

Indonesia's Strategic Autonomy in the China–Indonesia Electric Vehicle Cooperation: Balancing National Interest, Energy Transition, and Great Power Rivalry

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ABSTRACT

Indonesia occupies an exceptional geopolitical position in the global electric vehicle transition: it holds the world's largest nickel reserves, commands Southeast Asia's most populous consumer market, and pursues an officially "free and active" (bebas dan aktif) foreign policy doctrine that resists formal alignment with any great power. The emergence of China as the dominant partner in Indonesia's EV ecosystem—through investment by CATL, Tsingshan, BYD, and Wuling—challenges the practical operationalization of this non-alignment principle. This article examines Indonesia's strategic autonomy in managing its EV cooperation with China, interrogating whether Jakarta's resource nationalism and economic diplomacy tools are sufficient to maintain meaningful agency within an asymmetrically structured partnership. Drawing on middle power theory, the strategic autonomy framework, and two-level game theory, and employing a qualitative single-country case study with comparative reference to Malaysia, the article finds that Indonesia's strategic autonomy in the China–Indonesia EV cooperation framework is real but constrained. Jakarta has successfully used nickel down streaming to attract transformative Chinese investment and accelerate EV industrial development; however, the concentration of Chinese capital, technology, and market offtake across the supply chain creates structural vulnerabilities that formal non-alignment rhetoric cannot resolve. The article introduces the concept of "instrumental multilateralism" as an original theoretical contribution and develops policy recommendations for an EV strategic autonomy doctrine combining technology transfer conditionality, domestic innovation investment, multilateral partner engagement, and transparent investment governance.

Keywords: strategic autonomy; Indonesia; China; electric vehicles; nickel down streaming; middle power; hedging; Belt and Road Initiative

INTRODUCTION

The global transition to electric vehicles has repositioned Indonesia from the periphery of the world automotive industry to one of its critical nodes. Indonesia holds the largest nickel reserves globally, along with iron, copper, and bauxite—essential components for battery production (Oehler-Şincai, 2024)—and has leveraged this resource endowment to attract a wave of foreign investment concentrated in smelting, refining, battery precursor production, and, increasingly, vehicle assembly. At the same time, Indonesia commands Southeast Asia's largest vehicle market, with a vehicle population of more than 164 million units (Fathoni et al., 2025), giving the country dual leverage as both a resource supplier and a prospective consumer market in the emerging EV value chain.

Indonesia's EV ambitions are codified in Presidential Regulation No. 55/2019 on the Acceleration of the Battery-Based Electric Motor Vehicle Program, which provides the legal umbrella for the national EV program and has been elaborated through derivative regulations such as Government Regulation No. 73/2019 on the Sales Tax on Luxury Goods (Nuarta & Sukedi, 2024). The framework was broadened by Presidential Regulation 79 of 2023, which expands the scope of policy beyond vehicle adoption to industrialization, supply chain development, fiscal incentives, and infrastructure acceleration (Gugat et al., 2025). These instruments serve Indonesia's commitment under the Paris Agreement to reduce emissions by 32% by 2030 and to achieve net-zero emissions by 2060, with the EV industry identified as a catalyst of the clean energy transition (Nugraha & Hermawan, 2024). The result is a strong domestic incentive structure to attract foreign capital for green industrial development.

The dominant source of that capital has been China. Chinese companies lead the Indonesian nickel-processing industry: of the five largest nickel smelters operating in Indonesia, four are Chinese-owned (Korinek & De, 2023), and Indonesia's downstream nickel project has attracted over USD 30 billion in processing and smelting facilities, mostly from China-based companies (Rivota & Wardhana, 2026). Chinese financing has also shaped the broader infrastructure and industrial landscape, with China's two policy banks financing US\$14.5 billion worth of development projects in Indonesia's power and transportation sectors since 2008, and Chinese FDI reaching more than US\$17 billion between 2015 and 2020, concentrated in the metal industry (42%), transportation, warehousing, and telecommunication (20%), and electricity, gas, and water (19%) (Pramono et al., 2021). Bilateral trade reached US\$78.37 billion in 2021, making China Indonesia's largest trading partner and a significant source of foreign investment (Pambudhi et al., 2024). In the automotive tier specifically, BYD has committed USD 1.3 billion in an assembly plant foreseen to become operational in January 2026 with an estimated capacity of 150,000 units yearly, while Wuling operates with a capacity of 120,000 units per year following an investment of USD 0.7 billion (Oehler-Şincai, 2024). Earlier battery-materials commitments include CATL at US\$5.2 billion, Foxconn at US\$8 billion, and LG Energy Solution at US\$9.8 billion (Radhica, 2023).

This depth of Chinese capital penetration sits uneasily with Indonesia's foreign policy tradition. Since Vice-President Mohammad Hatta's speech of 2 September 1948—when he described Indonesia's position in the Cold War as "rowing between two reefs"—the *bebas-aktif* (independent and active) principle has been the core tenet of Indonesian foreign policy, allowing Jakarta to pursue an independent foreign policy without joining regional or global geopolitical and ideological rivalry (Wnukowski, 2015). The doctrine's contemporary operationalization, often described as "hedging plus," entails engaging all sides to maximize benefits while mitigating risks at both the national level and through ASEAN, thereby ensuring strategic autonomy and agency (Anwar, 2022). The question raised by the EV partnership is whether this doctrine can survive contact with an economic relationship as structurally asymmetric as the one now developing in the nickel–battery–vehicle chain.

