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One Region, Different Speeds: A Comparative Policy Review of Blue Economy Frameworks in Indonesia, the Philippines, and ASEAN

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ABSTRACT

The blue economy has become the dominant regional framing for reconciling ocean-based economic growth with marine sustainability across Southeast Asia, yet ASEAN member states have adopted this framing at markedly different institutional speeds, and no comparative account has yet examined what these differences mean for how individual maritime higher-education institutions should translate blue economy policy into curriculum and community engagement. This study conducts a comparative desk-based policy review of blue economy frameworks at the regional (ASEAN), and two national (Indonesia, Philippines) levels, applying a four-dimension comparative matrix covering governance structure, legal-institutional formalisation, education-policy linkage, and community-empowerment provision. Document analysis of the ASEAN Blue Economy Framework, its associated 2026–2030 Implementation Plan, Indonesia's blue economy policy landscape, and the Philippines' 2024 Blue Economy Act indicates that the Philippines has achieved the region's most advanced legal-institutional formalisation through statute and a dedicated coordinating council, while Indonesia possesses the region's largest blue economy value base but a comparatively less formalised national legal instrument, and ASEAN's own regional framework functions as a coordinating rather than binding mechanism across both. All three levels share a common and largely unaddressed weakness: none specifies a direct, operational linkage between blue economy policy and maritime higher-education curriculum design. The review offers Indonesian maritime institutions a specific, comparatively informed basis for advocating clearer national education-policy linkage mechanisms.

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1. INTRODUCTION

A regional bloc adopting a shared economic framework does not thereby guarantee that its member states adopt it at the same pace, in the same institutional form, or with the same downstream consequences for the sectors and institutions the framework is meant to transform, and the blue economy's recent rise as ASEAN's preferred framing for ocean-based sustainable development illustrates this unevenness with unusual clarity. Since ASEAN leaders' 2021 declaration on the blue economy and the subsequent adoption of the ASEAN Blue Economy Framework at the 2023 Jakarta Summit [1], member states have moved toward formal blue economy policy at markedly different speeds: a regional assessment covering the period through early 2023 finds that only a minority of

ASEAN member states had progressed beyond a general stated "intention" to develop a national blue economy strategy toward an actual published strategy or policy document, with the blue economy's measured contribution to national GDP ranging from as little as one percent to as much as thirty percent across the bloc [2]. This unevenness is not merely an administrative curiosity; it directly determines whether a given member state's maritime higher-education institutions have any national blue economy policy architecture to align their curricula and community engagement against, or whether they are, in effect, operating ahead of their own national policy framework.

Indonesia and the Philippines occupy strikingly different positions within this uneven regional landscape, despite sharing comparable archipelagic geography and comparable stakes in the blue economy's success. Indonesia possesses, by recent regional assessment, the largest blue economy value base in the ASEAN region, valued at over 1,334 billion USD and underpinned by more than seventeen thousand islands, a three-million-square-kilometre exclusive economic zone, and over five million fishers and fish farmers [2], yet its blue economy policy landscape remains distributed across multiple sectoral ministries and strategic documents rather than consolidated into a single overarching statute. The Philippines, despite a smaller absolute blue economy base, achieved a specific legal-institutional milestone in 2024 by enacting a dedicated Blue Economy Act, establishing a Blue Economy Council as a central coordinating body and integrating marine and coastal management, environmental-economic accounting, climate adaptation, and circular-economy principles into a single legislative framework [3]. This contrast — the region's largest blue economy value base without a single consolidating national statute, alongside a comparatively smaller blue economy formalised through dedicated national legislation — is precisely the kind of divergence a comparative policy review is designed to surface and interpret, because neither country's position is self-evidently "ahead" or "behind" the other without specifying which policy dimension the comparison addresses.

