



MINISTRY OF FOREIGN AFFAIRS
REPUBLIC OF INDONESIA

THE **WORLD** TO COME

Strategic Foresight **2026-2027**

Reading the Risks, Building Resilience

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FOREWORD



Muhammad Takdir
Head of Foreign Policy Strategy Agency

The international situation in 2026 reflects the complex geopolitical tensions, economic uncertainty and fragmentation, technological transformation, and increasing environmental pressures. These dynamics are shaping a global landscape that is more volatile and difficult to anticipate. In such circumstances, strengthening our ability to discern emerging developments and potential disruptions is essential in formulating effective foreign policy.

Against this backdrop, the Foreign Policy Strategy Agency (FPSA) of the Ministry of Foreign Affairs of the Republic of Indonesia undertook the strategic foresight 2026 survey to understand global developments and their implications for international stability and economic resilience. The survey forms the foundation of this report, “The World to Come: Strategic Foresight 2026-2027 — Reading the Risks, Building Resilience”.

The exercise was conducted in collaboration with the Strategic Policy Unit (ESA) of the Ministry of Foreign Affairs of the Netherlands, highlighting the importance of international cooperation in forward-looking policy analysis through the exchange of perspectives and methodological approaches. Insights gathered through this survey highlight several developments that need to be anticipated and addressed, among others, the growing concern over the potential supply chain disruptions caused by climate-related shocks.

These findings point to a broader reality: geopolitical, environmental, technological, and economic dynamics are increasingly intertwined, amplifying their collective impact on global stability and resilience. For policymakers and strategists, this evolving landscape reinforces the importance of strengthening strategic awareness and preparedness of the current global environment to safeguard national interests. Beyond identifying emerging trends, the exercise also seeks to enrich policy deliberation and strategic planning, and contribute to the development of more anticipatory diplomatic strategies.

Finally, foresight is essential to navigate uncertainty with clarity and purpose. In an increasingly complex world, the ability to read emerging risks and translate them into effective policies will remain indispensable to achieve resilience.

WHAT IS FORESIGHT?

Strategic foresight is a way of imagining the future so that we can be prepared in the present. It is not a crystal ball or a prediction machine. It is a way of thinking that invites us to look beyond the obvious, to notice signals of change, and to weave them into stories about what tomorrow might hold. In a nutshell, foresight helps us prepare for uncertainty by imagining possible futures.

The world moves faster than traditional planning can keep up. Technology evolves in leaps, global politics shift unexpectedly, and environmental pressures grow more urgent every year. Without foresight, policy risks becoming reactive by chasing events after they happen. Foresight can help organizations anticipate challenges, spot opportunities, and design strategies that remain relevant even when circumstances change. It is a way of turning uncertainty from a threat into a source of resilience and creativity.

The first exercise of foresight at the Foreign Policy Strategy Agency (FPSA) began in 2024 as the outcome of the Policy Planning Dialogue (PPD) between Indonesia and the Netherlands. The dialogue marked a turning point for FPSA in embedding foresight into its policy planning for the first time. For the Agency, this was not just a technical exercise but a new way of thinking. It is an introduction to a discipline that challenged old habits and demanded openness to uncertainty.

Foresight is not about finding the “right” answer, but about cultivating the ability to think differently, embracing uncertainty, and preparing for future that may surprise us. It is a story of learning and unlearning, of building resilience through imagination, and of turning foresight into a living practice of foreign policy strategy.

The foresight exercise itself was far from smooth. It is a process of continuous learning and unlearning which involved trial and error, moments of doubt, and the realization that foresight is as much about culture and mindset as it is about tools and scenarios. Even by the time of the second exercise, we are still grappling with question such as “did we ask the right questions?” Yet, each step became part of a larger learning experience for the Agency. At the end of the day, it is not a one-off project but a continuous practice. It is one that grows richer through dialogue, iteration, and reflection.

OVERVIEW

“The World to Come: Strategic Foresight 2026-2027” is a survey report that presents an analysis of anticipated global and regional trends for 2026, based on responses from 122 Indonesian diplomats. Conducted in November 2025, the survey examined 15 emerging events, evaluating their probability of occurrence and their potential impact on Indonesia. Five of the questions were created in collaboration with the Ministry of Foreign Affairs of the Kingdom of the Netherlands and incorporated into their annual survey. Results of the mirroring questions were compared and analyzed, providing a tactical layer to this document.

This report focuses on four principle findings of the survey.

First, climate shocks are expected to intensify in the near future and exert broader systemic effects. Extreme weather events –including, but not limited to droughts, floods and severe storms– are projected to disrupt critical infrastructure and global supply chains, particularly in trade-dependent regions. These disruptions may affect food systems, energy markets and logistics networks, generating cascading economic consequences across continents. At the same time, mounting fiscal and political pressures could lead some governments to scale back environmental commitments. Energy security concerns may encourage renewed reliance on fossil fuels, slowing the pace of global green transition and deepening the gap between climate ambition and implementation.

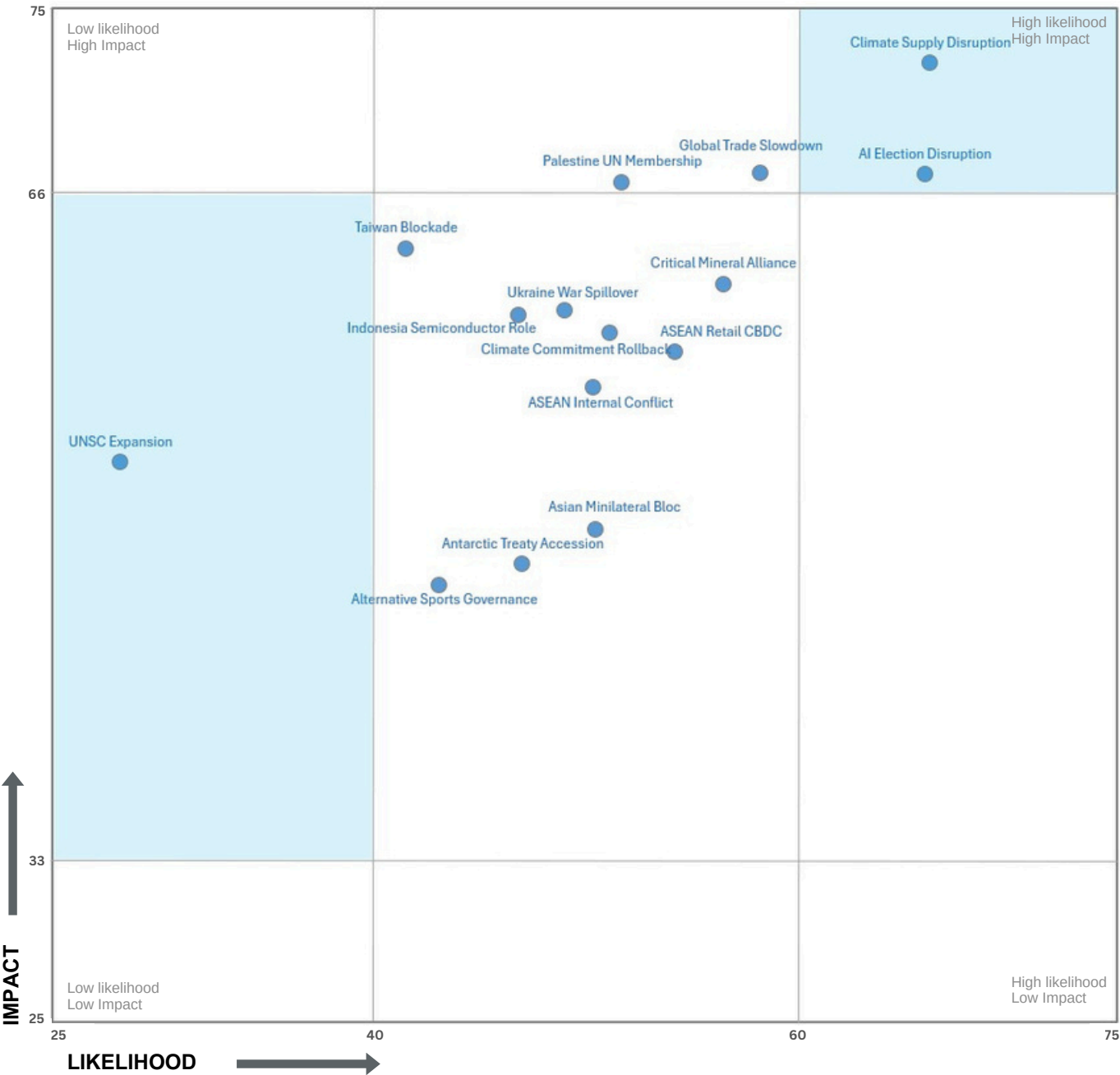
Second, technological developments, particularly artificial intelligence, will increasingly shape domestic political stability and public trust. The 2026 United States midterm elections are expected to become a critical test case for the political impact of AI-driven misinformation and disinformation. The proliferation of deepfakes, synthetic media and automated propaganda may intensify political polarization and erode institutional legitimacy. As digital manipulation tools become more accessible, the ability of governments and societies to manage the integrity of information will become a key determinant of democratic resilience.

