



FMSO's Military DIME (M-DIME) Research Project

Tracking Russian and Chinese military influence in states around the world

Instruments of Chinese Military Influence in Indonesia

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OVERVIEW OF FMSO'S M-DIME RESEARCH PROJECT

The Military DIME (M-DIME) Research Project is a dynamic effort from researchers at the U.S. Army Training and Doctrine Command's Foreign Military Studies Office (FMSO). Its goal is to provide Army leaders with a clear, comparative understanding of how China and Russia employ instruments of national power to obtain military influence around the world. The M-DIME framework is derived from the "DIME" concept, which classes instruments of national power into four types: Diplomatic, Informational, Military, and Economic. Based on this concept, the M-DIME framework gives more narrow attention to the instruments that China and Russia employ to gain military influence in third-party countries.

The M-DIME framework's purpose is to track and analyze the military influence of "Benefactor" countries (i.e. China and Russia) in select "Recipient" countries in Africa, Latin America, the Middle East, and South and Southeast Asia. Benefactor countries are assumed to engage in activities that result in them having increased military influence in Recipient countries to gain leverage over global rivals, competitors, and adversaries; for China and Russia, this means the United States. Within this framework, "military influence" is defined as the ability of a Benefactor country to shape or alter the attitudes, behaviors, and capabilities of actors within—and entities associated with—the armed forces of Recipient countries.

The M-DIME framework identifies 12 distinct instruments of national power employed by Benefactor countries to gain military influence in Recipient countries, three for each of the DIME categories. They are as follows:

DIPLOMATIC INSTRUMENTS

- D1 Defense-Related Diplomacy
- D2 International Military Education and Training
- D3 Soft Power Activities

INFORMATIONAL INSTRUMENTS

- I1 Cultural and Media Outreach, Collaboration, and Alignment
- I2 Information and Communications Technology (ICT) Support
- I3 Cooperation in Military Intelligence and Communications

MILITARY INSTRUMENTS

- M1 Formal Bilateral Military Engagements
- M2 Shared Informal/Multilateral Military Engagements
- M3 Defense/Security Pacts and Agreements

ECONOMIC INSTRUMENTS

- E1 Arms Transfers
- E2 Technology-Sharing and Joint Production Agreements
- E3 Trade and Cooperation in Strategic Commodities/Sectors

M-DIME analysis is based on qualitative assessments of Benefactor influence in Recipient countries along each of the 12 M-DIME instruments of influence. These assessments are made for the Benefactor's **Current Influence** (assessed as Very High, High, Medium, Low, Very Low, or Unobserved) and **Projected Influence** (assessed as Increasing, Steady, Decreasing, or Unknown). Current assessments are made based on activities from 2012 to the present, while future assessments are three-year forecasts.

The bulk of activities considered in the M-DIME Research Project involve members of the armed forces or defense sector personnel in both Benefactor and Recipient countries. Such activities include formal and informal military-to-military diplomacy, security cooperation engagements, and arms transfers. However, the M-DIME Research Project also tracks and analyzes Chinese and Russian activities that employ non-military instruments of influence but ultimately bear on the decisionmaking and capabilities of the Recipient country's armed forces. Such activities include Chinese and Russian collaboration with Benefactor states in media, communications technology, and strategic sectors.

The M-DIME Research Project's findings are derived from open-source research. Each M-DIME product is produced with the collaboration of analysts from across FMSO, frequently with the assistance of non-Department of Defense subject matter experts coming from academia, think tanks, and the private sector. Given its basis in open-source research, the M-DIME Research Project has an inherent limitation. It cannot track Chinese and Russian military influence activities that are deliberately kept secret. Consequently, assessments of Chinese and Russian influence based on instruments for which secrecy is important or where information would typically be classified by the Benefactor or Recipient countries—for instance, military-technology sharing or intelligence collaboration—are acknowledged to be made with low confidence. Assessments of

Projected Influence, unless otherwise stated, are also made with low confidence given pervasive information gaps and the potential for bilateral dynamics to quickly shift. In certain cases, assessments are not made where open-source data is considered inconclusive

In sum, the M-DIME Research Project is a tool for U.S. Army and U.S. Government personnel to better understand the instruments of national power employed by China and Russia to gain global military influence and the impact these activities have on U.S. national security interests. Over time, FMSO will expand the body of research and assessments based on this framework, increasing its comparative value across Benefactor and Recipient countries.