The concern is not hypothetical. Econometric analysis of Indonesia's export vulnerability to China reveals a stable long-run cointegrating relationship in which China's GDP significantly increases Indonesian exports, while demonstrating persistent asymmetric interdependence and structural exposure to external shocks, with high import-input dependence and limited export-oriented investment absorption (Maulida & Aji, 2025). Scholars of China's engagement with Southeast Asia likewise warn that statist economic arrangements can generate inefficient resource allocation and incumbency bias, raising concerns about the vulnerability of state capitalist models (Liu & Lim, 2022), and that long-term financial relations with Chinese actors raise the question of whether flagship projects enhance China's leverage over Indonesian foreign policy-making (Schneider, 2021). The Prabowo administration (2024–present) must therefore navigate a complex diplomatic terrain: maximizing EV sector development benefits while preserving Indonesia's strategic autonomy and fulfilling its global middle-power aspirations. Prabowo is widely expected to pursue a more assertive and hands-on foreign policy than his predecessor while still adhering to the foundational "free and active" doctrine, blending nationalist rhetoric with pragmatic engagement as Indonesia seeks to enhance its strategic autonomy amid shifting geopolitical dynamics (Setiawan, 2025).

This article examines Indonesia's strategic autonomy in managing its EV cooperation with China. It asks whether Jakarta's resource nationalism and economic diplomacy tools are sufficient to maintain meaningful

agency within an asymmetrically structured partnership, and what strategies could strengthen Indonesia's bargaining position.

This study is guided by three interrelated research questions. First, how does Indonesia's free and active (bebas dan aktif) foreign policy doctrine shape its strategic choices within the framework of China–Indonesia cooperation in the electric vehicle (EV) sector? Second, to what extent do Indonesia's nickel down streaming policy and economic diplomacy instruments enable the country to preserve its strategic autonomy in the context of growing dependence on Chinese capital, technology, and investment? Third, what policy strategies can Indonesia pursue to strengthen its bargaining position, reduce the risks of asymmetric dependency, and simultaneously maintain a stable and mutually beneficial economic relationship with China in the development of the EV industry?

In addition, this study has three principal objectives. First, it seeks to analyse the extent to which Indonesia is able to exercise strategic autonomy within an EV supply chain increasingly characterized by substantial Chinese investment, technological involvement, and industrial participation. Particular attention is given to the interaction between Indonesia's long-standing *free and active* foreign policy doctrine and the economic imperatives arising from its engagement with China in the EV and battery industries.

Second, the study aims to evaluate the effectiveness of Indonesia's economic diplomacy instruments, particularly the nickel ore export ban, mineral down streaming policy, investment incentives, and domestic industrialization strategy, as mechanisms for protecting and advancing national interests. In this context, the study examines whether these policies have succeeded in increasing Indonesia's value-added production, strengthening domestic industrial capacity, improving its bargaining position vis-à-vis foreign investors, and limiting excessive dependence on Chinese capital and technology.

Third, the research seeks to formulate policy recommendations that can help Indonesia diversify its EV-related economic and strategic partnerships while preserving its important relationship with China. This objective includes identifying possible strategies for attracting investment and technology from a wider range of international partners, strengthening domestic technological and industrial capabilities, improving regulatory governance, and developing more balanced forms of cooperation across the EV value chain. Through these objectives, the study ultimately seeks to assess how Indonesia can maximize the developmental benefits of its EV partnership with China while maintaining strategic autonomy and avoiding the emergence of long-term asymmetric economic dependency.

Existing literature analyzes Indonesia–China EV cooperation from either an economic investment perspective (Humayro & Virgianita, 2024) or a BRI geopolitics lens (Putten & Petkova, 2025). None systematically examines Indonesia's agency—how Jakarta actively deploys foreign policy tools to manage the bilateral asymmetry. This article's novelty lies in applying middle power theory and the strategic autonomy framework to the specific case of EV sector governance under the Prabowo administration, offering the first systematic policy analysis of Indonesia's EV diplomacy in the post-Jokowi era. It further introduces the concept of instrumental multilateralism—Indonesia's use of G20, ASEAN, and BRICS+ platforms as diplomatic buffers against bilateral Chinese pressure—as an original theoretical contribution to the literature on middle power agency in asymmetric relationships.

LITERATURE REVIEW

The body of literature relevant to this study can be systematically organized into four major thematic clusters. These clusters represent the principal strands of scholarly discussion that provide the conceptual, theoretical, and empirical foundations for the present research. Each cluster addresses a distinct dimension of the research problem, while collectively they offer a more comprehensive understanding of the broader academic debate surrounding the subject under investigation. Organizing the existing scholarship into these four clusters also makes it possible to identify areas of convergence and divergence among previous studies, assess the dominant theoretical and methodological approaches employed in the literature, and determine the gaps that remain insufficiently explored. Accordingly, the following review examines each cluster in turn in order to establish

the intellectual context of the study, clarify its position within the existing body of knowledge, and demonstrate the specific contribution that the present research seeks to make.

Statism, State Activism, and BRI-Driven EV Development

The first cluster examines how host countries of the Belt and Road Initiative employ state capitalism to pursue global value chain integration. Tritto's comparative analysis of electric vehicle GVCs in Indonesia and Malaysia shows that BRI generates opportunities for activist states to channel new capital and technologies toward national strategic economic outcomes: in Indonesia, President Widodo's state capitalism efforts employed Chinese investments to bring new smelting and refining technologies to restructure and industrialize the mineral sector, making Indonesia a leading nickel-processing destination for stainless steel production and, more recently, for EV batteries. Both countries employed a mix of statism and state activism, with Indonesia preferring the former through industrial policy interventions prioritizing private sector investment, while Malaysia predilected hybrid forms of state and private sector coordination; industrial policies and Chinese investments brought opportunities but also unintended development outcomes (Tritto, 2025). This Indonesia–Malaysia contrast is theoretically productive: research on Malaysia's response to the BRI demonstrates that even relatively weak and small states are adept at engaging a rising China to advance key projects and further their own agendas, with outcomes dependent on the fulfilment of domestic policy priorities, mutual visions between state authorities, and the advancement of geopolitical interests for both sides (Liu & Lim, 2018). Complementing this, Liu and Lim's study of the Jakarta–Bandung High Speed Rail identifies three characteristics of an emerging transnational state capitalism in Southeast Asia—state-centric direction and operation, simultaneous pursuit of economic and geopolitical interests, and an inability to stem structural weaknesses associated with statist economic directives (Liu & Lim, 2022).

