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The Global Maritime Fulcrum Policy in Promoting Economic Growth

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ABSTRACT

Objective: *This study examines the role of the Global Maritime Fulcrum (GMF) policy in promoting Indonesia's economic growth and identifies the challenges and opportunities surrounding its implementation.* ***Method:*** *The study takes a qualitative approach, using a literature review strengthened by a systematic search protocol covering core publications from 2010–2024 drawn from Google Scholar, Garuda, Scopus, and DOAJ, supplemented with official policy documents.* ***Results:*** *The GMF shows signs of contributing positively to the economy: national logistics costs stood at 14.29 percent of GDP in 2022, down sharply from earlier estimates of around 24 percent, and the maritime sector's contribution to GDP is targeted to reach 9.1 percent by 2029. Infrastructure development has strengthened inter-island connectivity, better maritime security has improved the investment climate, and maritime diplomacy has opened new market access. Implementation still faces limited infrastructure, marine environmental degradation, weakening policy momentum during the second administration period, and price disparities that persist owing to low return-cargo volumes.* ***Novelty:*** *The study weighs official policy narratives against critical scholarship and recent policy data within a policy implementation framework, offering a more balanced assessment of the GMF as an instrument of economic growth.*

INTRODUCTION

Indonesia, the world's largest archipelagic state, comprises more than 17,000 islands and a coastline of roughly 99,093 kilometers as measured by the Geospatial Information Agency, giving it extraordinary maritime potential. That potential spans natural resource wealth, strategic trade routes, and a geopolitical position of real weight in the Indo-Pacific [1], [2]. This maritime character has also been affirmed in law: Law No. 32 of 2014 on Marine Affairs establishes Indonesia's standing as an archipelagic state of nusantara character [3], with consequences that extend to archipelago-based administrative arrangements [4]. In practice, however, much of this potential remains underused. Against that backdrop, the government launched the Global Maritime Fulcrum (GMF) policy, declared by President Joko Widodo in 2014. The doctrine sets out a comprehensive strategy for realizing Indonesia's aspiration to become a sovereign, advanced, and self-reliant maritime nation that plays an active part in maintaining regional stability and peace [5], [6].

The policy rests on five interlocking pillars. The first is rebuilding Indonesia's maritime culture, rooted in the nation's history and identity as a seafaring people. The second is managing marine resources sustainably, covering responsible fisheries, conservation of marine ecosystems, and exploration of ocean energy resources. The third is developing maritime infrastructure and connectivity — ports, the sea toll program, and supporting facilities — to drive trade and inter-island mobility. The fourth is proactive maritime diplomacy: expanding cooperation with other states to keep the region secure and stable while advancing Indonesia's interests in international forums. The fifth is building a credible maritime defense force to safeguard territorial sovereignty and protect national interests at sea [7].

In economic terms, the GMF is expected to work as a catalyst for inclusive and sustainable growth. The maritime sector is projected to become a new engine of the national economy and a broad source of employment [8]. Priority sectors include fisheries, marine tourism, ocean energy, and maritime logistics. The policy also marks a shift in the orientation of Indonesia's ocean policy, from an approach centered on security deterrence toward a strategy that treats the sea as a foundation for national economic growth [9].

Assessments of the GMF in the literature are far from uniform, however. Several critical studies argue that the policy lost momentum in President Joko Widodo's second term, as national priorities shifted toward land infrastructure and investment, leaving the GMF to function more as a foreign policy narrative than an institutionalized grand strategy [10], [6]. Other work stresses that Indonesia has yet to build an integrated maritime economy, held back by limited maritime technology and the weak integration of ocean and fisheries sectors into national development planning [11]. The tension between the narrative of achievement and these critical findings is the research gap this study addresses — all the more pressing given the place of maritime policy on the road to Golden Indonesia 2045 [12].