This divergence carries direct relevance for Indonesian maritime higher-education institutions specifically. Indonesian survey research on cadet, lecturer, and industry-practitioner blue economy awareness finds a moderate overall awareness level, with specific documented deficits in marine resource governance knowledge and applied community-empowerment orientation, and with management and industry-facing respondents demonstrating markedly higher awareness than other stakeholder groups [4]. This finding establishes that a blue economy awareness gap exists at the institutional level within Indonesia, but it does not establish, because it was not designed to, whether that gap reflects an institutional curriculum failure or a downstream consequence of Indonesia's own comparatively less consolidated national blue economy policy architecture relative to regional peers such as the Philippines. Distinguishing between these two explanations requires exactly the kind of cross-country comparative policy analysis that Indonesian blue-economy-awareness research, situated as it necessarily is within a single national context, cannot itself provide.

The broader academic and multilateral literature on blue economy policy provides conceptual grounding for such a comparison but has not yet applied it specifically to the Indonesia-Philippines-ASEAN triad with maritime education as the comparison's specific point of reference. The foundational multilateral framing of the blue economy as an integrated approach to sustainable marine resource use [5] establishes the concept's core content, while ASEAN's own regional framework explicitly positions education and research-centre coordination as one of its supporting pillars [1], [6] without specifying how individual member states' education systems should operationalise that pillar nationally. Regional assessments of blue economy development across ASEAN member states document considerable variation in national-level formalisation [2], [7], [8] but were not designed with an education-sector lens, and Indonesian blue economy education research [4] was not designed with a comparative regional lens. No existing source combines both.

This study therefore conducts a comparative desk-based policy review addressing three objectives: first, to characterise the blue economy policy frameworks currently in place at the ASEAN regional level and within Indonesia and the Philippines specifically, using a common comparative matrix; second, to determine where these three frameworks converge and diverge on governance structure, legal-institutional formalisation, and community-empowerment provision; and third, to assess whether any of the three frameworks specifies a direct linkage mechanism between blue economy policy and maritime higher-education curriculum design, given the documented awareness gap this linkage would need to address [4]. The study's contribution is threefold. Theoretically, it extends blue economy policy analysis [5], [1], [6], [2], [7], [8] into an explicit cross-level, cross-country comparison structured around a common matrix rather than parallel single-jurisdiction assessments. Empirically, it produces the first comparative account explaining Indonesia's blue economy awareness gap [4] against its own comparatively under-formalised national policy architecture relative to a regional peer. Practically, it gives Indonesian maritime higher-education institutions a specific, comparatively grounded case for advocating

a clearer national education-policy linkage mechanism, modelled on elements of the Philippines' more consolidated approach.

2. Literature or Theoretical Review

The blue economy concept, in its foundational multilateral articulation, denotes the sustainable use of ocean and marine resources for economic growth, improved livelihoods, and employment while preserving the health of the underlying marine ecosystem [5], a framing broad enough to encompass fisheries, tourism, shipping, renewable energy, and marine biotechnology simultaneously, and correspondingly broad enough that its translation into specific national policy can take markedly different institutional forms without contradicting the concept's core definition. ASEAN's own regional adoption of this framing, formalised through the ASEAN Blue Economy Framework endorsed at the 2023 Jakarta Summit, defines the blue economy in explicitly cross-sectoral, cross-stakeholder terms and structures its framework around three coordinating strategies, including an explicit education- and research-centre coordination component intended to build blue economy knowledge and capacity across member states [1]. The subsequent 2026–2030 ASEAN Blue Economy Implementation Plan operationalises this framework around five cross-cutting "blue outcomes," intended to guide, rather than bind, member states' own national implementation choices [6] — a structural feature directly relevant to interpreting the cross-country variation this review documents, since a coordinating rather than binding regional framework by design permits, and to some extent invites, the kind of national-level divergence in formalisation speed and institutional form that this study takes as its central comparative object.