Third, the global economic environment is likely to face a period of stagnation, driven by protectionist policies and geopolitical rivalry. Slowing trade growth may accelerate the formation of strategic economic blocs and supply chain alliances, particularly in sectors linked to critical minerals and advanced technologies. Competition for control over strategic resources and semiconductor ecosystems will intensify. Within this context, Southeast Asia, including Indonesia, could emerge as an emerging node in semiconductor manufacturing and technology supply chains. Meanwhile, financial innovation is likely advancing as well, with the possibility that any ASEAN country may launch a retail central bank digital currency, signaling shifts to a certain degree in regional financial architecture.

Fourth, geopolitical fragmentation in the near future is expected to deepen across multiple regions. The prolonged Russia–Ukraine war may generate spillover effects, while strategic rivalry in the Indo-Pacific could increase the likelihood of coercive scenarios, such as that of maritime blockades around Taiwan. At the same time, minilateral security arrangements are likely to proliferate as states seek flexible coalitions to manage regional threats. Even within ASEAN, the possibility of renewed bilateral disputes highlights the growing complexity of regional stability. In the broader multilateral arena, debates over Palestine’s full UN membership and potential reform or expansion of the U.N. Security Council may further test the legitimacy and adaptability of the post-1945 institutional order.

These developments suggest that the international system is entering a period of heightened volatility, marked by fragmented governance and overlapping crises. For Indonesia, navigating this environment will require strengthening strategic resilience, diversifying economic partnerships and reinforcing diplomatic engagement in both regional and global forums. The challenge ahead lies not only in anticipating disruption but also in positioning Indonesia to adapt and lead amid a rapidly transforming world order.

MATRIX QUADRANTS



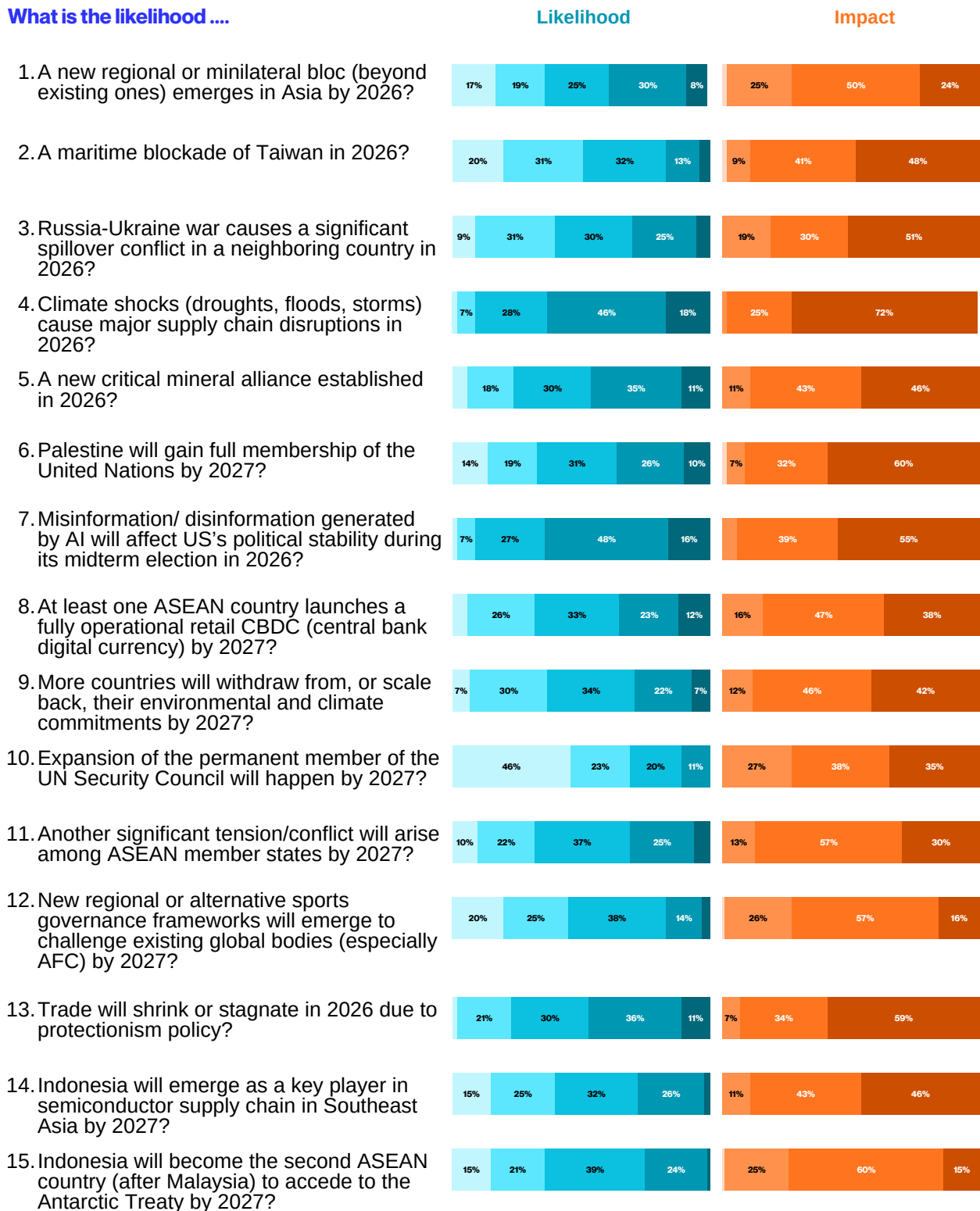
Likelihood	Impact
0-20 : Very Low	0 : No Impact
21-40 : Low	0.01-33 : Low
41-60 : Moderate	33.01-66 : Moderate
61-80 : High	66.01-100 : High
81-100 : Very High	

SUMMARY OF LIKELY EVENTS AND THEIR IMPACTS



SUMMARY OF LIKELY EVENTS AND THEIR IMPACTS

What is the likelihood



CHARTING THE MAJOR GLOBAL TRENDS

The result of the survey from MoFA colleagues revealed several major global trends anticipated for 2026 of each four principal findings previously mentioned. These trends include:

Melting Momentum: Climate Shocks

In 2026, intensified climate disasters, namely droughts, floods, storms, are expected to disrupt the global supply chains, straining food, energy, and logistics sectors. However, mounting economic pressure may cause governments to reduce environmental commitments by 2027 rather than intensifying their effort to strengthen it, potentially increasing fossil fuel use and sidelining green transition goals as short-term energy security overshadows long-term climate action.

Misinfo Mayhem: AI Amplifies Political Instability

AI-generated misinformation and disinformation will intensify polarization and institutional distrust during the 2026 U.S. midterm elections. The rapid spread of synthetic content and deepfakes may undermine electoral legitimacy, heighten social fragmentation, and test democratic resilience. Therefore, political stability will increasingly hinge on information governance capacity.

Geo-Economic Gridlock: Trade Stagnation, Strategic Minerals, and Digital Currency Realignments

Global trade is expected to slow or stagnate in 2026 due to rising protectionism, confirming the IMF's lethargic economic growth forecast in the said year. This will accelerate strategic realignments, including new critical mineral alliances (like the U.S.-led Indo-Pacific critical minerals supply chain initiative announced in 5 February 2026) to mitigate supply chain risks. Despite not being part of the US-led critical mineral alliance in the Indo-Pacific and positioned within growing geoeconomic rivalry, Indonesia is projected to emerge as a key semiconductor hub in Southeast Asia. Concurrently, an ASEAN country will likely launch a retail CBDC by 2027.