Indonesia's path toward becoming a global maritime fulcrum is not free of obstacles. Limited infrastructure, marine environmental degradation, illegal fishing, and non-traditional security threats such as piracy and terrorism all stand in the way [13]. This study therefore analyzes the role of the GMF in promoting Indonesia's economic growth and identifies the challenges and opportunities it faces. The analysis is intended to yield policy recommendations for making the most of the GMF going forward.

RESEARCH METHOD

This is a qualitative study using a literature review approach. The approach suits the study's focus on analyzing documents and scholarly work concerning the Global Maritime Fulcrum and Indonesia's economic growth, and it allows an in-depth reading of the perspectives, arguments, and findings of earlier research on the subject. To improve transparency and replicability, the study adopts systematic literature review (SLR) principles in a limited form: an explicit search protocol, stated inclusion and exclusion criteria, and a documented selection process.

All data in this study are secondary, consistent with a literature review design that involves no field data collection. The primary sources are peer-reviewed journal articles, national and international, addressing the GMF and its links to Indonesia's economic growth, published between 2010 and 2024. Supporting sources comprise official policy documents — including marine affairs legislation and national development planning documents — used for triangulation and to round out the analysis.

The literature search covered Google Scholar, Garuda (Garba Rujukan Digital), Scopus, and the Directory of Open Access Journals (DOAJ), using the keywords "poros maritim dunia", "global maritime fulcrum", "ekonomi maritim Indonesia", "tol laut", and "maritime security Indonesia". Inclusion criteria were: (1) peer-reviewed journal articles or policy documents issued by official institutions; (2) publication between 2010 and 2024; and (3) relevance to the relationship between the GMF and the economy. Excluded were non-scholarly media commentary, duplicates, and publications whose sources could not be verified. The selection process yielded 29 core scholarly works as the basis of analysis, supported by four official policy documents for triangulation.

The collected material was analyzed in three stages: data reduction, by selecting, focusing, and organizing information relevant to the research questions; data display, presented systematically as descriptive narrative; and conclusion drawing and verification, connecting the findings to theory and prior research and triangulating across sources to keep the findings sound.

The analytical framework centers on how the GMF is implemented through its five pillars and how each pillar contributes to Indonesia's economic growth. It covers the identification of programs and activities, an assessment of their effects on economic indicators, and an analysis of the factors that help or hinder implementation. As its theoretical lens, the study draws on the public policy implementation literature, which holds that implementation succeeds or fails on inter-agency coordination, the availability of funding, political commitment, and the capacity of implementers [14], [15].

RESULTS AND DISCUSSION

Results

The Global Maritime Fulcrum, declared by President Joko Widodo in 2014, is a doctrine aimed at restoring Indonesia's identity as an advanced, sovereign, self-reliant maritime nation with global standing [5]. The policy rests on five pillars: rebuilding Indonesia's maritime culture as an integral part of national identity [16]; managing marine resources sustainably to support growth while preserving the environment [11]; developing maritime infrastructure and connectivity to bring transport costs down [13]; conducting proactive maritime diplomacy to keep the region stable and expand trade and investment [7]; and building maritime defense capability to protect sovereignty and secure economic activity at sea [17]. Work from a national security perspective adds that the vision stands on firm foundations — legal, historical (the maritime legacy of Srivijaya and Majapahit and the Djuanda Declaration), and socio-economic — and that the transformation of the land, sea, and air defense system plays a real part in bringing it about [18].

Maritime infrastructure development has been one of the main lines of implementation. Port construction and the sea toll program have helped connect the islands, lower logistics costs, and lift economic activity across the regions [8]. Better connectivity eases the flow of goods and services, stimulates inter-island trade, and opens new markets for local products.