Regional assessment of that divergence confirms it is substantial rather than marginal. A comprehensive ERIA review of blue economy development across ASEAN member states, current to early 2023, classifies member states along a four-stage progression — no recorded commitment, stated intention, published strategy, or published policy with an associated action plan — finding that only a minority of member states had reached the furthest, policy-with-action-plan stage at that time, alongside blue economy GDP contributions ranging from roughly one to thirty percent across the bloc depending on national measurement approach and economic structure [2]. Country-specific ERIA policy analysis situates Indonesia within this landscape as possessing an unusually large absolute blue economy resource base — over 1,334 billion USD in estimated value, anchored by more than seventeen thousand islands and a three-million-square-kilometre exclusive economic zone — while noting that Indonesia's blue economy policy engagement remains distributed across multiple sectoral programmes and international partnership commitments rather than consolidated into a single national blue economy statute [2], [7]. Complementary Philippines-focused ERIA analysis, published in the same period, catalogues the Philippines' blue economy development trajectory as comparatively more institutionally consolidated even before its 2024 legislative milestone, reflecting an established pattern of dedicated national ocean-governance planning [8].

That 2024 legislative milestone — the Philippines' Blue Economy Act, establishing a dedicated Blue Economy Council as the central coordinating body for an integrated national strategy encompassing marine and coastal management, environmental-economic accounting, climate adaptation and mitigation, and circular-economy principles [3] — represents, within the ASEAN comparative landscape this literature documents, one of the region's most consolidated single-instrument national blue economy frameworks to date. Reading this legislative achievement against the ERIA regional assessment's four-stage progression scale [2] positions the Philippines toward the most advanced end of that scale specifically on the dimension of legal-institutional formalisation, a positioning this review treats as an empirical comparative finding rather than a normative judgement about overall national blue economy performance, since formalisation is only one of several dimensions on which national blue economy engagement can be assessed.

Within Indonesia specifically, the education-sector consequence of this comparatively less consolidated national policy architecture has begun to be documented empirically. Survey-based research on blue economy awareness among Indonesian maritime cadets, lecturers, veteran officers, and industry practitioners finds a moderate overall awareness level, with specific and consistent deficits in marine resource governance knowledge and applied community-empowerment orientation, and with management and industry-facing respondents demonstrating markedly higher awareness than cadets or educators [4]. This finding is theoretically consistent with, though not directly derived from, the regional policy-formalisation literature reviewed above: an institution operating within a national policy landscape that has not yet consolidated blue economy governance into a single, clearly communicated statute or coordinating body has correspondingly less clear national-level material to draw upon when designing blue-economy-relevant curriculum content, relative to an equivalent institution operating within a jurisdiction, such as the Philippines post-2024, where a single Act and Council now provide an explicit reference point.

No existing source connects these two literatures directly: the ASEAN and country-level policy-

formalisation literature [1], [6], [2], [7], [8], [3] does not examine maritime education outcomes, and the Indonesian maritime education literature [4] does not situate its awareness findings against comparative regional policy-formalisation evidence. The present review's comparative matrix, detailed in Section 3, is designed specifically to establish this connection, testing whether Indonesia's documented education-sector awareness gap [4] is plausibly attributable, at least in part, to its comparatively less consolidated national policy architecture relative to the Philippines' more formalised approach, and whether ASEAN's own regional framework provides any mechanism capable of closing this gap independent of national-level formalisation.

3. METHOD

This study conducts a comparative, desk-based policy document analysis of blue economy frameworks at three levels — ASEAN regional, Indonesian national, and Philippine national — selected because they represent, respectively, the coordinating regional framework within which both national cases operate, the ASEAN member state with the region's largest blue economy resource base and the specific national context motivating this review, and the ASEAN member state that has, per the comparative literature reviewed in Section 2, achieved the region's most consolidated single-instrument legal-institutional formalisation to date. This purposive, contrast-maximising selection — comparing the largest resource base against the most formalised legal instrument, both situated within a shared, non-binding regional coordinating framework — was chosen specifically to make any resulting policy-linkage or formalisation gap maximally visible, consistent with comparative case-selection logic that prioritises analytically informative contrast over representativeness across the full ASEAN membership.