Fragmented Faultlines: Blocs, Blockades, and UNSC Stretches

Rising geopolitical fragmentation will sharpen regional tensions, including potential spillover effects from the Russia–Ukraine war in 2026. Therefore, minilateral blocs in Asia may emerge alongside heightened risks such as a maritime blockade of Taiwan, reflecting deepening strategic rivalry. Furthermore, the tumultuous period of tension between ASEAN member states in 2025—that is, Thailand and Cambodia—might rise the possibility for intra-ASEAN disputes to erupt 2027. Simultaneously, renewed pressure for Palestine's full U.N. membership and possible expansion of the U.N. Security Council will test the durability of the post-1945 institutional order.

WHEN CLIMATE HITS HARD AND COMMITMENTS FRAY



A European Space Agency (ESA) Sentinel-2 satellite image shows extensive flooding across eastern Lhokseumawe in Aceh, where homes, farmland, and coastal areas remain submerged following days of extreme monsoon rainfall. (Photo: European Space Agency)

Looking ahead to 2026, climate shocks, such as droughts, floods, storms, and other extreme weather are not just a possibility. They are becoming a regular part of the global landscape, hitting more often and with greater force, pushing local communities and economies past their breaking points. When cities and infrastructures such as road, railways, or ports get hit, the damage does not stay local. The ripple effect travels fast, throwing off global supply chains. Some regions that depend on trade or serve as important transport hubs, e.g. Southeast Asia, sit right in the path of cyclones, heavy rain, and floodwaters. That leaves trade and distribution channels exposed, even as new threats keep piling on. It is not just the weather: geopolitical tensions and the push to decouple economies are stretching supply chains even thinner. All signs point to more disruption and more volatility in the years ahead.

On the policy side, the outlook is not much brighter. The odds that more countries will pull back from climate commitments by 2027 is real, thanks to economic, political, and geopolitical pressures. Some major emitters have already walked back environmental rules or watered down sustainability laws, often under pressure to shore up their own economies. The United States, for example, has stepped away from key climate agreements, a move that gives cover to others to do the same. Sure, most countries still sign on to the Paris Agreement and keep submitting new climate plans, but too many of these pledges fall short. Ambition is lacking, and even among wealthy countries, there is a widening gap between promises and real action.

When climate disasters get worse and political will start to fade, things can spiral. Disasters are likely to strain budgets, disrupt food and trade, and spark unrest. That makes it even harder for leaders to stick

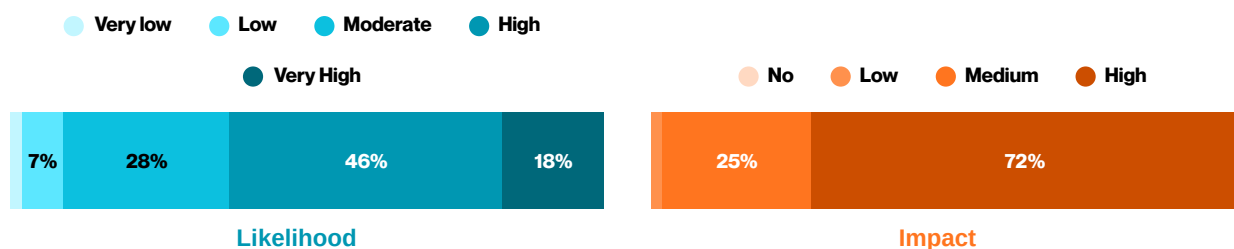
with tough climate policies. They often shift focus away from climate to more immediate concerns—jobs, energy, security, rivalries. The result? Global cooperation breaks down. Countries strike out on their own, adaptation and mitigation efforts start to fragment, and the world's most vulnerable get left behind.

Reflecting back to COP30, which was convened in Belém, Brazil, from 10–21 November 2025, countries demonstrated their commitment to compromise through the adopted Mutirão Decision text (Belém Political Package), which bundled stalled negotiations on finance, adaptation, and transitions into a unified consensus. Brazil's presidency facilitated the Baku to Belém Roadmap, mobilizing at least \$1.3 trillion annually by 2035 for developing countries across five priority fronts (the 5Rs), alongside tripling adaptation finance targets.

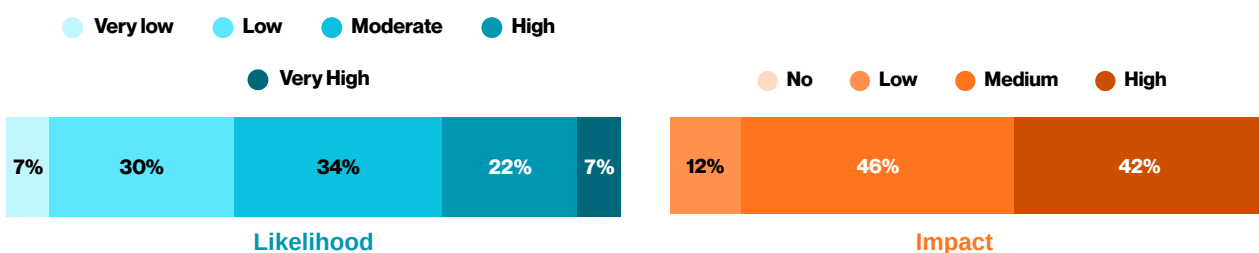
UNFCCC technical reports from early 2026 revealed post-COP30 updates to Nationally Determined Contributions (NDCs) reflect only partial adoption of the 5Rs framework. Developing states have cited persistent delays in financial disbursements, which compound supply chain frailties in trade-vulnerable regions such as Southeast Asia, while Brazilian government assessments from the official COP30 site note how geopolitical discord further softened mandates for fossil fuel transitions.

Breaking out of this cycle takes a real shift in how to solve the problem. Supply chains need to be strengthened, diversified, and less vulnerable to shocks. That means investing in adaptation and mitigation technologies, and coming up with smarter ways to finance countries that need help most. Diplomacy matters too. We need to breathe new life into multilateral climate efforts, bake climate risk into security and economic planning, and make the most of new tools: better data, early warning systems, cleaner energy tech. It is not just about signing new agreements or setting targets. The real challenge is making climate action compatible with everyone's bottom line, as a way to boost competitiveness and stability, not a trade-off. Such effort may turn things around and steer the world toward something more secure and sustainable.

Climate shocks (droughts, floods, storms) cause major supply chain disruptions in 2026?



More countries will withdraw from, or scale back, their environmental and climate commitments by 2027?



ALL EYES ARE STILL ON **THE U.S.**



The United States remains the single most consequential external variable in the global equation. The world may be fragmenting, but all eyes are still on Washington, D.C. (Photo: Tasos Katopodis/Getty Images)

If 2025 was defined by watchful anticipation, 2026 will be shaped by adjustment. The survey results for Strategic Foresight 2026 reaffirm a central reality: despite diversification efforts and multi-alignment strategies, the United States remains the single most consequential external variable in the global equation. The world may be fragmenting, but all eyes are still on Washington, D.C.

In the Strategic Foresight 2025, we assessed that significant changes in U.S. foreign policy toward the Indo-Pacific were viewed as “likely” to “highly likely” (42 per cent), with 54 per cent anticipating high impact. Our 2026 survey results reveal a clear continuity of concern, where it has matured into a structural assumption: U.S. policy volatility –whether in trade, technology controls, alliance management, or regional security posture– is now treated as a baseline condition rather than an anomaly.

For Indonesia and the wider region, it reinforces a strategic paradox. On one hand, the U.S. remains indispensable militarily, financially and technologically. On the other, its unpredictability amplifies systemic volatility, as allies are pressed to shoulder greater burdens, partners are measured through the lens of strategic competition and rivals face tougher containment. The gravitational pull of Washington’s decisions continues to shape calculations from Brussels to Beijing, and acutely so in the Indo-Pacific. This paradox has three implications.