The numbers bear this out in national logistics costs. Indonesia's logistics costs were long flagged at around 24 percent of GDP, the highest among neighboring countries and a major drag on the competitiveness of the national logistics system [19]. A joint official calculation by Statistics Indonesia, the Ministry of National Development Planning/Bappenas, and the Coordinating Ministry for Economic Affairs subsequently put national logistics costs at 14.29 percent of GDP in 2022, and the 2025–2029 National Medium-Term Development Plan (RPJMN) sets further reduction targets of 13.52 percent by 2025 and 12.5 percent by 2029 [20]. At the operational level, a study of multiport route optimization for the sea toll in Maluku and southern Papua shows that route redesign can cut unit shipping costs to the east [21]. Even so, the sea toll has not fully closed the price gap between regions, largely because return cargoes from eastern Indonesia remain thin, which makes the logistics loop inefficient and leaves the program's benefits unevenly spread across remote, outermost, and border areas [19], [21].

Strengthening maritime security has been another priority. Action against illegal fishing, smuggling, and piracy has improved order at sea, supporting economic activity and drawing investment into the marine sector [22]. The international literature adds that Indonesia's maritime security needs a comprehensive agenda — one that goes beyond enforcement to include institutional governance across the country's several maritime authorities [23]. Active maritime diplomacy has contributed as well: Indonesia has expanded bilateral and multilateral maritime cooperation, which supports trade, investment, technology transfer, and human capital development [24]. The legal footing of national ocean policy has also been reinforced through Presidential Regulation No. 16 of 2017 on Indonesian Ocean Policy, which serves as the cross-ministerial reference for marine sector development [25], [26].

At the macro level, the 2025–2029 RPJMN makes the maritime sector's GDP contribution one of the main national development targets, to be raised to 9.1 percent by 2029 [20]. The target says two things at once: the state now treats the maritime economy as a source of new growth, and its current contribution still runs well below the potential of Indonesia's ocean economy.

The literature also points to problems at the level of the policy itself. Critical studies find that the GMF lost momentum in the second administration period, as the maritime narrative slipped from the list of national priorities and the policy never hardened into a lasting grand strategy [10], [6]. In the same vein, work from a policy design perspective calls for a stronger design of the maritime fulcrum policy — more measurable, better coordinated, and more results-oriented [27].

Discussion

The findings indicate that the Global Maritime Fulcrum has contributed positively to Indonesia's economic growth, through lower logistics costs, the elevation of the maritime economy to a headline national development target, and a better investment climate. As a literature review, however, this study cannot establish the size of any causal relationship between the GMF and these indicators, so the findings should be read as associations supported by the convergence of multiple sources.

On the infrastructure pillar, Prihartono [28] found that the sea toll program benefited the economy of eastern Indonesia by narrowing price disparities and improving access to goods and services. Recent policy data point the same way, with national logistics costs down to 14.29 percent of GDP [20], although the narrowing of price gaps varies across regions because of the return-cargo problem and the slow growth of industry in sea toll destination areas [19], [21]. Infrastructure development also continues to run up against funding constraints and weak inter-agency coordination, which calls for innovative financing such as public-private partnerships and for an integrated land logistics system so that goods move efficiently from port to final market. Beyond logistics, the non-logistics maritime economy holds considerable promise as well; empirical work shows marine tourism delivering real economic gains for island regions [29].

On the security pillar, better maritime security correlates with higher investment in the marine sector, since lower risk strengthens investor confidence [17]. Maritime security is also inseparable from national defense: building a maritime fulcrum requires stronger naval defense capability as a precondition of national security [30]. Non-traditional threats — piracy, drug smuggling, terrorism — nonetheless remain live risks. Indonesia needs stronger capabilities in the Navy, the Marine and Air Police, and Bakamla, deeper international cooperation, and better technology-based surveillance, including drones and satellites, to monitor illegal activity across its vast waters [22], [23]. Given the limits of its defense equipment in both quantity and quality, Indonesia has stepped up maritime defense diplomacy, bilateral and multilateral, as a rational way to offset the capability gap in responding to non-traditional threats; regional cooperation of this kind is credited with the downward trend in piracy cases in Indonesian waters reported by ReCAAP [31].