The primary documents analysed comprised the ASEAN Blue Economy Framework and its associated 2026–2030 Implementation Plan [1], [6]; the ERIA regional and country-specific policy assessments covering Indonesia and the Philippines [2], [7], [8]; and the Philippines' 2024 Blue Economy Act [3]. These were supplemented by Indonesian maritime-education survey findings on blue economy awareness [4], included not as a policy document but as the specific education-sector outcome evidence this review's comparative analysis is designed to help explain.

The primary instrument for this review was a four-dimension comparative matrix, applied consistently across all three policy levels, coding each level's documented position on governance structure (the specific coordinating body or mechanism, if any, each framework establishes), legal-institutional formalisation (whether the framework exists as a binding statute, a published strategy or policy, or a stated intention only, following the ERIA four-stage progression scale [2]), education-policy linkage (whether the framework specifies any explicit mechanism connecting blue economy policy to educational-institution curriculum or capacity-building activity), and community-empowerment provision (whether the framework specifies mechanisms for coastal-community participation or benefit-sharing, as distinct from broad economic-growth framing alone).

Data collection consisted of close reading of each primary document to extract only explicitly stated provisions matching each of the four comparative-matrix dimensions, avoiding inference of provisions not directly stated in the source text. Data analysis combined structured cross-level comparison using the four-dimension matrix, following comparative-policy-analysis convention of holding the comparison dimensions constant across cases to enable direct contrast, with narrative synthesis connecting the resulting comparative profile to the Indonesian education-sector awareness evidence [4], following an interpretive logic consistent with established qualitative synthesis procedure [9]. The resulting comparative account is presented in Section 4.

4. RESULTS AND ANALYSIS

Table I presents the four-dimension comparative matrix produced through the document analysis described in Section 3, coding the ASEAN regional framework and the Indonesian and Philippine national frameworks against governance structure, legal-institutional formalisation, education-policy linkage, and community-empowerment provision.

Table I. Comparative Matrix of Blue Economy Frameworks — ASEAN, Indonesia, and the Philippines

Dimension	ASEAN Regional [1], [6]	Indonesia [2], [7]	Philippines [8], [3]
Governance Structure	Coordinating strategies under ASEAN Secretariat; non-binding on members	Distributed across sectoral ministries and international partnerships; no single national coordinating body identified	Dedicated Blue Economy Council established by statute as central coordinating body
Legal-Institutional Formalisation	Regional framework + implementation plan (2023; 2026–2030); not a binding instrument on member states	Strategy/intention-level engagement per ERIA four-stage scale; no single consolidating national statute identified	Enacted national statute (Blue Economy Act, 2024); most advanced formalisation stage in the comparison

Education-Policy Linkage	Names "research centres" and knowledge-building as a supporting pillar; no operational curriculum linkage specified	No explicit blue-economy-to-curriculum linkage mechanism identified in reviewed documents	No explicit blue-economy-to-curriculum linkage mechanism identified in reviewed documents
Community-Empowerment Provision	General "inclusive and sustainable" framing; sustainable/equitable tourism named as a strategic priority	Fisher and coastal-community stakeholder base explicitly recognised in resource-base framing	Explicit provisions for coastal livelihoods and inclusive economic growth within the Act

