legal basis for the establishment of the Indonesia Maritime Security Agency.
4	2014	RPJMN 2014-2019	<ul style="list-style-type: none"> Medium Development Plan explores the development of the Maritime and Marine Economy
5	2017	President Regulation No.16/2017 about Marine Affair Policy	<ul style="list-style-type: none"> Provides a legal basis and national guidelines for maritime policy. Emphasizes the GMF vision.
6	2020	RPJMN 2020-2024	<ul style="list-style-type: none"> Emphasizes sustainability in ocean resource management.
7	2021	Ministry of Development Planning designs Blue Economy Development Framework for Indonesia's Economic Transformation	<ul style="list-style-type: none"> The document is a collaborative effort with the OECD to establish a solid foundation for policy design in the Blue Economy, aligned with the RPJMN 2020-2024 and the RPJPN 2005-2025.
8	2022	Government Regulation No.02/2022 about Job Creation	<ul style="list-style-type: none"> Defines ocean, marine, maritime state, and marine development.
9	2023	Law (UU) No. 6/2023 concerning the Stipulation of Government Regulations in Lieu of Law No. 2/2022 concerning Job Creation into Law	<ul style="list-style-type: none"> Expands the legal basis to include coastal areas, marine zones, and conservation.
10	2023	Ministry of Development Plan designs Indonesia Blue Economy Roadmap	<ul style="list-style-type: none"> The document consolidates policies, programs, and activities into the Blue Economy Roadmap to realize sustainable maritime economies.
11	2024	RPJPN 2025-2045	<ul style="list-style-type: none"> Indonesia's Long-Term Development Plan clearly emphasizes the importance of the Marine and Blue Economy.
12	2024	Technocratic design RPJMN 2025-2029	<ul style="list-style-type: none"> Development of the Blue Economy as a source of growth.
13	Specific Regulations Related to the Blue Economy:		
	<ol style="list-style-type: none"> 1. Law No. 5 of 1990 concerning the Conservation of Living Natural Resources and Their Ecosystems. 2. Law No. 26 of 2006 concerning Spatial Planning. 3. Law No. 30 of 2007 concerning Energy. 4. Law No. 45 of 2009 concerning Fisheries, amending Law No. 31 of 2004. 5. Law No. 10 of 2009 concerning Tourism. 6. Law No. 1 of 2014 concerning the Management of Coastal Areas and Small Islands, amending Law No. 27 of 2007. 7. Law No. 3 of 2014 concerning Industry. 8. Law No. 23 of 2014 concerning Local Government. 9. Law No. 32 of 2014 concerning the Sea. 10. Law No. 7 of 2016 concerning the Protection and Empowerment of Fishers, Fish Cultivators, and Salt Farmers. 		