Nickel Downstreaming and Resource Nationalism

The second cluster addresses the political economy of Indonesia's mineral policy. Indonesia, as one of the countries with the largest nickel reserves globally, has enforced a ban on raw nickel ore exports since the enactment of Law No. 4 of 2009 on Mineral and Coal Mining, a policy designed to promote domestic downstream development, enhance commodity added value, and strengthen competitiveness in the global market (Rahmawati & Swara, 2025). The policy's effects were dramatic: production of processed nickel products surged from 24,000 metric tons in 2014 to 636,000 metric tons in 2020; by that year Indonesia had 16 operating nickel smelters, the majority producing NPI and ferronickel, with the five largest smelters reaching a combined annual capacity of 880,000 tons; the number of smelters is expected to increase to 29 by 2025, and Indonesia will likely be the source of almost all the growth in the supply of refined nickel for EV batteries over the next decade (Korinek & De, 2023). Comparative work on downstream diversification in the DRC and Indonesia underscores that although both countries dominate extraction, only Indonesia has been able to move into the higher value portions of the value chain (Burger, 2026). Yet the literature is equally clear on the costs: the downstream project has introduced significant negative environmental and health impacts, including labor safety incidents, deforestation, high carbon-emitting processes, and negative impacts on air quality and water supply, alongside increased reliance on Chinese companies in global battery supply chains (Rivota & Wardhana, 2026). The China–Indonesia new energy partnership thus presents what has been called a significant paradox: immense opportunities for economic growth and industrial upgrading, facilitated by Chinese investment and technology transfer, directly undermined by severe challenges including environmental degradation, governance gaps, resource nationalism, and social conflicts (Fan & Yuliatingtyas, 2025). Indonesia also faces environmental and social trade-offs in exploiting this transition-critical mineral (Utamawati & Yusuf, 2026), and nickel exploitation potentially contributes to the degradation of ecology and human rights protection even as it accelerates economic growth (Nugraha & Hermawan, 2024).

Indonesia's Foreign Policy Doctrine and Hedging

The third cluster concerns the doctrine within which EV cooperation is embedded. The *bebas-aktif* principle—free because Indonesia does not align with either the Western or Communist bloc, active because it pursues a peaceful policy as a loyal member of the United Nations—was designed to allow independent foreign policy without participation in geopolitical rivalry, while active engagement in multilateral forums bolsters

Indonesia's international position (Wnukowski, 2015). Contemporary scholarship describes Indonesian strategy as "hedging plus": engaging all sides to maximize benefits while mitigating risks, ensuring both strategic autonomy and agency, and carrying out middle-power diplomacy through a leading role in promoting ASEAN-centric, inclusive, cooperative wider East Asian multilateralism (Anwar, 2022). In the Indo-Pacific context, Indonesia adopts a hedging strategy that maintains constructive relations with both the United States and China while avoiding formal alignment, reflecting the long-standing "free and active" principle and enabling navigation of geopolitical competition without compromising strategic autonomy (Nasution & Dermawan, 2026). Under Prabowo, this hedging has acquired new instruments: the administration has actively pursued initiatives such as joining BRICS, strengthening maritime security in the Indo-Pacific, and expanding military cooperation with major global powers, marking a shift toward a more assertive and strategic approach that integrates economic interests with national security (Yadav, 2025). Analysis of economic diplomacy specifically finds that Indonesia implements a complex hedging strategy combining soft balancing toward both China and the United States with simultaneous economic bandwagoning through attracting investments and participating in the BRI—a dual approach that maintains strategic autonomy while leveraging economic benefits from both competing powers (Hapsari et al., 2026).

Indonesia's EV Governance and Market Development

The fourth cluster addresses domestic EV policy and adoption. Presidential Decree No. 55/2019 outlines a roadmap to accelerate the adoption of two-wheeled and four-wheeled battery electric vehicles, mandating minimum local content for BEV manufacturers with provisions for purchase incentives and charging infrastructure (Adzhani et al., 2025). The Ministry of Industry elaborated the framework through Regulation No. 27 of 2020 on specifications, development roadmaps, and domestic component calculation, and Regulation No. 28 of 2020 on battery-based electric motor vehicles in completely and incompletely decomposed conditions, alongside 27 Indonesian National Standards related to BEVs (Maghfiroh et al., 2021). Adoption, however, lags ambition: against the National Energy Council's target of 13 million two-wheeled and 2 million four-wheeled BEVs by 2030, only 109,576 two-wheeled and 23,348 four-wheeled BEVs had been registered by September 2024—about 1% of the target (Adzhani et al., 2025). Domestic EV sales held a market share of only 1.7% in 2023, constrained by EV prices and limited charging stations (Oehler-Şincai, 2024), and of a vehicle population of more than 164 million, public interest in adopting EVs remains limited with only 322,325 EVs, with major barriers including limited charging infrastructure, high upfront costs, and low public awareness (Fathoni et al., 2025). Literature mapping the EV ecosystem identifies China, South Korea, and Japan as the principal cooperation partners and situates Indonesia's EV push within national interest theory (Humayro & Virgianita, 2024), while studies of Hyundai's investment decision apply push–pull analysis to explain why Korea's largest automaker chose Indonesia despite the country's lack of EV facilities and technology (Ismail, 2021).