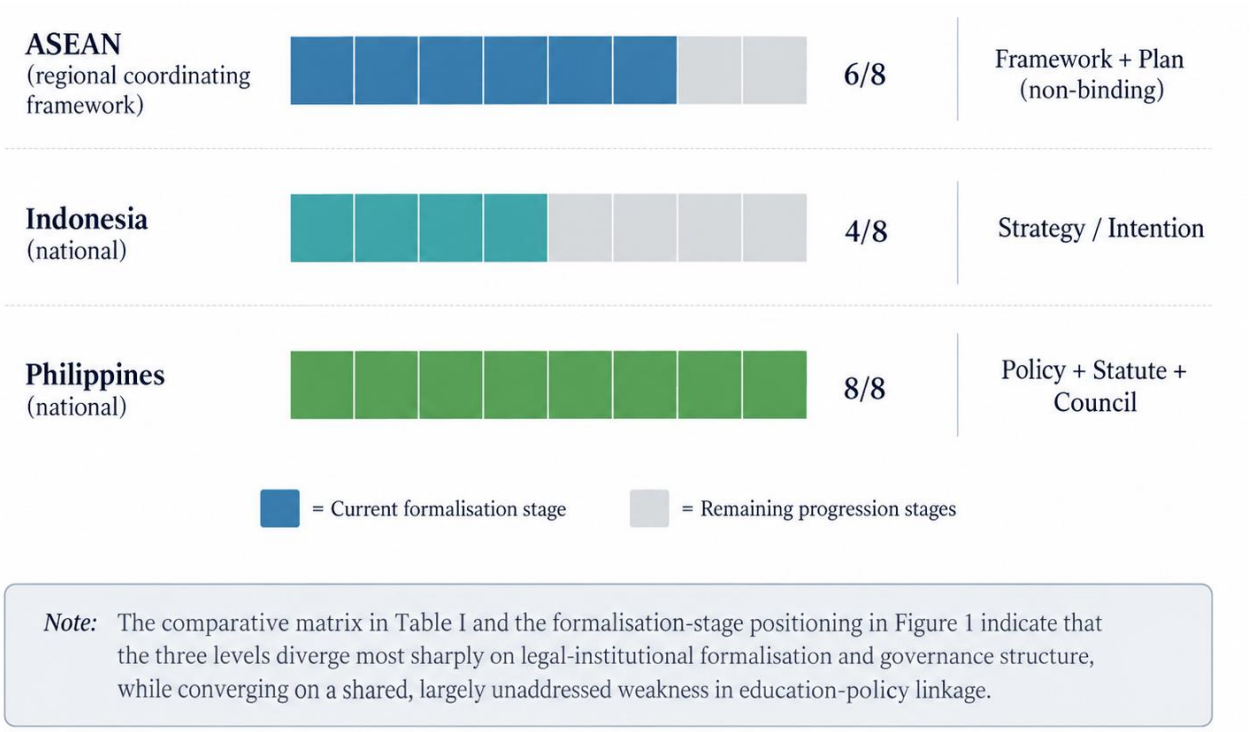


Figure 1. Formalisation Stage Comparison (ERIA four-stage progression scale, illustrative positioning)

The comparative matrix in Table I and the formalisation-stage positioning in Figure 1 together indicate that the three levels examined diverge most sharply on legal-institutional formalisation and governance structure, while converging on a shared, largely unaddressed weakness in education-policy linkage. The Philippines' 2024 Blue Economy Act represents the comparison's clearest instance of consolidated formalisation, establishing both a specific legal instrument and a dedicated coordinating council in a single legislative act [3], a combination neither the ASEAN regional framework nor Indonesia's own distributed sectoral approach currently matches. This is a genuine substantive difference rather than a difference of documentation quality: Indonesia's blue economy engagement is real and, by resource-base measures, the region's largest [2], but it is institutionally distributed rather than consolidated, meaning that an Indonesian maritime education institution seeking a single authoritative national reference point for blue economy curriculum design has, at present, no equivalent to the Philippines' Blue Economy Act and Council to draw upon.

The community-empowerment dimension shows a more graduated pattern than the binary formalisation contrast might suggest. All three levels examined include some form of community-oriented or livelihood-oriented provision, but with meaningfully different specificity: ASEAN's regional framing invokes "inclusive and sustainable" development in general terms [1], Indonesia's resource-base characterisation explicitly recognises its large fisher and coastal-community population as central to its blue economy profile without specifying a dedicated empowerment mechanism [2], while the Philippines' Act specifies coastal livelihoods and inclusive economic growth as explicit statutory objectives [3]. This graduated pattern is consistent with the formalisation-stage findings above, suggesting that legal-institutional consolidation and community-empowerment specificity move together rather than independently across the three cases examined.