Document, Regulatory Basis, Strategic Action Plan and Stakeholders in Indonesia's Maritime Policy (1999 - 2045)		
14	Strategic Action Plans of Indonesia Blue Economy Development Phases I	Actors/Stakeholders
1.	Improving health, resilience, and productivity of maritime resources, including in climate change mitigation and adaptation	<p>15 ministries and 7 non-ministerial government agencies.</p> <p>Coordinating Ministry of Maritime Affairs and Investment, Coordinating Ministry for Economic Affairs, Coordinating Ministry for Politics, Law, and Security, Ministry of National Development Planning, Ministry of Finance, Ministry of Agrarian Affairs and Spatial Planning, Ministry of Marine Affairs and Fisheries, Ministry of Environment and Forestry, Ministry of Industry, Ministry of Education, Culture, Research and Technology, Ministry of Transportation, Ministry of Energy and Mineral Resources, Ministry of Home Affairs, National Standardization Agency, National Research and Innovation Agency, Statistics Indonesia, Meteorological and Geophysical Agency, Local Governments</p>
2.	Uplifting sustainable economic growth of the traditional sectors and emerging sectors in the blue economy	<p>15 ministries and 4 non-ministerial government agencies.</p> <p>Coordinating Ministry of Maritime Affairs and Investment, Coordinating Ministry for Economic Affairs, Ministry of Marine Affairs and Fisheries, Ministry of Industry, Ministry of National Development Planning, Ministry of Education, Culture, Research and Technology, Ministry of Manpower, Ministry of Trade, Ministry of Tourism and Creative Economy, Ministry of Investment, Ministry of Finance, Ministry of Transportation, Ministry of Energy and Mineral Resources, Ministry of Public Works and Housing, Ministry of Environment and Forestry, National Standardization Agency, National Research and Innovation Agency, Statistics Indonesia, Local Governments</p>
3.	Increasing equality and welfare the blue economy stakeholders to achieve just transition	<p>14 ministries and 3 non-ministerial government agencies or entities.</p> <p>Coordinating Ministry of Maritime Affairs and Investment, Coordinating Ministry for Human Development and Culture, Coordinating Ministry for Economic Affairs, Ministry of Marine Affairs and Fisheries, Ministry of Education and Culture, Ministry of Manpower, Ministry of Industry, Ministry of National Development Planning, Ministry of Finance, Ministry of Energy and Mineral Resources, Ministry of Women's Empowerment and Child Protection, Ministry of Youth and Sports, Ministry of Social Affairs, Ministry of Home Affairs, National Standardization Agency, National Research and Innovation Agency, Local Governments</p>
4.	Strengthening the enabling ecosystem including governance, financing, and infrastructure	<p>21 ministries and 3 non-ministerial government agencies.</p> <p>Coordinating Ministry of Maritime Affairs and Investment, Coordinating Ministry for Economic Affairs, Coordinating Ministry for Politics, Law, and Security, Coordinating Ministry for Human Development and Culture, Ministry of Marine Affairs and Fisheries, Ministry of Environment and Forestry, Ministry of Telecommunication and Informatics, Ministry of Agrarian Affairs and Spatial Planning, Ministry of National Development Planning, Ministry of Finance, Ministry of Home Affairs, Ministry of Foreign Affairs, Ministry of Education, Culture, Research and Technology, Ministry of Telecommunication and Informatics, Ministry of Energy and Mineral Resources, Ministry of Manpower, Ministry of Trade, Ministry of Investment, Ministry of Transportation, Ministry of Industry, Ministry of Tourism and Creative Economy, National Standardization Agency, National Research and Innovation Agency, Local Governments</p>

Table 4: Document and Regulatory Basis in Indonesia's Maritim and Blue Economic Policy (Data is taken and constructed from multiple sources: GBHN, 1999; RPJPN, 2005; RPJMN, 2014, RPJMN 2020, RPJMN 2024; RPJPN 2024)⁹⁵

Table 4 presents a chronological overview of various maritime legislation and policy documents from 1999 to 2045, strongly indicating Indonesia's sustained commitment to a sustainable maritime sector. These documents outline concrete medium- and long-term policy plans. The general policy orientation, derived from the President's vision and mission, is designed by Bappenas after conducting a series of studies and consultations with various stakeholders.⁹⁶ These policy documents specify the main responsibilities of each government institution. Subsequently, these institutions develop and design programs to achieve the general targets outlined in development documents such as the RPJMN. For instance, to implement the strategic actions in Phase 1 of the Sustainable Blue Economy, the government must collaborate with more than 26 government bodies (see Table 4).⁹⁷ This extensive collaboration sometimes leads to miscommunication and policy dynamics in the field. Often, the Executive Office of the President of Indonesia is required to accelerate programs, monitor progress, and address bottlenecks.⁹⁸ While coordinating ministries exist, many cross-sectoral programs demand significant intervention. Effectively managing this process requires Bappenas to clearly define the scope and roles of each government institution in the development plan, which could help minimize egocentrism among ministries and government agencies.

Building upon this robust policy framework and the intricate collaboration outlined in Table 4, the Sustainable Blue Economy framework is poised to serve as the cornerstone for aligning policy planning and implementation with Indonesia's medium- and long-term development strategies (refer to Indonesia's Global Maritime Fulcrum Action Plan Table 3). The Sustainable Blue Economy framework will serve as the foundation for policy planning and implementation aligned with RPJMN and RPJPN development strategies. RPJMN refers to a 5-year medium-term development plan, while RPJPN