First, the U.S.–China strategic rivalry remains the staple menu of the international system. Even where conflicts may de-escalate, such as the Russia–Ukraine war or parts of the Middle East, tensions in the Indo-Pacific continue to command disproportionate strategic attention. Increased Chinese military

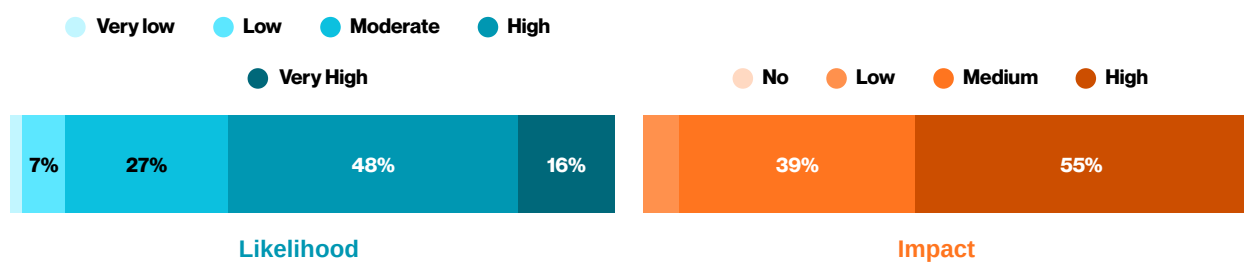
activity around the Taiwan Strait was already assessed as realistic with medium-to-high impact. In 2026, the interplay between Beijing's assertiveness and Washington's deterrence posture will likely intensify, not subside.

Secondly, economic statecraft will remain a primary arena of contestation. Protectionist tendencies, supply chain securitization, and export controls are no longer temporary disruptions, but rather embedded features of global trade. For Indonesia, this reinforces the urgency of insulating our economy from external shocks, through critical mineral downstreaming, diversifying sources of FDI and expanding local currency settlement. This is where strategic autonomy ceases being rhetorical and emerges as macroeconomic necessity.

Third, the U.S. domestic politics will continue to radiate global consequences. Electoral cycles, congressional dynamics and regulatory shifts will directly affect security cooperation frameworks, climate financing and digital governance. Even Indonesia's engagement with alternative platforms –BRICS, OECD accession, etc.– will effectively take place in the shadow of U.S. positioning.

2026 would be a year of more sobering reality. The world is no longer merely watching Washington; it is bracing for it. The United States will remain pivotal, but our foreign policy cannot revolve around unpredictability. This demands the overarching question that remains: how do we prepare for and navigate through the shifts, rather than be surprised at their arrival?

Misinformation/ disinformation generated by AI will affect US's political stability during its midterm election in 2026?

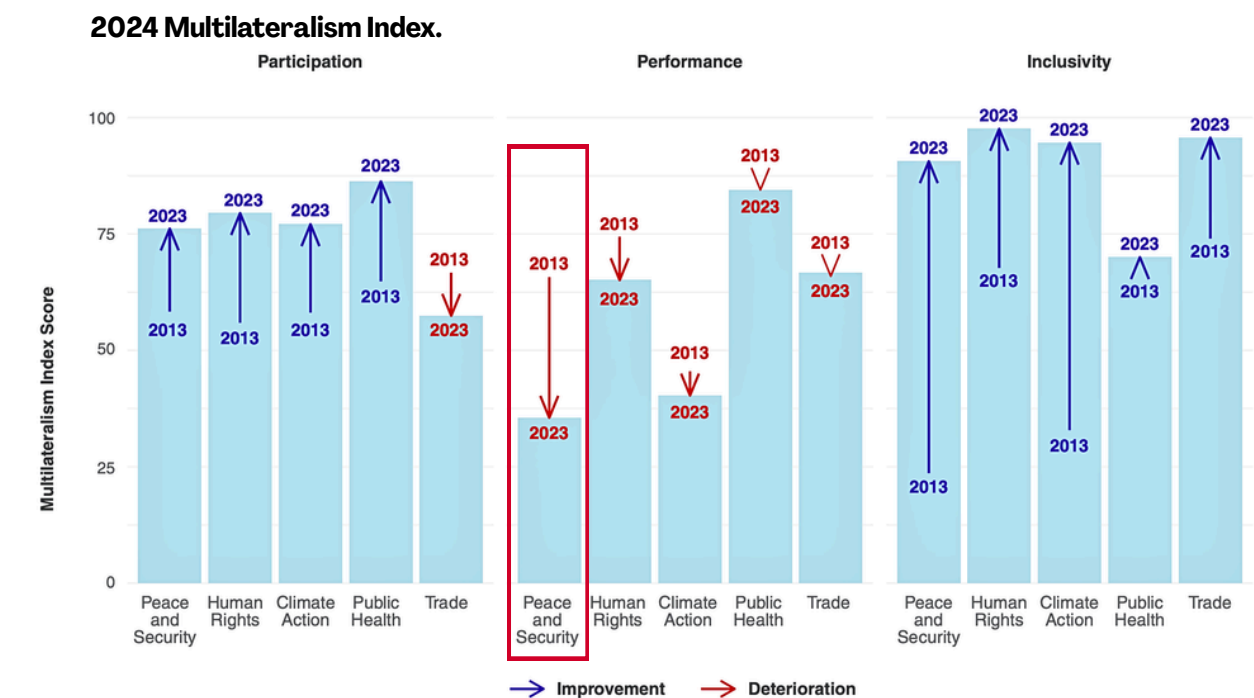


WORLD WITH COALITIONS À LA CARTE

"Cooperation is like water. If it sees it's being blocked, it just finds other ways because cooperation is a necessity and not a luxury." - Børge Brende

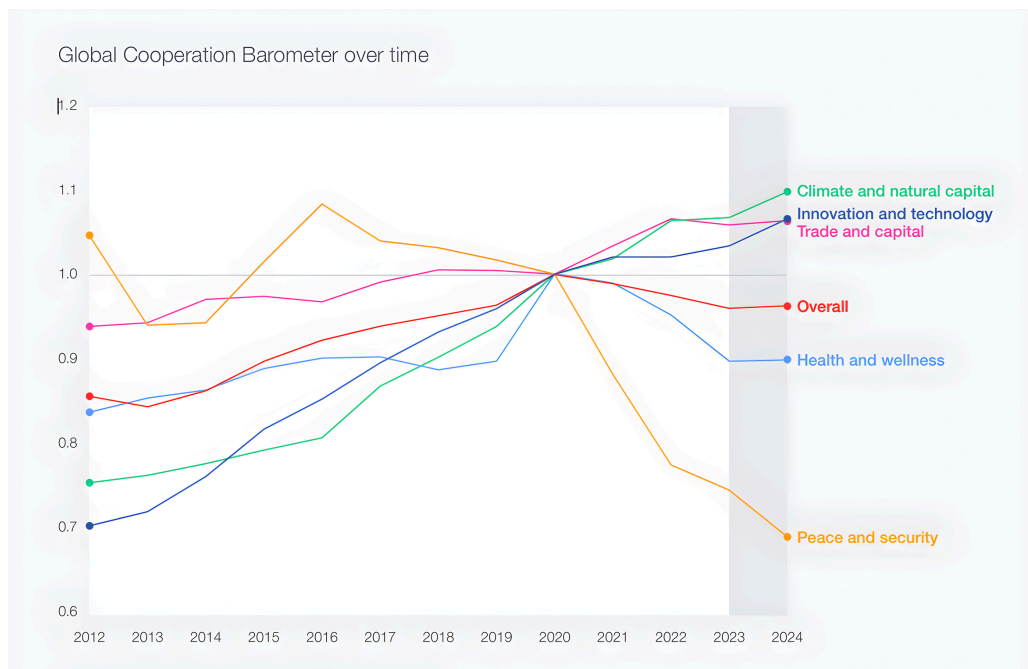
In the current global landscape, numerous nations have prioritized their individual interests over a common objective of united efforts. International laws, which were once a foundation, are now often applied only when it suits certain interests. Global institutions are struggling to keep pace with the rapid changes. Rules that we all agreed on are being broken without any consequences. Some countries are no longer taking their responsibilities seriously. Countries are now working together making deals rather than building trust.

The 2024 Multilateralism Index shows this situation. Although participation is growing and becoming more inclusive, the system still struggles to handle crises quickly enough. The multilateral system is still working but it's not moving at the same speed as the problems we're facing. The fragmentation of the international system is intensifying, with traditional mechanisms proving increasingly inadequate for managing or de-escalating global tensions.



Source: Institute for Economics & Peace

The Global Cooperation Barometer reflects the retreat from global multilateralism as metrics tied to multilateral mechanisms have dropped. For example, by the end of 2024, peacekeeping activity, multilateral resolutions and health aid had all dropped by more than 20 per cent since the pre-pandemic level of 2019, despite the number of conflicts and the need for humanitarian assistance increasing in the same period. In 2024 alone, foreign aid dropped 11 per cent, a trend that has been exacerbated in 2025.