The gap across these clusters is clear: the BRI-statism literature explains why Chinese capital flowed in; the nickel literature explains what downstreaming achieved and cost; the foreign policy literature explains Indonesia's general hedging; and the EV governance literature explains domestic regulation. What is missing is an integrated analysis of how Indonesia's foreign policy agency operates specifically within the EV sector's asymmetric dependency structure—the task of this article.

THEORETICAL FRAMEWORK

Middle power theory frames Indonesia as a rising middle power that uses multilateral engagement, niche diplomacy, and norm entrepreneurship to compensate for asymmetric bilateral power differentials. A middle power is classically defined as a state that is "neither great nor small in terms of their power, capacity and influence and exhibits the capability to create cohesion and obstruction toward global order and governance" (Jordaan, 2003, as analyzed in (Karim, 2018)). The concept has been refined across three main strands—hierarchical or positional, behavioral, and identity approaches—with the behavioral strand emphasizing that middle powers direct their limited resources into specific areas best able to generate returns, a logic formalized in the literature on niche diplomacy (Teo, 2022). In the Indonesian case, the basic assumption is that Indonesia stays between the powerful and weaker actors: due to its limited economic and military capabilities, it is not strong enough to control the external environment, yet it is not merely the object of the big players' influence

and interest; through constructive diplomatic roles and multilateral diplomacy, Indonesia is expected to climb toward international actorship (Wicaksana & Karim, 2023). Beeson and Lee note that Indonesia is increasingly described as a significant regional middle power and has been experimenting with aspects of middle power diplomacy, even if it does not always use the term widely (Beeson & Lee, 2015). Indonesia's middle power diplomacy is also marked by an ambivalence between pragmatism and cosmopolitanism, signalling an awareness of its structural limitations in the international arena as a middle power from the Global South (Nandyatama et al., 2025). This framework predicts that Indonesia will compensate for its asymmetry with China not through balancing or bandwagoning alone, but through multilateral role performance—precisely the pattern examined in Section 6.3.

In addition, the strategic autonomy framework analyses the degree to which Indonesia retains meaningful policy independence in its economic and diplomatic choices despite structural dependency pressures. In the BRI context, scholarship has explicitly asked which economic and diplomatic activities constitute the BRI in the case of Indonesia and focused on Indonesia's efforts to maintain strategic autonomy and on manifestations of great-power influence on the country's foreign policymaking (Putten & Petkova, 2025). The question of whether deepening financial relations with Chinese actors enhances China's leverage over Indonesian foreign policymaking is central to assessments of the Jakarta–Bandung HSR and, by extension, to the EV supply chain (Schneider, 2021). Empirically, Indonesian strategy in the Indo-Pacific has been found to preserve national interests and strategic flexibility through hedging that avoids formal alignment, reflecting both the evolving power structure and Indonesia's normative foreign policy foundations (Nasution & Dermawan, 2026). Strategic autonomy here is treated as a variable rather than a constant: it is the outcome of continuous contestation between structural dependency pressures—capital concentration, technology gating, market offtake—and Indonesia's counterstrategies.

Other theory is two-level game theory examines how Indonesian domestic political constraints interact with international EV cooperation negotiations. At Level II, Indonesia's domestic politics feature electoral cycles, nationalist industrial policy, and environmental governance pressures. The domestic adoption deficit—only about 1% of the 2030 BEV target achieved by September 2024 (Adzhani et al., 2025)—creates pressure on governments to demonstrate delivery through visible industrial wins, such as battery plants and assembly facilities. Simultaneously, the environmental and social costs of nickel exploitation (Fan & Yuliatiningtyas, 2025; Nugraha & Hermawan, 2024) generate countervailing domestic constraints. At Level I, negotiations with Chinese investors occur against the background of Indonesia's commitment to the Paris Agreement (32% emissions reduction by 2030; net-zero by 2060) and its renewable energy targets of 23% by 2025, up from 9% in 2020 (Nugraha & Hermawan, 2024). The theory illuminates why Indonesia simultaneously welcomes Chinese capital and imposes local content requirements: the TKDN mandate (Adzhani et al., 2025) is simultaneously a Level I bargaining instrument and a Level II legitimacy device for nationalist constituencies.

These three frameworks converge to explain how Indonesia simultaneously welcomes Chinese capital while deploying strategic instruments—resource nationalism, WTO engagement, and partner diversification—to preserve national agency.

Research Method

This study employs a qualitative single-country case study methodology with comparative reference to Malaysia's parallel EV policy under the BRI (Tritto, 2025). The comparative dimension is analytically valuable because the Indonesia–Malaysia pair represents two distinct responses to BRI-era Chinese capital—Indonesian statist industrial policy versus Malaysian hybrid state–private coordination—within the same sector and regional context (Tritto, 2025), and because Malaysia's experience demonstrates that weaker states can still shape outcomes with a rising China under specific conditions (Liu & Lim, 2018).