outlines a 20-year long-term development plan, both of which are designed by Indonesia's Ministry of National Development Planning.⁹⁹ During the G20 Summit in Bali in 2022, the Indonesian government established the National Blue Agenda Actions Partnership (NBAAP) in collaboration with 12 development partners and eight UN agencies.¹⁰⁰ The primary objective of NBAAP is to accelerate the government's Sustainable Blue Economy targets outlined in the RPJMN 2020-2024.¹⁰¹ NBAAP has identified four priority programs: Sustainable Blue Food, Marine and Coastal Ecosystem Restoration, Innovative Financing Schemes, and Blue Infrastructure.¹⁰² These initiatives support an inclusive Sustainable Blue Economic Agenda through four key action partnerships: Blue Health, Blue Food, Blue Finance, and Blue Innovation, encompassing 93 programs and nine key priorities.¹⁰³ However, many medium-term targets have yet to be met due to the lack of definitive program designs to achieve desired outcomes. Furthermore, these priorities are critical for marine development as they are directly linked to ecological preservation and the well-being of stakeholders.

Numerous studies underscore the critical role of stakeholders in advancing the Sustainable Blue Economy.¹⁰⁴ Consequently, it is imperative for the Indonesian government to intensify its efforts in this area. Hidayat highlights that the National Blue Agenda Actions Partnership (NBAAP) identified two main targets in the RPJMN 2020-2024—bathymetry mapping and an ocean quality index—that lack corresponding programs.¹⁰⁵ Bathymetry mapping is used to measure the physical features and shape of a water body. It helps identify waves, tides, currents, and chemical aspects of the water.¹⁰⁶ This indicates that some government targets in the RPJMN remain unaddressed due to the absence of dedicated programs to implement them. Additionally, there are ten specific regulations related to the Sustainable Blue Economy, but they are explicitly mentioned only in Law No. 32/2014 concerning Marine Affairs Policy (see Table 4,



No. 13). The presence of numerous cross-sectoral regulations, which are managed separately, often leads to overlaps, complicating and delaying the design and implementation of relevant programs. In an effort to accelerate the adoption and implementation of the Sustainable Blue Economy, the Indonesian government has undertaken preliminary studies. The Sustainable Blue Economy Framework, resulting from collaborative efforts between Indonesia's Ministry of National Development Planning and the OECD, was developed based on these studies.¹⁰⁷ To operationalize this framework, Bappenas introduced the Indonesia Blue Economy Roadmap 2023-2045 in 2023.¹⁰⁸ This roadmap consolidates policies, programs, and activities supported by all stakeholders and provides a structured approach to achieving a Sustainable Blue Economy.¹⁰⁹ Furthermore, the roadmap aligns with Indonesia's Vision 2045, detailing relevant policy instruments that serve as the foundation for its implementation, particularly in realizing Indonesia as a sovereign, advanced, and resilient archipelagic nation.¹¹⁰

The Indonesia Blue Economy Roadmap outlines key issues and projections for the Sustainable Blue Economy, identifying priority sectors supported by forward-looking policies and emphasizing the importance of robust stakeholder collaboration.¹¹¹ This roadmap represents an initial step toward addressing RPJMN targets that have yet to be fully translated into actionable policy programs. However, challenges persist in fostering strong governmental collaboration due to the involvement of numerous stakeholders in marine-related management, including 18 central government ministries and local governments across 38 provinces, 514 regencies, 98 cities, 7,277 districts, and 83,763 villages.¹¹² The effective implementation of Indonesia's Sustainable Blue Economy Roadmap hinges on robust stakeholder collaboration, which is currently challenged by the involvement of 26 ministries and 18 government agencies, each with its own objectives and priorities.¹¹³ This fragmentation not only complicates policy design and implementation but also creates inefficiencies in resource allocation, as seen in the misalignment between the Ministry of Fisheries' goals and those of other maritime agencies. For instance, the Ministry of Fisheries may prioritize increasing fishery production, while the Ministry of Environment focuses on conservation, leading to conflicting agendas that hinder the achievement of holistic Sustainable Blue Economy goals. Moreover, the lack of integration among these stakeholders contributes to the roadmap's overemphasis on economic outcomes, such as boosting GDP and employment, while neglecting critical security concerns (See Table 1).¹¹⁴ The omission of a comprehensive maritime security strategy—integrating efforts from the Ministry of Defence, Water Police, and the Maritime Security Agency—poses significant risks. Without a coordinated approach to security, the economic gains targeted by the Sustainable Blue Economy are vulnerable to threats such as illegal fishing, piracy, and environmental degradation. This disconnect underscores the need for a legal and policy framework that not only aligns economic and environmental objectives but also ensures the protection of Indonesia's maritime sovereignty. To address these issues, the Indonesian government must prioritize the development of a clear, integrated policy framework that facilitates collaboration among all relevant stakeholders.