KEY ASSESSMENTS















DIPLOMATIC / INFORMATION			MILITARY / ECONOMIC					
	D1	Defense-Related Diplomacy	     	M1	Formal Bilateral Military Engagements			
	D2	International Military Education and Training		M2	Shared Informal/Multilateral Military Engagements			
	D3	Soft Power Activities		M3	Defense/Security Pacts and Agreements			
	I1	Cultural/Media Outreach, Collaboration, Alignment		E1	Arms Transfers			
	I2	Information/Communications Technology Support		E2	Technology-Sharing, Joint Production Agreements			
	I3	Cooperation in Military Intelligence/Communications		E3	Trade/Cooperation in Strategic Commodities/Sectors			
CURRENT DEGREE OF INFLUENCE				PROJECTED FUTURE DEGREE OF INFLUENCE				
Very High	High	Medium	Low	Very Low	None/Unobserved	Increasing 	Steady 	Decreasing 

Figure 1. M-DIME Overview

China's current M-DIME influence in Indonesia is assessed as Low. Some of the most important instruments contributing to China's current military influence in Indonesia include:

- Defense-Related Diplomacy (D1).** Chinese heads of state, as well as defense and diplomatic officials, have frequently engaged with their Indonesian counterparts through bilateral diplomatic engagements. A highly developed diplomatic relationship provides a platform for China to exercise and build its military influence in Indonesia.
- Trade and Cooperation in Strategic Commodities/Sectors (E3).** China gains significant economic power from being Indonesia's largest trading partner, with large investments in its energy, infrastructure, and mining industries.

China's projected M-DIME influence in Indonesia is assessed as Steady. Some of the most dynamic instruments informing China's projected military influence in Indonesia include:

- Cultural and Media Outreach, Collaboration, and Alignment (I1).** China's currently low-level use of this instrument is projected to increase thanks to recently signed bilateral media collaboration agreements. China is likely to use this instrument to soften historical animosity and combat negative perceptions toward ethnic Chinese Indonesians.
- Information and Communications Technology (ICT) Sector Support (I2).** Chinese companies in Indonesia's ICT sectors have established strong roots and hold opportunities for further growth, with Indonesia looking to collaborate with China on artificial intelligence (AI). Indonesia's growth prospects and the size of its market provide an ideal target for Chinese companies to further grow and develop their products.
- Trade and Cooperation in Strategic Commodities/Sectors (E3).** China's cooperation in Indonesia's strategic sectors is expected to grow with continued investment through new projects and growing market share, further increasing China's already substantial economic power in Indonesia.

INDONESIA AT A GLANCE	
Capital	Jakarta ^{1, a}
Population	281,562,465 (2023 Estimate) ²
GDP per Capita	\$12,400 (2022 Estimate) ³
Head of Government	Prabowo Subianto ⁴
Head of State	Prabowo Subianto ⁵
Minister of Defense	Sjafrie Sjamsoeddin ⁶
Chief of General Staff	Agus Subiyanto ⁷
Military Expenditure (total)	\$9.384 Billion (2022 Estimate) ⁸
Military Expenditure (% of GDP)	0.7% (2023 Estimate) ⁹
Armed Service Branches	Army (TNI-Angkatan Darat, or TNI-AD) Navy (TNI-Angkatan Laut, or TNI-AL); includes Marine Corps (Korps Marinir, or KorMar) Air Force (TNI-Angkatan Udara, or TNI-AU) ¹⁰
Active Armed Forces Personnel	Approximately 400,000 active-duty troops (300,000 Army; 60,000 Navy, including about 20,000 marines; 30,000 Air Force) (2023) ¹¹

a In 2022, the construction of a new capital called Nusantara was announced. It is expected to be completed by 2045.

Figure 2. Indonesia at a Glance.