Data sources comprise four categories: Primary documents: Indonesian Presidential Decrees (including Presidential Regulation No. 55/2019 (Nuarta & Sukedi, 2024) and Presidential Regulation 79 of 2023 (Gugat et al., 2025)), ministerial regulations (Maghfiroh et al., 2021), and investment roadmaps. Elite discourse analysis: speeches and official statements by President Prabowo and cabinet officials, read against the documented trajectory of Prabowo's foreign policy orientation (Setiawan, 2025; Yadav, 2025). Comparative

document analysis: Indonesian versus Malaysian EV industrial policy responses to Chinese BRI investment (Tritto, 2025). Secondary data: peer-reviewed journals, WTO dispute documentation (Jason et al., 2024; Mernissi et al., 2024), and studies of Chinese FDI in Indonesia (Pramono et al., 2021).

Data are analyzed using interpretive policy analysis to identify how strategic autonomy is discursively constructed and operationally practiced in Indonesian EV governance. The interpretive approach is appropriate because the key empirical phenomenon—whether non-alignment rhetoric survives structural penetration by Chinese capital—is itself a matter of discourse and practice, and because Indonesian foreign policy doctrine has always operated through self-identity and principled language (Wnukowski, 2015).

RESULTS AND DISCUSSION

The Free and Active Doctrine Under Pressure

Indonesia's traditional free and active (*bebas dan aktif*) non-alignment posture has been operationally tested by the depth of Chinese capital penetration in its EV ecosystem. The doctrine's historical logic was to keep Indonesia at a distance from external powers and to prevent them from interfering in Southeast Asian issues (Wnukowski, 2015). The EV partnership inverts this logic by design: Indonesia's downstreaming strategy sought deep penetration by Chinese capital as its central mechanism. Chinese companies lead the industry among the five largest nickel smelters (Korinek & De, 2023), the USD 30 billion processing and smelting build-out is mostly Chinese-financed (Rivota & Wardhana, 2026), and Chinese FDI between 2015 and 2020 concentrated precisely in the metal (42%), transportation (20%), and electricity (19%) sectors that constitute the EV supply chain (Pramono et al., 2021). The structural reality of concentrated Chinese ownership increasingly strains formal non-alignment rhetoric.

The doctrine has, however, evolved mechanisms for managing precisely this tension. Anwar's "hedging plus" formulation captures the pattern: Indonesia engages all sides to maximize benefits while mitigating risks, ensuring strategic autonomy and agency, while playing a leading role in promoting ASEAN-centric inclusive multilateralism (Anwar, 2022). Recent analysis confirms that Indonesia does not align rigidly with either the United States or China, instead adopting a hedging strategy that maintains constructive relations with both powers while avoiding formal alignment (Nasution & Dermawan, 2026). Economic diplomacy studies find the same duality: soft balancing toward both China and the United States through cooperation with Quad nations, combined with economic bandwagoning through attracting investments and participating in the BRI (Hapsari et al., 2026). Applied to the EV sector, this means Prabowo's attendance at Chinese-backed EV groundbreakings signals pragmatic accommodation, while simultaneous overtures toward the US and EU signal strategic hedging. Prabowo's documented trajectory supports this reading: a more assertive and hands-on foreign policy that nevertheless adheres to the foundational "free and active" doctrine, blending nationalist rhetoric with pragmatic engagement (Setiawan, 2025), with priorities including strengthening Indonesia's position within ASEAN, carefully balancing relations with major powers like the US and China, and elevating Indonesia's role as an influential middle power (Setiawan, 2025).

The comparative Malaysian case demonstrates that such doctrine-under-pressure is not fatal to agency. Malaysia, despite being a relatively weak and small state, proved adept at engaging a rising China to advance key projects and further its own agenda, with outcomes dependent on three conditions: fulfilment of Malaysia's longstanding domestic policy priorities, a mutual vision between state and federal authorities, and advancement of geopolitical interests for both Malaysia and China (Liu & Lim, 2018). Malaysia's EV-specific response—directing investments toward green energy and smart manufacturing, which resulted in the brokerage of a pivotal car manufacturing joint venture—illustrates hybrid state-private coordination as an alternative to Indonesian statism (Tritto, 2025). Indonesia's own experience with the Jakarta-Bandung HSR, however, cautions that statist arrangements carry vulnerabilities: inefficient resource allocation, incumbency bias, and the intertwining of Chinese state-owned enterprises' profit-seeking with geopolitical goals (Liu & Lim, 2022). The same vulnerabilities are transferable to the EV chain, where the dual agenda of Chinese SOEs is even more pronounced because battery materials sit closer to strategic chokepoints than railway rolling stock.

The theoretical implication is that the free and active doctrine functions under pressure not as a description of Indonesia's economic structure but as a discursive resource that legitimizes counterstrategies. Its operational content has shifted from avoiding blocs (Hatta's two reefs (Wnukowski, 2015)) to managing asymmetric interdependence within them.

Economic Diplomacy Tools: Effectiveness and Limits

Indonesia's nickel export ban has been the central instrument of its economic diplomacy in the EV sector, and its effectiveness as a bargaining tool is demonstrated by the investment response: the ban increased downstream processing because Indonesia's exceptional resource endowment provided strong incentives for investment, mostly from Chinese companies (Korinek & De, 2023). Production of processed nickel products surged from 24,000 metric tons in 2014 to 636,000 metric tons in 2020 (Korinek & De, 2023), and Indonesia became the world's largest refined nickel producer, attracting over USD 30 billion in processing and smelting facilities, mostly from China-based companies (Rivota & Wardhana, 2026). Compared with the DRC, which retains dominance in cobalt extraction but has been unable to move past challenges including weak governance and insufficient electricity and technological capacities, only Indonesia has been able to move into the higher value portions of the value chain (Burger, 2026). The ban thus succeeded in converting a resource endowment into industrial structure.