This would involve not only aligning the goals of various ministries but also ensuring that security considerations are embedded within the Sustainable Blue Economy initiatives. Such an approach would not only enhance policy coherence but also strengthen the overall resilience of Indonesia's maritime sector.

In response to these challenges, the government has introduced the Omnibus Law to address overlapping regulations and simplify regulatory frameworks, including those related to the marine sector.¹¹⁵ This law was eventually replaced by Government Regulation No. 2/2022 on Job Creation, which was later revoked by Law No. 6/2023 (see Table 2). Despite these efforts, challenges persist, particularly in translating the law into technical regulations and guidelines. This often leads to fragmented policy and program design across different ministries, making it more difficult to monitor and measure their impact. Additionally, Indonesia's Sustainable Blue Economy Framework and Roadmap are heavily focused on economic and sustainability aspects of marine economies but fail to adequately address the nature and culture of stakeholders, including vulnerable groups such as fishers and fishing crews. For example, many fishers work part-time and shift to farming during the low-wave season. Therefore, it is equally important to address coastal agriculture, as it is integral to the livelihoods of coastal communities.

In Indonesia's Sustainable Blue Economy Roadmap developed by Bappenas, there is a brief mention in the action plans regarding the development of technology, irrigation, and seeds for coastal agriculture, along with providing technical assistance for transitioning to ecotourism and agriculture.¹¹⁶ However, the document lacks detailed explanations or clear definitions of coastal agriculture, a relatively new concept for Indonesian policymakers. Despite earlier mentions of maritime and agriculture as engines of growth in the GBHN 1999-2004, these ideas were not elaborated into specific policy designs. The concept of AgroMaritim integrates land, water, and air resources to drive economic development, particularly in Indonesia's frontier economies such as villages and small islands.¹¹⁷ However, this concept differs from coastal agriculture, which is characterized by unique challenges such as saline soils, low nutrients, high evaporation rates, and sandy textures.¹¹⁸ Despite these challenges, technological advancements and community empowerment can transform these lands into productive soils. Coastal agriculture offers favorable conditions where land meets the sea, including estuaries and watershed areas.¹¹⁹ Examples from countries with similar conditions show successful agricultural practices in arid soils, demonstrating the potential for transforming coastal lands.¹²⁰ In Indonesia, regions like the Sulawesi Islands, Maluku, and Papua practice coastal agriculture, with communities in areas like Selayar, South Sulawesi, relying on crops cultivated in coastal areas for their livelihoods.¹²¹ This highlights the significant role of agriculture in sustaining coastal communities. This underscores the significant role of agriculture in sustaining coastal communities. The limited focus on coastal agriculture in the Sustainable Blue Economy Roadmap risks neglecting the diverse livelihoods of coastal populations, most of whom do not rely solely on ocean-based products. This research will further explore and address these gaps in subsequent discussions.

BUILDING A HOLISTIC FRAMEWORK OF GMF, MARINE, AND SUSTAINABLE BLUE ECONOMY

This section will explore the relationships and coherence between the GMF, Ocean Policy, and Sustainable Blue Economy frameworks. As discussed earlier, maritime terminology is broader than marine/ocean and Blue Economy terminology, encompassing a wider scope. Consequently, any policy based on maritime terminology implies a more comprehensive approach.