Source: World Economic Forum and McKinsey & Company

As multilateral approaches become more fraught, new, smaller and more agile coalitions (both at the inter- and intra-regional levels) are filling the gaps. We have seen the growth of ad hoc/minilateral cooperation in recent years, such as AUKUS, The Quad, and even the Board of Peace. This pattern of selective cooperation in which countries choose when and how to engage based on immediate interests has created what we might call “coalitions à la carte.” States increasingly form temporary groupings to address specific issues often bypassing established institutions. These coalitions can be effective in the short term but they rarely build trust.

The downside is that when rules are optional and commitments are negotiable, the idea of collective security weakens. Countries may find themselves aligned today and opposed tomorrow depending on shifting calculations of advantage. What was once a system of shared responsibility risks becoming a marketplace of transactional deals.

If this trend continues, global governance will face even greater fragmentation. Institutions like the UN, WTO, and others will struggle to remain relevant unless they adapt to faster decision-making and stronger enforcement mechanisms. Without reform, crises will continue to outpace the system's ability to respond.

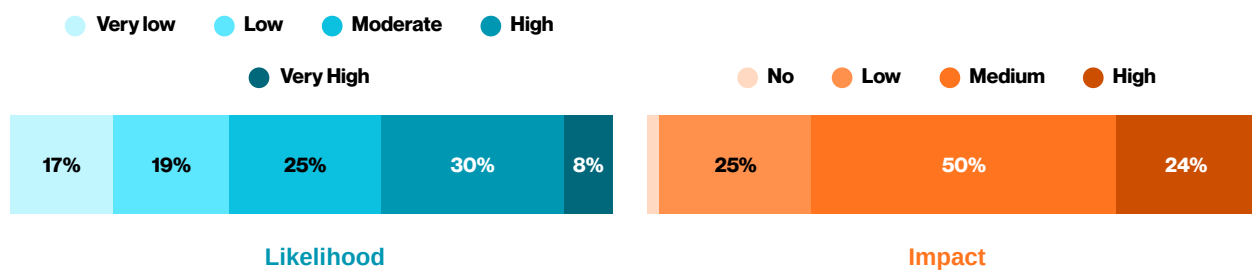
At the same time, it's easy to see why countries are turning to coalitions à la carte. In today's uncertain world, countries are looking for flexibility as a way to hedge risks and keep their options open. In trade, for instance, growing tensions among the biggest economies have pushed smaller, trade-dependent states to step up. The Future of Investment and Trade (FIT) Partnership (launched in 2025 by New Zealand, Singapore, the UAE, and Switzerland) is one example.

Similar patterns are visible in sensitive areas like technology, where the U.S. is reinforcing critical mineral ties with Australia, Canada, and Japan, while AI collaboration is expanding among India, the Gulf, Japan,

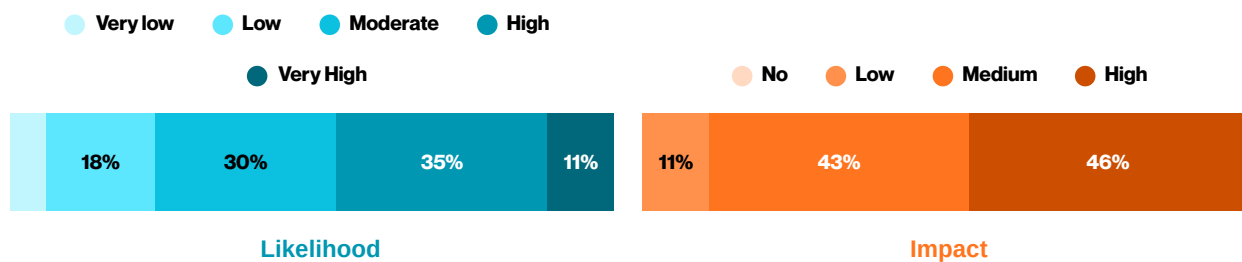
and Europe. On climate, the E.U. is pursuing competitiveness alongside decarbonization through measures like the Net-Zero Industry Act and Critical Raw Materials Act. Regionally, projects such as ASEAN's LTMS-PIP (The Lao PDR-Thailand-Malaysia-Singapore Power Integration Project) power-trading scheme and Africa's new Medicines Agency highlight efforts to strengthen energy security and health sovereignty.

Across these domains, cooperation tends to be strongest where clear national interests (often economic) align, reflecting what U.N. Secretary-General António Guterres has called 'hard-headed pragmatism.' As much as this instinct makes sense but it has to be balanced with the reality that no nation can tackle global challenges alone. Coalitions à la carte need to back up multilateralism. The question is: how do we make them complementary to each other?

A new regional or minilateral bloc (beyond existing ones) emerges in Asia by 2026?



A new critical mineral alliance established in 2026?



FLASHPOINTS AND FAULT LINES

As we enter 2026, the world is no longer in a phase of anticipating policy shifts from major powers, such as the Trump Factor observed in 2025. It has shifted toward a more volatile reality, characterized by the emergence of geopolitical flashpoints and increasingly stark regional fault lines. In a true political realism sense, the 2026 survey forecasted the prospect and consequences of three events.

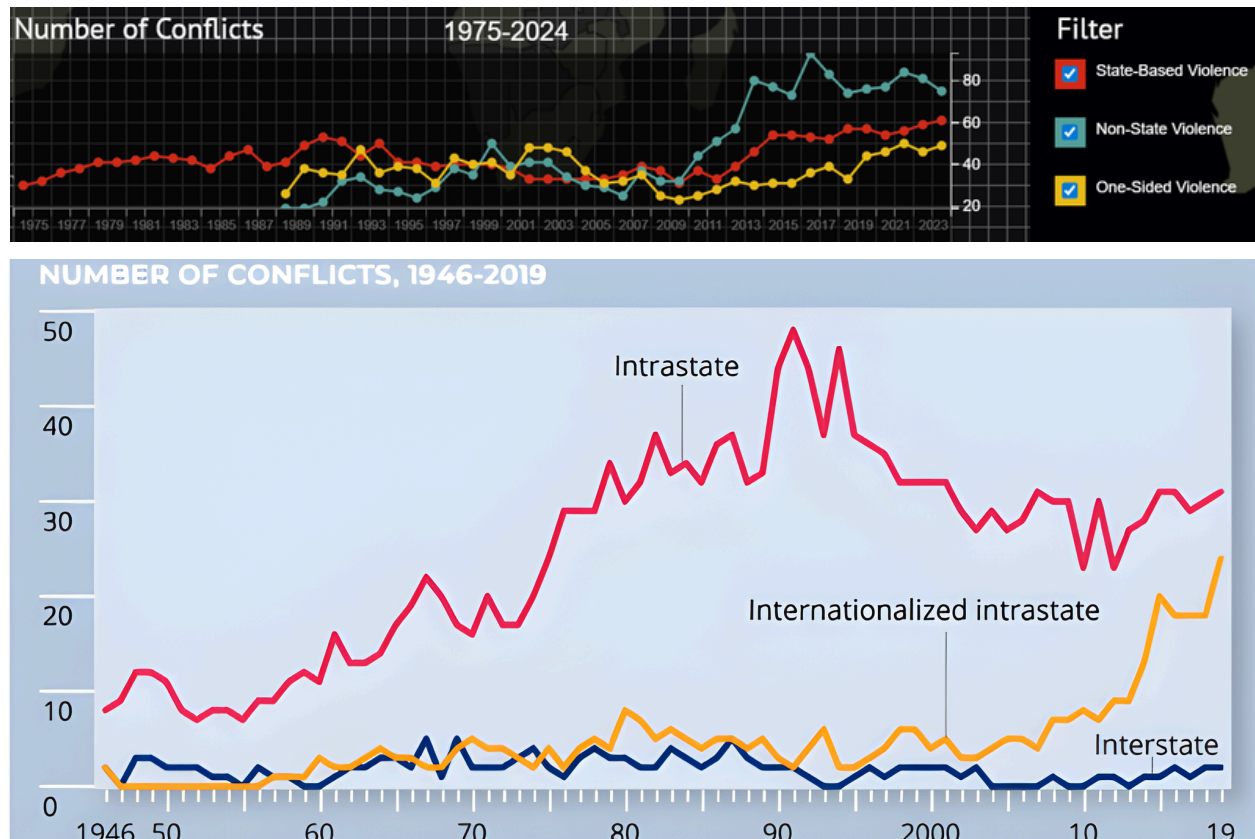
First, the flashpoint of the Taiwan Strait has disruptive potentials, not only to our vision for Indo-Pacific stability, but also to arteries of global economy. Rising frequency of military drills and intensifying U.S.–China rivalry have made the Taiwan Strait a potential chokepoint, threatening global trade routes, energy security, and Indo-Pacific stability. Based on the 2026 survey results, the likelihood of a maritime blockade of Taiwan in 2026 is considered "moderate". The primary concern for our economy, however, lies in its consequences, where it is assessed as "medium to high impact" event at 63/100 scale. A blockade would not only trigger military escalation, but also paralyze global supply chains, necessitating Indonesia to accelerate efforts to strengthen strategic autonomy and diversify partnerships, with the view to safeguard our national economic interests.