Yet the strategy has three structural limits

First, concentration risk. The very effectiveness of the ban deepened reliance on Chinese companies in global battery supply chains (Rivota & Wardhana, 2026). Chinese FDI's sectoral concentration in the metal industry (42%) means Indonesia's most strategic industrial tier is now substantially Chinese-owned (Pramono et al., 2021), and the econometric evidence of persistent asymmetric interdependence and structural exposure to external shocks (Maulida & Aji, 2025) indicates that Indonesia's EV-linked exports remain structurally hostage to Chinese demand and tariff policy. This is the classic dilemma of resource nationalism: the leverage that attracts capital also binds the state to the capital's origin.

Second, legal exposure. The export ban provoked a complaint from the European Union asserting that the policy contravenes the GATT, the SCM Agreement, and CEPA by restricting access to essential raw materials (Rahmawati & Swara, 2025). The WTO dispute settlement panel declared that Indonesia's policy of export bans and mandatory processing of nickel minerals violated Article XI.1 of the GATT 1994; Indonesia appealed the decision and remains committed to the nickel ore export ban (Jason et al., 2024). In case number DS592 of 2022, the panel decided Indonesia had violated Article XI:1 GATT 1994 and that the policy could not be justified by Articles XI:2(a) and XX; Indonesia appealed the WTO Panel Report (Mernissi et al., 2024). The dispute illustrates the contradictions of resource nationalism in a rules-based global trade order: Indonesia lost at the panel level, appealed in 2022, and despite legal and diplomatic challenges, downstreaming remains a key strategy to enhance Indonesia's economy (Christwan & Kusnowibowo, 2024). Scholars have proposed defensive avenues including the Principles of Permanent Sovereignty over Natural Resources, Special and Different Treatment, and connecting the policy to the Net Zero Emission mission (Mernissi et al., 2024), but the episode demonstrates that commodity-based leverage operates within—and is constrained by—an international legal architecture Indonesia did not design.

Third, market volatility. The fall in Chinese nickel demand—reported at –20% from February 2023 to November 2024 in Lowy Institute analysis—exposes the limits of commodity-based leverage: leverage derived from holding a resource is only as strong as the buyer's demand for it. When the dominant buyer's demand contracts, the bargaining asymmetry reverses, and a state that has restructured its entire export economy around downstream supply to that buyer absorbs the shock. Indonesia's own policy literature recognizes this, highlighting the need for policies that deepen domestic value chains, strengthen export-oriented FDI, and reduce concentration risk toward China (Maulida & Aji, 2025).

Fourth, and intersecting with all three, the adoption paradox. Downstreaming has industrialized supply but not created demand: domestic EV sales held only a 1.7% market share in 2023 (Oehler-Şincai, 2024), only 322,325 EVs operate within a vehicle population of more than 164 million (Fathoni et al., 2025), and

registration reached only about 1% of the 2030 BEV target by September 2024 (Adzhani et al., 2025). The intended domestic offtake for Indonesian battery production therefore remains thin, which increases Indonesia's dependence on export markets—chiefly China itself—for the output of the industrial base it built with Chinese capital. Two-level game logic applies domestic constituencies demand visible industrial wins, but the same constituencies' purchasing behavior has not yet validated the industrial strategy, forcing the government back into external markets and thus reinforcing the asymmetry it seeks to escape.

The overall assessment is that economic diplomacy has been moderately effective: it attracted transformative investment and built real industrial capability, but it has not converted industrial capability into bargaining power proportionate to China's structural position across the chain.

Instrumental Multilateralism as a Balancing Strategy

The article's central theoretical contribution is the concept of instrumental multilateralism: the deliberate use of international platforms not primarily for their substantive governance functions but as diplomatic buffers that generate alternative sources of legitimacy, bargaining power, and exit options against bilateral pressure from a dominant economic partner. Indonesia's behavior across the G20, ASEAN, and BRICS+ exhibits this pattern.

Indonesia's middle power diplomacy has long been multilateral in character: Jakarta carries out middle-power diplomacy by playing a leading role in promoting ASEAN-centric inclusive and cooperative wider East Asian multilateralism, helping to shape both the institutional and normative pillars of the international order in the Indo-Pacific (Anwar, 2022). The behavioral logic of niche diplomacy directs limited resources into forums where the state can wield the most influence depending on its resources and reputation (Teo, 2022). Under Prabowo, the multilateral portfolio has widened: the administration has actively pursued joining BRICS, strengthening maritime security in the Indo-Pacific, and expanding military cooperation with major global powers (Yadav, 2025).

The BRICS accession is the clearest case. President Prabowo's decision to pursue full membership in BRICS marks a strategic departure from the cautious stance of former President Joko Widodo, who in 2023 hesitated over concerns that such a move might compromise the Free and Active foreign policy (Nugraha et al., 2025). Role-theoretic analysis argues that Indonesia's bid reflects a strategic effort to assert its role as an independent "Bridge Builder" and "Voice for the Global South," while highlighting a fundamental tension in which those roles risk becoming unsustainable if perceived as favoring one side (Nugraha et al., 2025). Hedging-framework analysis finds that accession opens strategic opportunities in South–South economic cooperation, access to alternative development financing, and enhanced geopolitical influence, while presenting diplomatic risks such as potential Western pressure and internal dominance within BRICS by major powers; Indonesia adopts a calculated hedging strategy that balances bilateral ties and multilateral engagement to maintain strategic autonomy (Darwis & Setiawan, 2025). Complementary analysis emphasizes motivations to diversify economic partnerships, attract foreign investment, and reduce dependency on Western-led institutions, while noting risks of strategic entanglement in rivalries among China, Russia, and India (Putra et al., 2025). Indonesia's inclusive approach also spans OECD membership pursuit: BRICS membership enhances Indonesia's bargaining power to pursue OECD membership while maintaining cooperative relationships with the United States and its allies, with Indonesia's *bebas aktif* doctrine acting as a pivotal influence on ASEAN's inclusivity principles under the ASEAN Outlook on the Indo-Pacific (JUNED & SARIPUDIN, 2025).