The term ‘ocean’ refers specifically to saltwater economies, while ‘marine’ covers a broader range, including oceans, coastal areas, watersheds, estuaries, and inland waters. In Indonesia’s policy documents, the terms primarily used are marine and maritime policy. Meanwhile, the Blue Economy is considered a development principle (refer to Table 2), which implies that all development programs related to the marine sector should be grounded in sustainability. Therefore, the Blue Economy is not a program in itself; instead, it serves as the moral compass and ethical foundation for programs based on sustainability principles. However, in Bappenas’ policy documents, the Blue Economy is interpreted as a concept, strategy, framework, and targeted agenda/program. This suggests that, from a regulatory perspective, the Sustainable Blue Economy represents the guiding spirit of the legislation, which is then elaborated into concrete strategic designs by Bappenas. These policy documents are further adapted into detailed programs by various ministries. Given this context, the formulation of Indonesia’s Blue Economy necessitates revisiting and redefining the Sustainable Blue Economy, particularly from a regulatory standpoint.

To gain a comprehensive understanding of this framework, it is essential to define what sustainability entails. Sustainability is not an absolute concept but depends on the subject, object, and an agreed-upon system relevant to spatiotemporal contexts.¹²² This implies that resources should be used wisely, considering the rights of future generations. Sustainability involves a relationship between humans and the environment that ensures natural capital is preserved for future generations.¹²³ It emphasizes aspects such as continuation, future orientation, and the relationship between society and the environment.¹²⁴ Sustainability should be viewed as

both an ethical value and a relational concept, serving as a principle that balances the environment, society, and future generations. Additionally, sustainability requires finding a balanced relationship between the economy, society, and the environment, incorporating both physical aspects and ethical attitudes. This relationship also involves stakeholders who may impact or be impacted by society, the environment, and technology.¹²⁵ Therefore, sustainability can be seen as a multi-faceted relationship between the environment, society, the economy, and any stakeholders who might be involved or affected.

Sustainability, as an independent concept, is not clearly defined in Indonesia’s regulations. Instead, it is framed in terms of how the state perceives sustainable development. Law No. 6/2023 concerning the Determination of Government Regulations in lieu of Law No. 2/2022 on Job Creation, in Article 2, paragraph 3, defines sustainable development as a conscious effort and planning that integrates environmental, social, and economic aspects into development strategies to ensure the integrity of the environment, security, capability, welfare, and quality of life for current and future generations.¹²⁶ This demonstrates that sustainability involves a complex relationship between the state, society, future generations, the environment, and the market. Based on this understanding, an appropriate framework for the Blue Economy should integrate the relationships between the state, market, and society.¹²⁷ This approach aligns with Indonesia’s economic foundations, which are based on a state-centered development model.¹²⁸ Therefore, the role of institutions in designing the rules, norms, and regulations is crucial. The rules can be effectively implemented only if the actors involved consider them important.¹²⁹ A strong relationship between the state, society, and the market is essential to ensure environmental sustainability. In this context, the motives of each actor—with the state focusing on securing power, society on welfare, and the market on profit—must be balanced within the framework. A framework that is heavily based on an economic (market-oriented) perspective, particularly neoclassical approaches, will likely fail to capture the behavior of other actors in the Blue Economy.

INSTITUTIONAL DESIGN OF MARITIME POLICY

To address these complexities, this paper proposes a holistic approach based on the triangular relationship between the state, market, and society to comprehensively understand the GMF, Marine Economy, and Blue Economy in Indonesia.