Secondly, while continental spillover of the Russia–Ukraine flashpoint is still uncertain, its impact would be severe. The protracted war risks spreading into the immediate vicinities of the Baltics, Scandinavia and Poland, thus raising the specter of wider confrontation and global economic disruption. Despite hopes for peace negotiations that surfaced in 2025, the outcome of the 2026 survey indicate deep-seated concerns regarding the expansion of the Russia–Ukraine conflict into neighboring countries in the near future. The likelihood of such spillover is rated as "moderate" with consequences of "medium to high impact" nature at 60/100 scale. This uncertainty requires Indonesia to work even more actively in peace diplomacy, while simultaneously preparing for broader food supply chain, energy and security disruptions.

Third, while being the driving force behind decades of peace and prosperity in the Indo-Pacific, ASEAN is also host to fault lines of internal discord. The most immediate challenge to our local stability arises from within the region, with persistent border frictions and ongoing crises in Myanmar continue to test ASEAN's cohesion and might undermine the vision of ASEAN centrality. The data from the 2026 survey reveals a "moderate" possibility for another event of significant tension among ASEAN member states by 2027, forecasted to bear "medium impact" outcome, signifying that our regional cohesion is under stress. These fault lines, if left unmitigated, could erode ASEAN centrality and the effectiveness of ASEAN values, the TAC, Five-Point Consensus, and similar mechanisms.

World Economic Forum's Global Risks Report 2025 highlighted state-based armed conflict, geopolitical fractures and disinformation as top risks. The landscape of identified flashpoints and fault lines demands a fundamental shift from reactive crisis management to proactive strategic hedging. As these geopolitical tremors become more interconnected, Indonesia must recognize that a disruption in the Taiwan Strait or spillover in Eastern Europe will have immediate, non-linear reverberations on our domestic food and energy security.

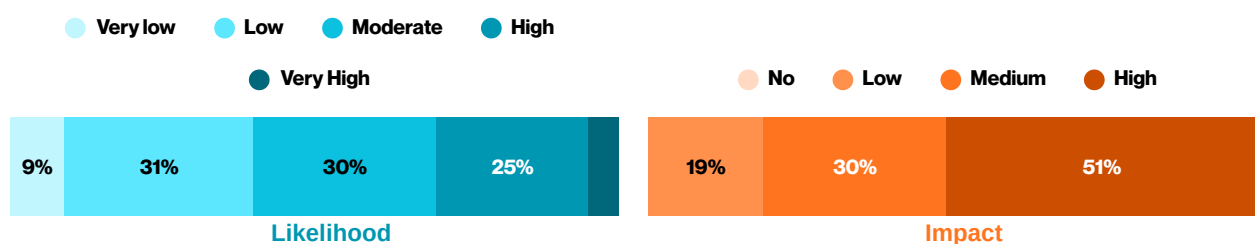
Data from the Uppsala Conflict Data Program (UCDP) revealed that both 2022 and 2024 marked historic peaks in global armed conflicts, with 61 active conflicts in 2024—the highest number since the end of World War II. This alarming rise reflects the growing prevalence of proxy wars, where external powers exploit domestic vulnerabilities to advance their strategic agendas.



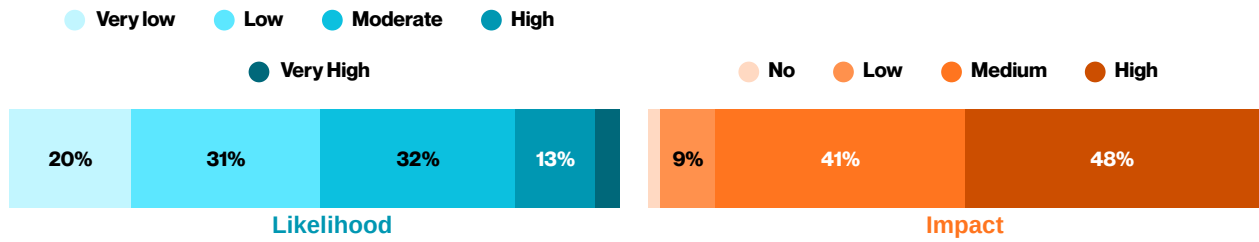
Source: Uppsala Conflict Data Program 2022 and 2024

Therefore, it is evident that Indonesia needs to adapt to navigating in the shifting tectonic plates of uncertainty. We are no longer facing squarely predictable trends and events; we are entering an era where our ability to pivot will define our survival and our sovereignty. In alignment with the *Asta Cita* Vision, our free and active foreign policy must be reinforced with diplomatic resilience and beyond. This involves not only securing the center of our economic gravity through supply chain sovereignty, but also intensifying our leadership to ensure the fault lines in ASEAN does not form into fissures of factionalism or even bipolar politics.

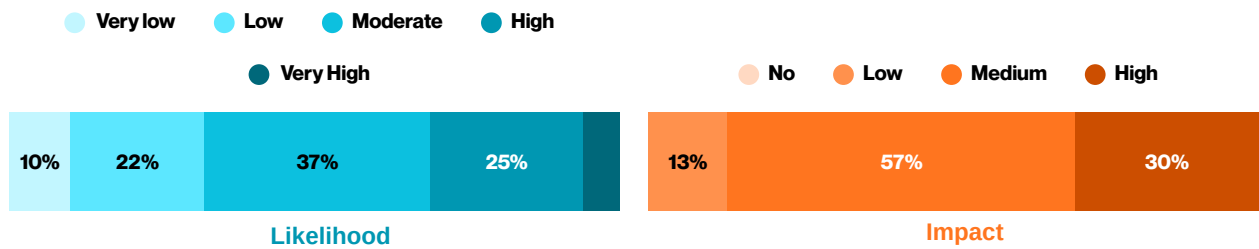
Russia-Ukraine war causes a significant spillover conflict in a neighboring country in 2026?



A maritime blockade of Taiwan in 2026?



Another significant tension/conflict will arise among ASEAN member states by 2027?



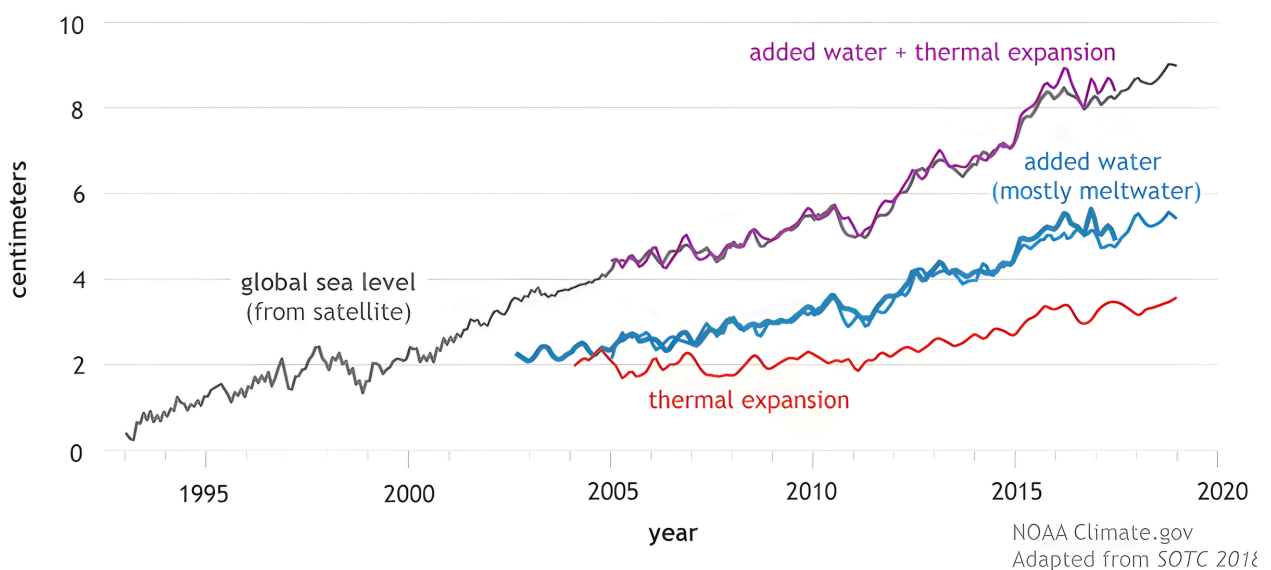
ANTARCTICA AND SEMICONDUCTOR: POTENTIAL PATH TO RESILIENCE?