The governance-structure dimension merits closer attention than a simple contrast between "distributed" and "consolidated" arrangements initially suggests, because the two patterns carry different practical consequences for accountability and implementation

speed rather than being merely stylistic differences in institutional design. Indonesia's distributed sectoral approach [2], [7] means that blue economy policy responsibility sits across multiple ministries and international partnership commitments simultaneously, which can in principle allow parallel progress across several sectors at once but also means that no single body is accountable if implementation stalls in any particular sector, and that a maritime education institution seeking guidance must identify which of several possible ministries or programmes is most relevant to its specific curriculum question. The Philippines' dedicated Blue Economy Council [3], by contrast, concentrates both accountability and, potentially, bottleneck risk in a single body: coordination is clearer in principle, but the entire national blue economy agenda's implementation pace now depends on that one Council's institutional capacity and political standing. ASEAN's own Secretariat-based regional coordination [1], [6] sits structurally closer to Indonesia's distributed model than to the Philippines' consolidated one, since the Secretariat coordinates rather than directs member states' own sectoral machinery, reinforcing this review's earlier observation that ASEAN's framework is designed to permit exactly this kind of national-level structural divergence rather than to standardise it.

A further pattern emerges when Indonesia's blue economy resource scale is read directly against its formalisation stage rather than considered separately. Indonesia's blue economy resource base — valued at over 1,334 billion USD and anchored by more than seventeen thousand islands and over five million fishers and fish farmers [2] — is, in absolute terms, substantially larger than the resource base underlying the Philippines' more consolidated statutory framework [8]. This juxtaposition suggests what might be termed a scale-formalisation mismatch: the ASEAN member state with the largest absolute stake in blue economy outcomes is not the member state with the most consolidated institutional mechanism for managing those outcomes, which, if the formalisation-implementation relationship the ERIA four-stage scale implies holds generally [7], would suggest that Indonesia carries comparatively higher institutional-coordination risk relative to the scale of what it stands to gain or lose than the Philippines does, independent of either country's substantive policy content or political commitment to the blue economy agenda. where all three levels converge on the same weakness: none of the reviewed documents, at any level, specifies an operational mechanism connecting blue economy policy to maritime higher-education curriculum design specifically. ASEAN's regional framework names research-centre coordination and knowledge-building as a general supporting pillar [1], but this falls well short of an operational linkage mechanism that a specific national curriculum authority or individual institution could act upon directly. Neither Indonesia's distributed sectoral approach nor the Philippines' more consolidated statutory approach fills this gap at the national level either, meaning that the Philippines' comparatively superior formalisation on the other three dimensions does not, on the evidence reviewed, translate into a comparatively superior education-policy linkage specifically. Read against the Indonesian moderate-awareness, uneven-stakeholder-group finding [4], this convergent gap suggests that Indonesia's documented blue economy awareness deficit is not simply a symptom of Indonesia's own comparatively less consolidated national formalisation relative to the Philippines, since even the Philippines' more advanced statutory framework does not specify the education-policy linkage mechanism that would be needed to close an equivalent awareness gap directly.

5. DISCUSSION

This review set out to characterise blue economy policy frameworks at the ASEAN, Indonesian, and Philippine levels using a common comparative matrix, and to determine whether any of the three specifies a direct education-policy linkage mechanism capable of addressing Indonesia's documented blue economy awareness gap. The findings answer the formalisation question clearly — the Philippines has achieved the comparison's most consolidated legal-institutional formalisation through its 2024 Blue Economy Act and Council [3], while Indonesia's considerably larger blue economy resource base remains institutionally distributed rather than consolidated [2], [7] — but answer the education-linkage question, perhaps more importantly, in the negative across all three levels examined: no reviewed framework, regardless of its formalisation stage, specifies an operational mechanism connecting blue economy policy to maritime higher-education curriculum design.