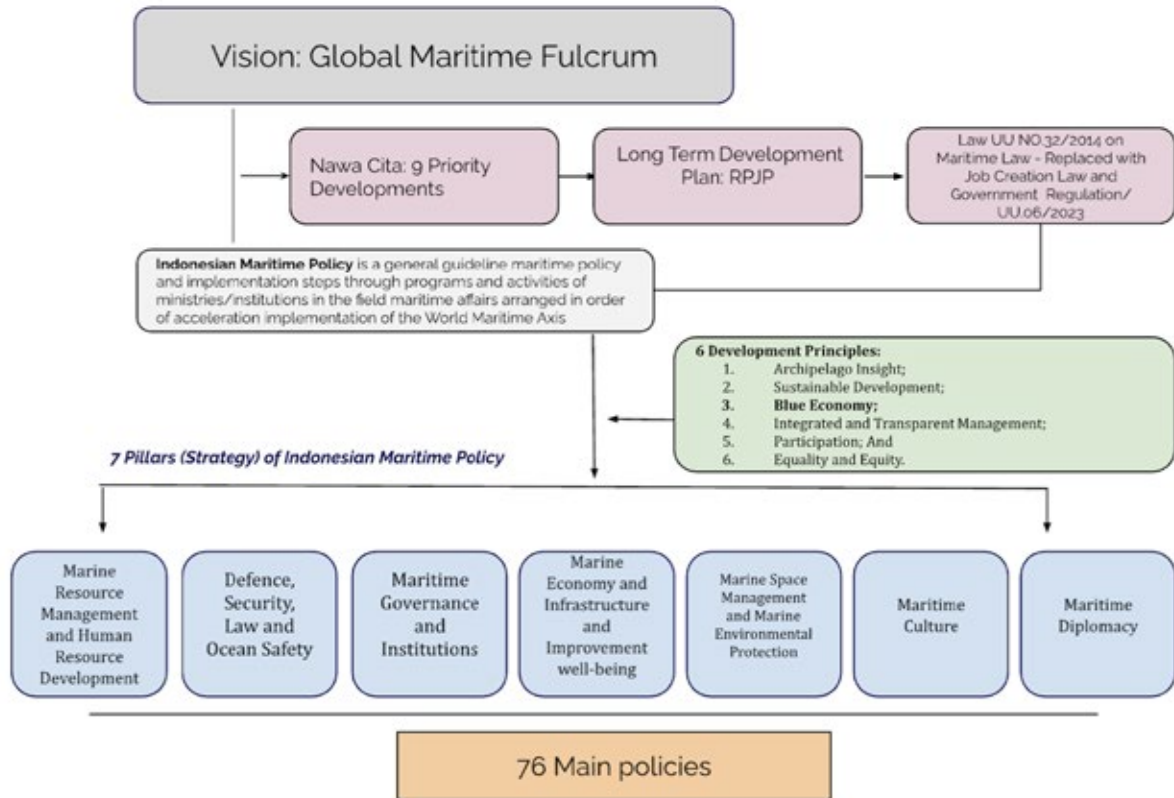


Figure 1: Architecture of Maritime Development in Indonesia (Authors developed from multiple sources, Kemenkomarves, 2017; Government Regulation 34/2022)



Earlier in this paper, we discussed the history of the GMF's inception under Jokowi's administration. During his presidential campaign, Jokowi introduced Nawacita, which outlined nine main programs aimed at achieving Indonesia's economic transformation (refer to Figure 1).¹³⁰ Jokowi's determination to position Indonesia as a global centre and benchmark for the marine economy is reflected in the RPJMN and RPJPN. To translate this vision into concrete actions, the government issued several laws and regulations. Law No. 32/2014 concerning Marine Affairs serves as the cornerstone of marine policy in Indonesia. This was further strengthened by Law No. 2/2022 concerning Job Creation and Presidential Regulation No. 34/2022. In the regulatory hierarchy, Law holds a higher position than Presidential Regulation, as it requires a legislative process in parliament, whereas Presidential Regulations are processed more quickly. Consequently, Presidential Regulations are often more adaptive than Laws.

Presidential Regulation No. 34/2022 on the Indonesia Marine Policy Action Plan for 2021–2025 outlines seven strategic pillars in maritime policy. These include Marine Resources Management and Development, Human Resources, Defense, Security, Law Enforcement, and Safety at Sea, Maritime Governance and Institutions, Maritime Economy and Infrastructure, Improvement of Well-being, Marine Space Management and Marine Environmental Protection, Maritime Culture, and Maritime Diplomacy (refer Figure 1).¹³¹ Furthermore, the implementation of these seven pillars requires adherence to six development principles, including Archipelago Insight, Sustainable Development, Blue Economy, Integrated and Transparent Management, Participation, and Equality and Equity (see Figure 1¹³²). These seven pillars encompass 76 main policies across various sectors, necessitating strong collaboration. Indonesia's maritime development demonstrates the state's central role in designing and orchestrating policy (see Presidential Regulation 80/2021).¹³³ The Ministry of Development Planning designs the guidelines and plans that should be adopted by other related ministries. These ministries are responsible for creating programs that support the GMF vision as outlined in the RPJMN and RPJP. From a regulatory perspective, the Blue Economy is not merely a program but an ethical principle that related ministries should adopt.