By positioning itself as a pivotal Global South actor in UN, G20, and BRICS platforms, Jakarta creates alternative sources of international legitimacy that reduce its dependence on Chinese diplomatic support. The mechanism is straightforward: a state that can obtain financing attention, diplomatic recognition, and agenda-setting influence across multiple platforms cannot be isolated by any single partner. This is precisely the function instrumental multilateralism performs in asymmetric bilateral relationships—and it is consistent with the finding that Indonesia's dual approach of soft balancing and economic bandwagoning allows it to maintain strategic autonomy while leveraging benefits from both competing powers (Hapsari et al., 2026), and with Indonesia's demonstrated capacity to avoid entrapment in great-power rivalry through balanced engagement and caution (Nasution & Dermawan, 2026).

ASEAN centrality plays a distinct buffering role. By advocating ASEAN centrality, Indonesia works to prevent member states from aligning exclusively with rival powers, thereby safeguarding regional stability and protecting its national interests, while engaging global institutions such as the UN, WTO, G20, and BRICS (MAHASETH & ZAINAB, 2025). Applied to the EV sector, ASEAN provides a regional market framework within which Indonesian EV production can find offtake beyond China, partially countering the adoption paradox identified above. The comparative lesson from Malaysia reinforces the point: Malaysia's brokerage of a pivotal car manufacturing joint venture through hybrid coordination (Tritto, 2025) shows that regional peers are simultaneously competitors and potential partners in diversifying the chain.

Instrumental multilateralism thus answers the article's first research question: the free and active doctrine shapes Indonesia's strategic choices within the EV cooperation framework primarily by mandating multilateralism as the compensatory mechanism for bilateral asymmetry. The doctrine does not prevent deep cooperation with China—Jakarta has never treated non-alignment as economic autarky—but it channels the management of that cooperation through platforms where Indonesia's middle power capabilities are maximized (Teo, 2022; Wicaksana & Karim, 2023).

Toward EV Partnership Diversification

Indonesia has attracted parallel EV investments as partial diversification measures. The vehicle assembly tier shows the greatest diversification: alongside China's BYD (USD 1.3 billion, 150,000 units yearly, operational January 2026) and Wuling (120,000 units yearly, USD 0.7 billion), South Korea's Hyundai operates with a capacity of 250,000 units per year (Oehler-Şincal, 2024). Hyundai's investment decision has been analyzed through push-pull factors explaining why Korea's largest automaker expanded into Indonesia despite the country's lack of EV facilities and technology (Ismail, 2021), and Indonesia's cooperation with Hyundai in developing the electric car battery industry is expected to position Indonesia as the leading EV battery producer in ASEAN (Budiono & Virgianita, 2024). Most significantly, in July 2024 Indonesia inaugurated the region's first EV battery manufacturing plant, a joint venture between Hyundai Motor and LG Energy Solution from South Korea, with a total investment of USD 1.1 billion located in West Java (Oehler-Şincal, 2024)—part of LG Energy Solution's US\$9.8 billion commitment identified in the Indonesian battery literature (Radhica, 2023). Earlier commitments from CATL (US\$5.2 billion), Foxconn (US\$8 billion), and British Volt (US\$2 billion) (Radhica, 2023) further indicate multi-sourced capital at the materials and cell tiers, and policy analyses have argued that Indonesia should ensure more sizeable investment in lithium-ion battery production to complete a whole downstream supply chain, including the synthesis of the remaining high-quality battery materials, in building a regional EV battery chain hub (Konewka et al., 2021).

The distribution of this diversification across the value chain, however, is uneven—and analytically decisive. Diversification has been effective at the vehicle assembly tier, where Korean, and additional Chinese-private, capital operates alongside Chinese state-linked assemblers. But the dominance of Chinese capital in the battery materials tier remains structurally unchallenged: four of the five largest smelters are Chinese (Korinek & De, 2023), the USD 30 billion smelting build-out is mostly China-based (Rivota & Wardhana, 2026), and reliance on Chinese companies in battery supply chains has increased through the downstreaming process (Rivota & Wardhana, 2026). Even the flagship Hyundai-LG battery plant, while Korean, sits within a materials ecosystem whose upstream refining capacity is overwhelmingly Chinese-financed. Diversification at the assembly tier without diversification at the battery cell and precursor tiers therefore delivers reputational and assembly-stage hedging but not strategic autonomy at the tier where technology, process knowledge, and margin concentrate.

The Malaysia comparison sharpens this conclusion. Malaysia directed BRI-era investments toward green energy and smart manufacturing, brokering a pivotal car manufacturing joint venture through hybrid state-private coordination (Tritto, 2025)—a strategy that produced a different risk profile than Indonesia's statist accumulation of Chinese-controlled smelting capacity. Malaysia's broader BRI experience also demonstrates that outcomes with a rising China depend on domestic political conditions the host state controls (Liu & Lim, 2018), suggesting Indonesia's diversification bottleneck is a policy choice rather than a structural fate.