One climate issue long overlooked and often dismissed since commonly considered as the "unchanging environment," pertains to Antarctica. Recent research on August 2025 reveals compelling evidence of "abrupt changes"—that is, a "climatic or environmental shift" that takes place much faster than expected—in Antarctica, including the "rapid shrinking" of sea ice and accelerated melting of ice shelves.

Previous finding from 2023 indicates that the West Antarctic Ice Sheet, along with certain East Antarctic regions, were losing ice at nearly six times the rate observed in the 1990s. A collapse of this magnitude could drive sea-level rise exceeding five meters. Consequently, millions worldwide face the prospect of their homes damaged or destroyed by rising sea levels and storms within the next three decades. As an archipelagic state, this might put Indonesia in the nature's crosshairs.

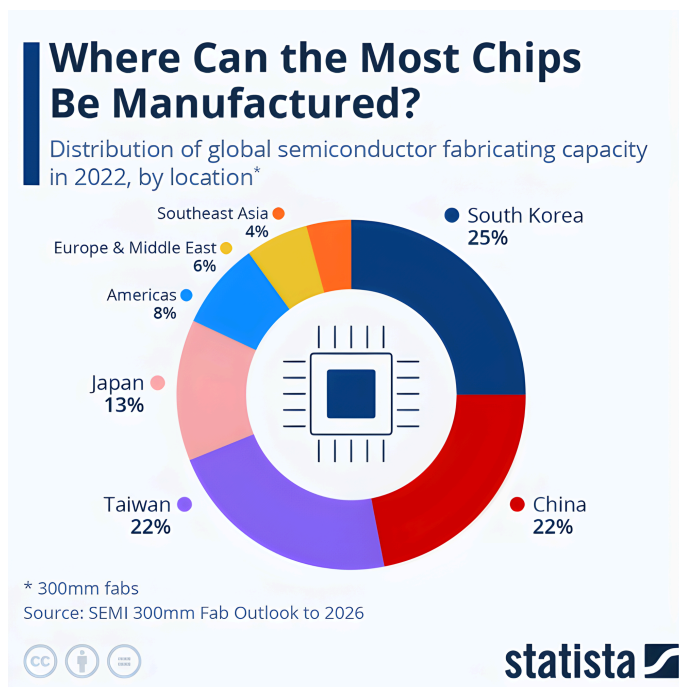
World Bank 2025 data finds that Indonesia "is particularly vulnerable to sea-level rise", which approximately 4.2 million Indonesians could face permanent inundation between 2070 and 2100 without further mitigation. Research by *Institut Teknologi Bandung* (ITB) scholars further estimates that Antarctic ice melt-induced sea-level rise threatens 10.4 million Indonesians with annual coastal flooding, potentially inflicting annual economic losses of 3.3 billion U.S. dollars; these could escalate to 7 billion U.S. dollars yearly if the rise surpass one meter. Thus, the research notes that Antarctic's grim transformations represent a long-term risk investment for archipelagic states, including Indonesia.

Contributors to global sea level rise (1993-2018)



The picture shows how thermal expansion and melting land ice contributed to the sea level rise over time.

Source: NOAA Climate.gov, quoted by The Conversation



Source: Statista



Semiconductor manufacturer per countries, 2022

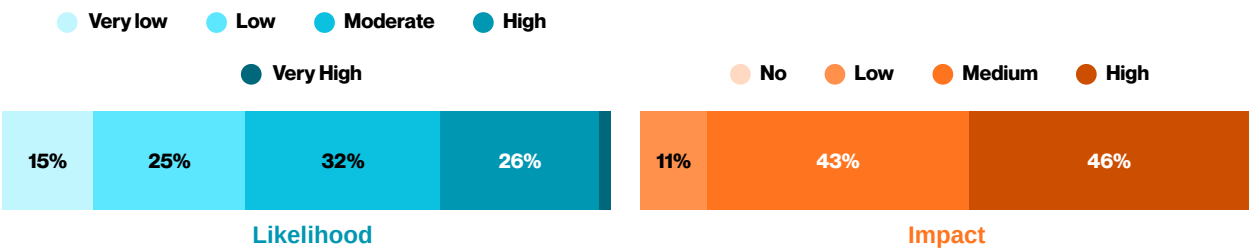
Additionally, aside from climate issues, contemporary discourse increasingly highlights semiconductor geopolitics. Semiconductors constitute the core of modern technology, powering devices such as smartphones, enable the use of artificial intelligence, to military hardware and industrial machinery. Given their indispensability to global economic stability and national security, semiconductor supply chains have emerged as fiercely contested geopolitical battlegrounds. Some even argue that the victor is poised to secure paramount global influence.

Currently, Taiwan—specifically Taiwan Semiconductor Manufacturing Corporation (TSMC)—dominates global production, accounting for 60 per cent of worldwide semiconductors and over 90 per cent of advanced variants, according to The Economist. This hegemony, however, raises alarms over supply chain fragility, especially the vulnerability against disrupting scenarios such as Chinese invasion of Taiwan or the potential over the renewed pandemics. Consequently, major powers—namely the U.S. and China—have pursued the self-sufficiency path on semiconductors by tightening their supply chain security and maintaining their competitive edges through "decoupling" efforts by the U.S. and China from Taiwan, despite high costs; export bans on semiconductor technology by the U.S. to China; and China's restrictions on critical minerals.

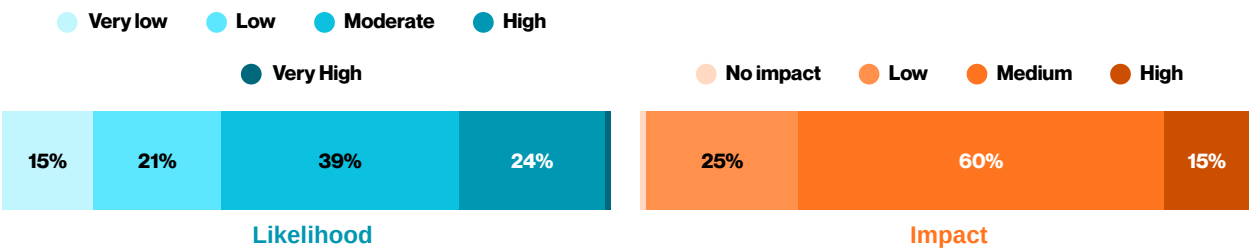
Given semiconductors' vital role as economic growth engines, it is imperative for Indonesia to contemplate about its direct integration into these supply chains. This is primarily due to the fact that several ASEAN states have already capitalized this. Singapore and Malaysia host wafer foundries, while downstream assembly, testing, and packaging have already mapped out in the Philippines, Thailand, and Vietnam. In this regard, Indonesian MoFA colleagues estimates a 60.7 per cent likelihood that Indonesia will emerge as a key player in semiconductor supply chain in Southeast Asia by 2027.

In an era of heightened volatility—marked by great-power geopolitical and geo-economic competition—coupled with escalating climate perils, ambitious strategies for economic resilience and climate adaptation demand concrete actions. These encompass independent development of economic hubs via the semiconductor surge, alongside collective multilateral efforts on transnational challenges like climate change despite the absence of the U.S.

Indonesia will emerge as a key player in semiconductor supply chain in Southeast Asia by 2027?



Indonesia will become the second ASEAN country (after Malaysia) to accede to the Antarctic Treaty by 2027?