However, Indonesia's Blue Economy Framework and Roadmap, designed by Bappenas, seeks to go beyond principles, aiming to establish concepts, strategies, and action plans. This approach presents potential challenges in policy design, as the Roadmap itself overlooks some key components mandated by Law No. 32/2014 and Presidential Regulation No. 34/2022. First, the framework and roadmap are heavily centered on economic ideas, focusing on utilizing marine-based resources for sustainable economic growth. The roadmap extensively discusses economic contributions, such as job creation, industrial development, and strategic positioning in global shipping routes (Indonesia Archipelagic Sea Lanes).¹³⁴ However, Law No. 32/2014 clearly mandates the sustainable use of marine resources while ensuring that activities do not harm environmental health.¹³⁵ This mandate is further strengthened by the Presidential Regulation, which links maritime development with sustainability goals. Despite this, the roadmap lacks a specific integration of sustainability and conservation into each sector. Therefore, the roadmap needs to integrate a sustainability framework that covers marine protected areas, pollution and waste control from land to the ocean, and mitigation of the impacts of maritime activities.

Second, Law No. 32/2014 emphasizes robust maritime security, including the establishment of the Maritime Security Agency of the Republic of Indonesia (Bakamla). Presidential Regulation No. 34/2022 also prioritizes maritime security as part of the action plans to protect resources and sovereignty.¹³⁶ However, the Blue Economy Roadmap largely omits maritime security considerations. Although governance and law enforcement are briefly mentioned, the roadmap

does not specifically address security challenges such as illegal fishing, piracy, human trafficking, territorial disputes, and security challenges in shipping routes. There are also policy gaps that need to be addressed, including the lack of a comprehensive maritime security strategy and law enforcement. Despite the fact that Indonesia faces threats from IUU Fishing¹³⁷, there is no clear allocation of tasks, duties, and responsibilities, potentially leading to a lack of coherence, synergy, and overlapping programs between government agencies at both national and regional levels. Therefore, it is recommended that the Roadmap be revisited to sufficiently address maritime security strategy and incorporate Bakamla and other related government agencies. Furthermore, the Roadmap lacks a clear connection between economic activities and national defense strategies as mandated by law. This issue should be addressed by ensuring that national defense policies support activities aimed at achieving the state's goals.

Third, the roadmap overlooks environmental degradation as a security issue but does not address how the country can adapt to and build resilience against climate change.¹³⁸ The Blue Economy Roadmap lacks comprehensive policies to enhance Indonesia's adaptability, resilience, and preparedness for uncertainties arising from climate change, such as rising sea levels, the survival of micro-islands, and fishery depletion. Therefore, detailed policy designs to manage these threats and uncertainties need to be formulated. Additionally, the roadmap should elaborate and incorporate specific environmental protection policies, such as reducing marine pollution, conserving biodiversity, and tackling plastic waste. Fourth, the Roadmap fails to link the Blue Economy with the Economic-Security nexus. The roadmap does not elaborate on potential internal and external threats that may arise, such as the security of offshore energy infrastructure, undersea cables, and piracy or illegal activities in shipping routes. A holistic approach is needed to integrate all aspects. Moreover, Law No. 32/2014 and Presidential Regulation No. 34/2022 emphasize marine spatial planning, but the Roadmap lacks a detailed approach to achieving this. Therefore, there should be a development of a marine planning framework that prioritizes areas based on different activities while ensuring a balance between environmental and social needs.

Fifth, the roadmap heavily focuses on the marine sector, with limited coverage of coastal agriculture and inland waters. The roadmap fails to consider the roles and interests of all stakeholders in the Blue Economy. If the policy relies too heavily on the marine sector while neglecting the interests of coastal communities, inefficiencies in policy implementation are likely. Fifth, Law No. 32/2014 and Presidential Regulation No. 34/2022 clearly emphasize the importance of coordination between ministries and government agencies to implement