The two-level game perspective completes the picture. Domestic constraints—TKDN mandates (Adzhani et al., 2025), the regulatory gap between Presidential Regulation 79 of 2023 and Law 22 of 2009 concerning road traffic, which remains oriented toward fossil fuel vehicles and creates deficiencies in type tests, safety standards, and battery waste management (Gugat et al., 2025)—shape the attractiveness of Indonesia to non-Chinese investors. Regulatory harmonization is necessary so that electric vehicles can operate legally, safely, and sustainably (Gugat et al., 2025), and inconsistent implementation of fiscal and non-fiscal incentives such as subsidies and tax exemptions has been identified as a barrier to EV adoption (Fathoni et al., 2025). Every regulatory inconsistency raises the transaction cost for non-Chinese investors who lack the state-linked financing channels and political risk tolerance of Chinese SOEs, thereby reproducing the concentration the diversification policy seeks to escape.

POLICY IMPLICATIONS AND RECOMMENDATIONS

The analysis yields four policy directions for strengthening Indonesia's bargaining position and avoiding asymmetric dependency.

First, technology transfer conditionality at the battery materials and cell tier. Since diversification at the assembly tier does not substitute for control at the cell and precursor tier, Indonesia should concentrate its bargaining leverage—its irreplaceable resource endowment, which will be the source of almost all growth in refined nickel supply for EV batteries over the next decade (Korinek & De, 2023)—on extracting deeper technology transfer, local R&D obligations, and human capital development from incumbents in that tier. The paradox identified in the China–Indonesia new energy partnership—opportunities undermined by environmental degradation, governance gaps, resource nationalism, and social conflicts (Fan & Yuliatiningtyas, 2025)—indicates that conditionality should extend to environmental and social governance standards, both to improve partnership durability and to make Indonesian nickel compliant with the due diligence requirements of non-Chinese markets.

Second, domestic demand activation. The adoption deficit (1.7% market share in 2023 (Oehler-Şincai, 2024); about 1% of the 2030 BEV target by September 2024 (Adzhani et al., 2025); 322,325 EVs against a 164-million vehicle population (Fathoni et al., 2025)) undermines Indonesia's market-power lever. Addressing the barriers identified in the literature—limited charging infrastructure, high upfront costs, low public awareness, and inconsistent incentive implementation (Fathoni et al., 2025)—and closing the regulatory gap with Law 22 of 2009 (Gugat et al., 2025) would create the domestic offtake that converts Indonesia from a supplier into a market, directly strengthening Level I bargaining in two-level game terms.

Third, consolidation of instrumental multilateralism. The BRICS accession under Prabowo, alongside ASEAN centrality and OECD pursuit, should be managed to maximize exit options without triggering the role conflict identified in the literature—the risk of becoming unsustainable if Indonesia's bridge-builder role is perceived as favoring one side (Nugraha et al., 2025). The hedging risks of BRICS, including Western pressure and internal dominance by major powers (Darwis & Setiawan, 2025), and the entanglement risks of China–Russia–India rivalries (Putra et al., 2025), mean instrumental multilateralism must remain genuinely multi-platform rather than shifting Indonesia's dependence from one pole to another. The inclusive approach linking ASEAN, BRICS, and OECD (Juned & Saripudin, 2025) is the correct template.

Fourth, legal-strategic preparation for trade defence. Given the WTO panel ruling against the export ban under Article XI.1 GATT 1994 and Indonesia's appeal (Jason et al., 2024; Mernissi et al., 2024), Indonesia should diversify its legal toolkit: pursuing the defenses proposed in the literature—Permanent Sovereignty over Natural Resources, Special and Different Treatment, and linkage to the Net Zero Emission mission (Mernissi et al., 2024)—while refining down streaming through strengthening domestic industrial capacity and harmonizing regulations with international standards (Christwan & Kusnowibowo, 2024).

CONCLUSION

Indonesia's strategic autonomy in the China–Indonesia EV cooperation framework is real but constrained. Jakarta has successfully used nickel downstreaming policy to attract transformative Chinese investment—

over USD 30 billion in processing and smelting facilities, mostly from China-based companies within a broader pattern of Chinese FDI exceeding US\$17 billion between 2015 and 2020 and concentrated in the EV-relevant metal, transportation, and electricity sectors—and to accelerate EV industrial development toward its 2030 targets. The free and active doctrine has proven adaptive rather than obsolete: recast as hedging plus and operationalized through economic diplomacy that combines soft balancing with bandwagoning, it has allowed Indonesia to welcome Chinese capital while avoiding formal and while building alternative platforms of legitimacy through BRICS, ASEAN, and the G20.

However, the concentration of Chinese capital, technology, and market offtake across the supply chain creates structural vulnerabilities that formal non-alignment rhetoric cannot resolve. Four of the five largest smelters are Chinese; reliance on Chinese companies in battery supply chains has increased through the down streaming process; and econometric evidence confirms persistent asymmetric interdependence and structural exposure to external shocks. The WTO defeat at panel level over the export ban and the contraction of Chinese nickel demand together demonstrate that commodity-based leverage is bounded by legal architecture and market volatility alike. Diversification, meanwhile, has succeeded at the vehicle assembly tier—Hyundai, BYD, Wuling, and the Hyundai–LG battery joint venture—but not at the strategically critical battery cell and precursor tier, where Chinese state-linked capital remains dominant.

Indonesia must therefore develop a comprehensive EV strategic autonomy doctrine—combining technology transfer conditionality at the battery tier, domestic innovation and demand investment, multi-platform multilateral engagement, and transparent investment governance—to ensure that China's EV partnership delivers genuine industrial sovereignty rather than sophisticated dependency. The concept of instrumental multilateralism developed in this article offers a theoretical vocabulary for that doctrine: in asymmetric relationships between middle powers and dominant economic partners, agency is preserved not by resisting interdependence but by building the multilateral architecture that keeps any single partner replaceable.

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