RECOMMENDATIONS

1. Back to ASEAN

In an era marked by escalating global conflicts, proxy wars, and climate systemic risks, Indonesia should place ASEAN resilience at the core of its collective strategy. For Indonesia and the rest of the region, building strong collective systems is what will help us ride out the turbulence and protect our stability. ASEAN needs a standing emergency leaders' meeting mechanism that can be convened within hours of a crisis, ensuring rapid coordination to identify threats, share verified information, and agree on immediate collective actions to safeguard regional stability and resilience.

2. Climate & Technology Risks Policy

- Mainstream climate security and technological governance into foreign policy formulation by advancing climate finance diplomacy, maritime resilience, and AI governance partnerships.
- Strengthen ties with scientific institutions and international organizations for evidence-based policymaking. Engage global polar research institutions to integrate Antarctic and Southern Ocean datasets into Indonesia's sea-level monitoring, coastal resilience, and disaster preparedness systems.
- Integrate meteorological early-warning systems and disaster-management institutions with economic and logistic authorities.
- Map climate-vulnerable infrastructures, such as ports, inland transport corridors, industrial zones, and food-distribution hubs.
- Develop contingency coordination procedures to maintain the movement of essential goods during major disruptions.

3. Semiconductor & Critical Minerals Partnerships

Consolidate Indonesia's semiconductor roadmap and mineral downstreaming policy into tailored partnership packages with major technology ecosystems (the E.U., China, Japan, South Korea, Taiwan, the U.S.) and resource-rich partners in Latin America and Africa.

4. Indonesia as Bridge-Builder

Leverage Indonesia's memberships (ASEAN, G20, BRICS, OECD, OIC, IORA, D-8) to align cooperation on supply chains, climate resilience, maritime security, digital governance, energy transition, and development finance—acting as a connector across fragmented coalitions.

REFLECTIONS ON 2024/2025

“You can’t really know where you are going until you know where you have been.” – Maya Angelou

2024 marked our first institutional attempt at strategic foresight. We weren’t trying to predict the future, but rather to test how well we could think ahead in a world that feels more uncertain every day. It was for us, an exercise of anticipation and institutional learning.

Looking back at our projections for 2025, the event that we anticipated most is significant changes in U.S. foreign policy toward the Indo-Pacific following the U.S. election in 2024. At the time the survey was conducted, the election had not yet taken place, but respondents already sensed that the outcome, regardless of the winner, would likely lead to recalibration in Washington’s external posture.

We were right in a sense that it became the primary highlight of 2025, but it spiralled beyond our expectations. When Donald Trump was taking the Oval Office again for the second time in 2025, the pace and scope of policy changes spiralled far beyond the Indo-Pacific. Is it ideology that drives changes in foreign policy this time? Or is Trump more like King Aerys II Targaryen in Game of Thrones, whose personal leadership style is just erratic and unpredictable?

We were also right about the unlikelihood of a two-state solution and Russia–NATO confrontation in 2025, a ceasefire and its break in Gaza at the start of 2025, and Indonesia’s becoming a full member of BRICS in 2025.

Not all projections materialized as anticipated. Some “high impact” risks, such as systemic supply chain collapse or a major cyberattack, did not unfold at the scale we envisioned. However, foresight is not about being perfectly right. It is about identifying structural drivers of change, stress-testing policy assumptions, expanding strategic imagination, and building anticipatory policy. Yet even in cases where events did not fully materialize, the exercise strengthened our institutional awareness.

Another thing that is worth observing in our first attempt was the tone of our collective conscience. It leaned mostly toward optimism when seeing the future of the events and trends we identified. Why was that? Were we closer to some developments and therefore more hopeful about their outcomes? Or was it simply our own tendency to search for light even in uncertain times?

Optimism sometimes could be understood as a way to look at problems as chances, in the sense that even bad developments could open new doors for Indonesia and the wider region. Perhaps our diplomats chose to see change as something we could navigate rather than something to fear.

Still, optimism has its limits. It can blur risks or make us underestimate the speed of disruption. Our first exercise revealed both sides: the comfort of collective optimism and the sobering reminder that foresight is about preparing for what may go wrong as much as imagining what could go right. 2025 was not just another year of diplomacy; it was the beginning of embedding foresight into Kemlu’s strategic culture.

READING THE FUTURE TOGETHER: COMPARING PERSPECTIVES IDN-NL

The foresight collaboration between the Foreign Policy Strategy Agency (FPSA) of the Indonesian Ministry of Foreign Affairs (IDN) and the Dutch Ministry of Foreign Affairs (NL) enters its second year. Engaging with our counterparts' insights challenges our own assumptions about a changing world, enhances mutual understanding, and strengthens our partnership.

One key observation this year is that the estimations of the likelihood and potential impact of events are more aligned compared to last year. As before, IDN generally estimates the likelihood of events higher than NL. However, unlike last year (when IDN consistently estimated the potential impact lower than NL) this year's assessments show a more balanced perspective.

An interesting point of convergence is the shared expectation regarding the potential maritime blockade of Taiwan. Both parties agree that the potential impact would be significant, though the effects would differ for each country. This topic could be further explored through joint scenario exercises to identify risks and develop shared mitigation strategies.

Another notable observation is that IDN perceives the likelihood of the formation of a new regional or minilateral bloc in Asia, as well as a new critical mineral alliance, to be higher than NL does. Despite this, both IDN and NL consider the likelihood and impact of such developments to be relatively low. This is surprising, given the dynamics of coalition and alliance building in response to ineffective multilateralism, great power competition over critical minerals, and middle-power hedging strategies. It would be valuable to gain deeper insights into each other's perspectives about why coalition building seems unlikely. As a key regional player and a critical mineral-producing country, IDN is likely to play a central role in any future alliance formations.

Finally, while the survey was conducted prior to the climate-related catastrophes in Indonesia at the end of 2025, IDN appears slightly more aware of the growing risks of supply chain disruptions due to climate change than NL. However, it is noteworthy that, despite widespread concern about supply chain vulnerabilities stemming from geo-economic and geopolitical tensions, climate change is not perceived as a significant risk to supply chains. This is striking, given its considerable impact on, for example a basis need like food security. This observation aligns with the broader trend of climate issues being overshadowed by geopolitical priorities, and an important signal for strategists and strategic foresight practitioners.

METHODOLOGY

This report presents insights into anticipated global and regional developments for 2026–2027, combining analytical assessments with survey data collected from Indonesian diplomats serving both at headquarters and overseas. Conducted between 5–19 November 2025, the survey involved **122 respondents**, comprising Heads of Missions, Echelon I officials (Director-General level), Echelon II officials (Director level), as well as participants from the Senior Diplomatic Training and Mid-Career Diplomatic Training programmes.

Respondents were asked to assess 15 pre-selected questions concerning emerging trends and developments expected to shape the international landscape in 2026–2027. Each question was evaluated based on two dimensions: the likelihood of occurrence and the potential impact.

Among the 15 questions, five “mirror questions” were jointly developed with the Strategic Policy Unit (ESA) of the Ministry of Foreign Affairs of the Netherlands. These questions were designed as a reflective exercise, enabling diplomats from both countries to compare perceptions, priorities, and expectations regarding future global developments.

In addition to the structured survey questions, respondents were also asked an open-ended question inviting them to identify the three major events or trends they anticipate will shape global and regional dynamics in 2026–2027. From a total of 366 responses collected, several recurring themes emerged. Geopolitical tensions and conflicts were the most frequently mentioned issue (88 mentions), particularly developments related to the Israel–Palestine conflict. Other prominent concerns included climate change-driven disruptions and disasters (48 mentions), the rise of protectionism and trade wars (37 mentions), as well as the growing implications of artificial intelligence (49 mentions), both in terms of AI-driven risks in political, economic, and social domains and the increasing prominence and adoption of AI technologies.

While recognising the survey’s limited sample size, the breadth of expertise and professional experience represented among respondents offers valuable perspectives on political, economic, and social dynamics, providing a thought-provoking snapshot of the world as seen from the vantage point of diplomacy in 2026-2027.

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The background of the entire page is a close-up photograph of numerous water droplets of various sizes. The droplets are scattered across a light-colored, slightly textured surface, creating a sense of freshness and movement. The lighting is soft, highlighting the rounded shapes and reflections on the water droplets.

MINISTRY OF FOREIGN AFFAIRS
REPUBLIC OF INDONESIA