maritime policy. However, the Blue Economy Roadmap does not elaborate in detail the roles and responsibilities of each institution. This omission could lead to overlapping roles among ministries and government agencies, ultimately impacting the agenda. There are 26 ministries involved in the Blue Economy Roadmap and 18 in marine development.¹³⁹ Each government institution creates its own program aligned with ministerial objectives. This decentralization of programs into government ministries makes it challenging to measure policy outcomes. For instance, if the Ministry of Fisheries has different policies and objectives within the Blue Economy compared to other government bodies, this could affect the efficiency of policy budgeting. Moreover, there is no clear objective on synchronizing institutions, stakeholders, and policies to support maritime goals. For example, the roadmap lacks an elaboration on the importance of maritime security and the roles of the Ministry of Defense, Water Police, and The Maritime Security Agency in supporting the Marine and Blue Economy. This is problematic because it is nearly impossible to achieve economic objectives without ensuring the security of the ocean. This suggests that the Blue Economy Roadmap seems to neglect political, security, and geopolitical aspects in its design. Particularly, threats persist not only in the ocean but also on land (such as polluted rivers and plastics) and from foreign sources (illegal fishing, plastic waste, oil dumping, etc.). Therefore, the government should consider designing an integrated maritime policy that encompasses not only ocean-based activities but also coastal areas.

Finally, separating the Blue Economy from the six development principles stated in Presidential Regulation No. 34/2022 will require the remaining five principles to have their concepts, strategies, and action plans designed separately.¹⁴⁰ This could lead to confusion, as too many policy guidelines would be based solely on ethical principles. Meanwhile, the other seven pillars of strategy have not yet been elaborated in terms of concepts, designs, and action plans. Therefore, there is no clear understanding of the policy strategy for other pillars. Thus, it is important to clearly define, from a regulatory perspective, the scope and definition of the Blue Economy and align it with policy design. If we refer back to the Blue Economy as a development principle, then its functions and essence need to be clearly elaborated to avoid misinterpretation in policy design. One important aspect to address is that GMF is the umbrella for Indonesia's Maritime Policy. Therefore, its scope cannot be limited to marine issues alone but must comprehensively and inclusively collaborate with other related sectors, including coastal areas and inland waters. Incorporating these aspects into the Blue Economy Roadmap will help make Indonesia's vision of the GMF achievable.



CONCLUSION

As Indonesia positions itself as a Global Maritime Fulcrum, the alignment between its maritime vision and the Blue Economy framework remains crucial to achieving sustainable development and economic growth. This paper has identified several critical gaps in the coherence of Indonesia's policies, notably in the inconsistent use of maritime and marine terminology, the overemphasis on economic growth at the expense of sustainability, and the lack of an integrated maritime security strategy. The findings reveal that while Indonesia's Blue Economy Framework rightly seeks to balance economic and environmental objectives, it remains overly focused on economic contributions from the marine sector, sidelining key elements such as maritime security and stakeholder inclusivity.

The exclusion of coastal agriculture and insufficient attention to the livelihoods of coastal communities highlight the incomplete scope of the Blue Economy roadmap. Without addressing these omissions, Indonesia risks marginalizing vital stakeholders and failing to create a truly inclusive and sustainable maritime strategy. The absence of a comprehensive maritime security strategy in the Blue Economy framework is also an oversight. Maritime security is integral to safeguarding Indonesia's resources and sovereignty from threats like illegal fishing, piracy, and environmental degradation. By neglecting security considerations, the current policy framework leaves economic gains vulnerable to external disruptions, which could undermine both short- and long-term development goals.

To truly realize the vision of the Global Maritime Fulcrum, Indonesia must adopt a holistic and integrated approach that balances economic, environmental, and security concerns. This includes defining clear roles and responsibilities for the 26 ministries and 18 government agencies involved in marine and maritime development to prevent policy fragmentation and inefficiencies. Stakeholders at all levels, especially coastal communities, must be actively involved in the design and implementation of policies that directly affect their livelihoods. Moreover, the government must prioritize building stronger connections between marine-based economic activities and national security strategies.

By incorporating a security framework within the Blue Economy, Indonesia can enhance its resilience to both internal and external threats, ensuring the long-term viability of its maritime ambitions. Indonesia's potential to become a global maritime leader hinges on its ability to address these gaps and establish a balanced, sustainable, and secure maritime policy framework. With a more comprehensive and inclusive approach, Indonesia can harness its vast maritime resources for both economic growth and regional stability, ensuring that the Global Maritime Fulcrum vision is not only ambitious but achievable.

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