INTRODUCTION TO CHINA-INDONESIA RELATIONS

China and Indonesia have navigated significant volatility in their relationship, shaped by latent ethnic tensions and changes in Indonesian domestic politics. Indonesia became the first Southeast Asian nation to establish diplomatic relations with China in July 1950, shortly after its independence from the Netherlands.¹² Under President Sukarno, Indonesia's founding leader and first president, the country fostered enhanced economic and cultural exchanges through shared anti-imperialist goals.^{13, 14} However, friction arose from riots against Indonesia's ethnic Chinese diaspora and China's support for the Communist Party of Indonesia (PKI).^{15, 16} Tensions dramatically escalated after a failed 1965 coup, attributed to the PKI. The military, led by General Suharto, launched a violent crackdown on communists and ethnic Chinese, leading to the suspension of diplomatic

relations with China in 1967.^{17, 18} Suharto seized power that year, establishing a decades-long authoritarian regime. For the remainder of the Cold War, Indonesia, under Suharto, aligned itself primarily with the West. Though official ties with China resumed in 1990, ethnic tensions lingered.¹⁹ The collapse of the Suharto regime in 1998 ushered in an era of improved relations.²⁰ Post-Suharto administrations have supported engagement, emphasizing cultural exchange and economic cooperation.²¹ These initiatives led to a China-Indonesia strategic partnership in 2005, covering trade, disaster relief, and maritime issues.²² Despite China's significant economic influence today, military cooperation remains constrained by disputes over maritime claims near Indonesia's Natuna Islands and lingering skepticism within Indonesia's military regarding communist influence.^{23, 24}

U.S. policy has emphasized the importance of the Association of Southeast Asian Nations (ASEAN), of which Indonesia is a member, as essential in ensuring a free and open Indo-Pacific.^{25, 26} The United States has enhanced the potential for economic, cultural, and defense collaboration after elevating its relationship with Indonesia to a Comprehensive Strategic Partnership in November 2023 and later signing a Defense Cooperation Agreement, formalizing broad and deep bilateral engagement.^{27, 28} The U.S. military relationship with Indonesia is robust, featuring significant arms transfers (such as F-15 fighter jets and Black Hawk helicopters),^{29, 30} the development of a joint maritime training center,³¹ and regular

joint military exercises.³² U.S. policy considers China as a competitor with the intent and capability to reshape the current international order.³³ Despite China's economic influence, its defense cooperation with Indonesia is limited and has not developed to a meaningful level.³⁴ To compete with China and maintain a free and open Indo-Pacific, the United States has an interest in continuing its military partnership with Indonesia and partnering over shared strategic interests, such as denying Chinese claims near the Natuna Islands, where Indonesia's exclusive economic zone overlaps with Beijing's expansive South China Sea assertions.^{35, 36}

D - Diplomatic Instruments

China's use of diplomatic instruments in Indonesia is extensive and significant. Bilateral meetings between heads of state and high-ranking defense officials are numerous, focusing on broad issues and areas of collaboration. China has utilized different activities to practice soft power in Indonesia, but maritime incidents near the Natuna Islands hamper these efforts. Participation in Chinese military programs and institutions by Indonesian personnel remains limited, but China has looked to host study trips for Indonesian military academies and has provided funding for Indonesian personnel to learn Mandarin.