Developments in the global maritime security literature raise a further agenda that matters for where the GMF goes next: the protection of critical maritime infrastructure. Infrastructure at sea spans five domains — transport, energy, data in the form of subsea fiber-optic cables, fishing, and ecosystems — facing threats that run from accidents and terrorism to blue crime and grey zone tactics [32]. For Indonesia, whose economy leans ever more heavily on shipping connectivity, energy terminals, and subsea data cables, this protective dimension has no explicit home in the five pillars of the GMF. Bringing defense, diplomacy, marine safety, maritime security, and cyber security together in a single framework for protecting critical maritime infrastructure is becoming an urgent policy need [32].

On the diplomacy pillar, bilateral and multilateral cooperation has lifted trade, investment, and technology transfer [24]. Yet the success of maritime diplomacy depends on regional geopolitical stability; tensions in the South China Sea can disrupt trade routes and security across the Indo-Pacific, so Indonesia has to keep playing a central role as mediator and initiator of regional cooperation.

At the wider geopolitical level, the GMF also works as Indonesia's middle power strategy for responding to the two large initiatives contending in the Indo-Pacific: China's Belt and Road Initiative (BRI) and the Quad's Free and Open Indo-Pacific (FOIP) [33]. Through the GMF, Indonesia draws on both initiatives selectively for its own maritime development — including infrastructure financing from both directions — without being pulled into either camp. The position buys valuable diplomatic room to maneuver, but it also demands a clearly designed policy, lest the GMF shrink into a merely reactive instrument of external dynamics [33].

Read through the policy implementation framework [14], [15], these obstacles reflect four classic causes of implementation failure: weak coordination among implementing agencies, funding constraints, political commitment that fluctuates across administrations, and capability gaps among implementers in the regions. The loss of GMF momentum in the second administration period [10], [6] is the clearest expression of that fluctuating commitment, and it underlines that institutional continuity — not merely the launch of a policy — is what long-run economic impact requires.

Seven policy implications follow from these findings: (1) accelerate investment in maritime infrastructure and connectivity in eastern Indonesia, with particular attention to building up return cargoes and industry in sea toll destination areas [21]; (2) apply blue economy principles through science-based catch quotas per fisheries management area and wider marine conservation zones [11]; (3) strengthen Navy and Bakamla capabilities and invest in Maritime Domain Awareness technology [22], [30]; (4) step up maritime diplomacy to promote investment in ocean renewable energy and marine tourism [7], [29]; (5) develop a competitive maritime industry focused on building and maintaining vessels to cut import dependence; (6) revamp maritime vocational education and training to match the needs of maritime industry 4.0; and (7) institutionalize the GMF in medium- and long-term development planning documents so that policy continuity no longer hangs on the political dynamics of successive administrations [10], [27].

CONCLUSION

Fundamental Finding : The Global Maritime Fulcrum plays a strategic role in Indonesia's economic growth. Implementation across its five pillars shows signs of positive contribution to economic indicators — among them the fall in national logistics costs to 14.29 percent of GDP (2022) from around 24 percent, and the 2025–2029 RPJMN target of a 9.1 percent maritime contribution to GDP by 2029 — supported by stronger inter-island connectivity, a security climate conducive to investment, and international cooperation that opens new markets. **Implication :** Realizing this potential requires sustained effort from all stakeholders: faster infrastructure development in eastern Indonesia, blue economy-based marine resource management, technology-based maritime security, proactive maritime diplomacy, the development of maritime industry and human capital, and the institutionalization of the policy so that it no longer depends on the political dynamics of successive administrations. **Limitation :** As a literature review, this study does not test causal relationships statistically; its claims are associative, resting on the convergence of multiple sources, with some risk of publication bias and differences in how institutions calculate the underlying data. **Future Research :** Further research should take a quantitative approach — path analysis or provincial panel regression, for instance — to test empirically how maritime infrastructure spending affects regional economic growth indicators.

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