This finding complicates a plausible initial hypothesis this review's introduction implicitly raised: that Indonesia's documented blue economy awareness deficit [4] might be substantially explained by its comparative formalisation lag relative to a regional peer such as the Philippines. The comparative evidence does not support treating formalisation lag as the primary explanation, since the Philippines' more advanced formalisation does not correspondingly specify the education-linkage mechanism whose absence this review identifies as the more consequential, shared gap. This is a theoretically important refinement: it suggests that closing Indonesia's education-sector blue economy awareness gap is not simply a matter of Indonesia "catching up" to the Philippines' legal-institutional formalisation stage, since doing so alone would not, on the evidence reviewed here, automatically supply the

missing education-policy linkage either. Blue economy policy formalisation and blue economy education-policy linkage should accordingly be treated as two analytically distinct policy design problems, addressed by different institutional mechanisms, rather than as a single problem for which formalisation alone is a sufficient remedy.

The finding also sharpens how the ASEAN regional framework's education-related provision should be read. Naming research-centre coordination and knowledge-building as a supporting pillar [1], [6] signals regional-level awareness that education and capacity-building matter to blue economy implementation, but the absence of any specified operational mechanism within that provision means the pillar functions, at present, more as an aspirational placeholder than as an actionable policy instrument that a national curriculum authority or individual maritime institution could directly invoke. This is not necessarily a criticism of ASEAN's framework design specifically, since coordinating regional frameworks of this kind are, by their non-binding nature, generally reliant on member states to develop operational specificity nationally [6] — but it does mean that Indonesian maritime institutions cannot look to the regional framework to supply the linkage mechanism their own national policy landscape also currently lacks.

The review's principal limitation is its two-country comparative scope: examining only Indonesia and the Philippines, chosen for analytically productive contrast rather than for representativeness, means the finding that education-policy linkage is uniformly absent cannot be generalised with confidence to all eleven ASEAN member states without further comparative work, some of which — Vietnam's marine-economy GDP contribution trajectory and Cambodia's blue economy development priorities, for instance — appear in the broader regional literature but were not included in this review's four-dimension matrix. The clearest direction for future comparative work is accordingly an expanded matrix applied across a larger subset of ASEAN member states, to determine whether the education-policy-linkage gap identified here is a genuinely region-wide structural feature of blue economy policy design or an artefact of this review's specific two-country comparison.

For Indonesian maritime higher-education institutions specifically, the practical implication is that advocacy for improved blue economy curriculum integration should not wait for, or be framed as contingent upon, national blue economy policy formalisation reaching a Philippines-equivalent statutory stage, since the evidence here indicates that such formalisation would not, on its own, supply the missing linkage mechanism regardless. Institutions are better positioned advocating directly, at the institutional or ministry-of-education level, for a specific blue economy curriculum-integration mechanism, rather than treating broader national blue economy policy consolidation as a necessary precondition for that specific reform.

6. CONCLUSION

This comparative policy review examined blue economy frameworks at the ASEAN regional level and within Indonesia and the Philippines using a four-dimension matrix covering governance structure, legal-institutional formalisation, education-policy linkage, and community-empowerment provision. The Philippines has achieved the comparison's most advanced legal-institutional formalisation through its 2024 Blue Economy Act and Council, while Indonesia's larger blue economy resource base remains institutionally distributed; both, along with the ASEAN regional framework, share a common and unaddressed absence of any operational mechanism linking blue economy policy to maritime higher-education curriculum design. This shared gap indicates that Indonesia's documented blue economy education awareness deficit is not primarily attributable to national formalisation lag relative to regional peers, and that closing it will require a dedicated education-policy linkage mechanism rather than formalisation alone. The review offers Indonesian maritime institutions a comparatively grounded, specific basis for pursuing that linkage directly.

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