D1: Defense-Related Diplomacy

Current Influence: High

Projected Influence: Steady

- ***Since 2012, Indonesian heads of state have frequently met with their Chinese counterparts, though discussions of security issues appear to be limited.***
 - » In 2012,^{37, 38} Indonesian President Susilo Bambang Yudhoyono met twice with his Chinese counterpart, Hu Jintao. In 2013, President Yudhoyono met with President Xi Jinping.³⁹
 - » In 2014,⁴⁰ 2015,^{41, 42} 2016,⁴³ 2017,⁴⁴ 2018,⁴⁵ 2019,⁴⁶ 2022,⁴⁷ and 2023,^{48, 49} Indonesian President Joko Widodo met with Xi. Additionally, in 2024,⁵⁰ the first state visit of President Prabowo Subianto was to China, where he met with Xi.
 - » Although the heads of state have met frequently, discussions are limited on security issues, with broad references being made on jointly promoting stability through collaborating on issues of defense, cyber security, and counterterrorism.^{51, 52}
- ***Chinese and Indonesian defense ministers have sought to expand on the bilateral 2013 Comprehensive Strategic Partnership and improve defense cooperation.***
 - » Chinese and Indonesian defense ministers have expressed hopes of building on the Comprehensive Strategic Partnership they established in 2013.⁵³
 - » Ministerial meetings have emphasized improving joint training, defense industrial cooperation, and ensuring regional security.^{54, 55}
- ***For over a decade, China and Indonesia have held annual meetings between defense officials to expand cooperation between their defense industries; however, details are limited.***
 - » Since 2012, China and Indonesia have held annual meetings involving high-ranking defense officials to focus on identifying areas of cooperation between their defense industries.
 - » These meetings are part of Indonesia's efforts to modernize its military and industrial base through technology transfers, joint development, and production.^{56, 57}

- **Chinese influence via this instrument is expected to remain steady over the next three years. Current president and former defense minister Subianto has stated he will continue close engagement with China.**
 - » In April 2024, as Defense Minister and President-Elect, Subianto visited Xi in Beijing and said he “fully supports the development of closer Indonesia-China relations and wishes to continue President Widodo’s policy of friendship with China,” viewing the country as an important partner in defense cooperation.⁵⁸



D2: International Military Education and Training Programs

Current Influence: Low

Projected Influence: Steady

- **There is limited open-source data on the number of Indonesian military personnel studying at Chinese institutions, but the available data indicates a small number of Indonesian personnel at Chinese military institutions and programs.**
 - » Since 2014, it is estimated that roughly 12 Indonesian military personnel have attended Chinese institutions and programs annually.⁵⁹
- **A long history of repressing the Mandarin language in Indonesia stifled language development among its military personnel, however, new courses, partly supported by China, have been established to reverse this trend.**
 - » Under President Suharto’s New Order era from 1966 to 1998, Chinese language and culture were curtailed, limiting language exchanges.^{60, 61}
 - » Indonesia has established intensive Mandarin courses for its military personnel,⁶² which have been supported by the Chinese Ministry of Defense through the provision of grants⁶³ and instructors.⁶⁴
- **Indonesian officers have participated in trips to China organized by the Indonesian Army Command and General Staff College to study its military systems and learn from Chinese officials.**
 - » In 2015, 50 Indonesian officers visited Beijing to engage with a Chinese defense company and military institutions, such as the National Defense University.⁶⁵
- **Chinese influence via this instrument is expected to remain steady over the next three years. Although bilateral meetings have referenced improving education and military training programs, there is no comprehensive data to show an increase in Indonesian personnel participating in Chinese military programs.**

D3: Soft Power Activities



Current Influence: Low

Projected Influence: Steady

- **Chinese defense companies have frequently attended a biennial Defense Expo hosted by Indonesia, but potential influence gains are likely diluted by the large number of countries represented in the expo.**
 - » Since 2004, the Indonesian Ministry of Defense has hosted the Indo Defense Expo & Forum, a

biennial event attended by representatives from dozens of countries focused on showcasing and selling defense technology.⁶⁶

» Chinese delegates have attended the expo in previous years.^{67, 68}

• ***Chinese naval ships and their personnel have visited and engaged with their Indonesian counterparts at port and provided humanitarian assistance to the local population.***

» In July 2018, a Chinese naval task force comprising three ships stopped at the Tanjung Priok Port in Jakarta for a technical stop; Chinese personnel visited the area to have a “better understanding of the local history and culture and ethnic customs.”⁶⁹

» In November 2022, a Chinese naval hospital ship visited Indonesia, carrying out diagnoses and treatments of diseases for hundreds of locals at Tanjung Priok.^{70, 71}

» In September 2023, the training ship Qi Jiguang conducted a three-day goodwill visit to Indonesia.⁷² Chinese sailors visited Indonesian naval academies and museums and engaged in exchanges and sporting activities with their Indonesian counterparts.⁷³

• ***Chinese naval ships assisted a salvage operation for an Indonesian submarine that sank in the Bali Sea, an event that drew significant domestic and international attention.***

» In 2021, the Indonesian submarine KRI Nanggala, sank during a live-fire exercise, resulting in the deaths of 53 crewmembers on board.⁷⁴

» The search operation drew significant attention with the hashtag “#KRINanggala402” as of April 2021, garnering 10.7 million tweets.⁷⁵

» In May 2021, China dispatched three naval ships to assist Indonesia with the salvage operation of the submarine.⁷⁶

• ***The overlap of China’s nine-dash line and Indonesia’s exclusive economic zone has created incidents between Indonesian naval vessels and the Chinese coast guard and fishing boats near the Natuna Islands.***

» Indonesia and China have agreed that there is no territorial dispute between them over the South China Sea.⁷⁷ However, there is an overlap between Indonesia’s exclusive economic zone and China’s nine-dash line, which Indonesia rejects.^{78, 79}

» The Indonesian Navy has frequently sent ships to monitor and confront Chinese Coast Guard vessels and fishing boats near the resource-rich Natuna Islands.^{80, 81}

• ***Chinese influence via this instrument is expected to remain steady over the next three years. Although China uses numerous tools to practice soft power on Indonesia’s security apparatus, disputes near the Natuna Islands curtail its efforts.***

I - Informational Instruments

China's use of informational instruments to gain military influence in Indonesia is multifaceted and growing. Chinese media outlets and officials have established a strong presence and relationships among Indonesian outlets. Although anti-Chinese and anti-Communist elements remain significant in Indonesia, public and elite opinion of China has improved and remains relatively high. Setbacks in space cooperation are overshadowed by the achievements of Chinese firms like Huawei and ZTE, which have established a significant presence in the Indonesian market and have closely collaborated with the Indonesian government.



I1: Cultural and Media Outreach, Collaboration, and Alignment

Current Influence: Low

Projected Influence: Increasing

- Chinese media groups have signed collaboration agreements with Indonesian media outlets and have purchased ad space to have their articles republished.***

- » In November 2023, Indonesian media outlet Metro TV and China Media Group, a state-controlled conglomerate, signed a cooperation agreement to exchange content and provide training for their journalists.⁸²
- » Indonesian and Chinese state-owned news outlets Antara and China Daily signed a memorandum of understanding (MoU) for future collaboration.⁸³ The Deputy Editor-in-Chief of China Daily stated that their goal, in collaboration with Antara, was to promote the narrative of China-Indonesia friendship and boost cultural exchanges between the two countries.⁸⁴
- » Metro TV and Antara have established cooperation with the Chinese state news agency, Xinhua.⁸⁵ In December 2019, Xinhua and Antara announced they would collaborate on translating Mandarin articles into Indonesian.⁸⁶
- » The Chinese media outlets Xinhua and China Daily have bought ad space in The Jakarta Post to republish their articles.^{87,88}

- Chinese diplomatic officials have written numerous op-eds and engaged in interviews with Indonesian media outlets highlighting China-Indonesia relations and pushing pro-Chinese narratives.***

- » Chinese ambassadors to Indonesia and other diplomatic officials have published numerous op-eds in Indonesian media outlets arguing for China's diplomacy,^{89, 90} countering criticism of China^{91, 92} and highlighting the development of China-Indonesia relations and cooperation.^{93, 94}
- » Chinese diplomatic officials have participated in interviews with Indonesian outlets discussing China-Indonesia diplomatic^{95, 96} and economic relations,^{97, 98} and on the Taiwan question.^{99, 100}

- Indonesian public opinion of China is high and has improved in recent years, with many elites believing bilateral relations will improve. A 2023 Pew Research Survey found that 49 percent of Indonesians had a favorable opinion of China, while 25 percent held an unfavorable opinion.*¹⁰¹**

- » A 2024 survey by a Singaporean research institute, whose respondents were domestic elites of Indonesia, found that if forced to choose, 73 percent would align ASEAN with China over the United States.¹⁰²

- » In the same survey, around 68 percent of respondents expected Indonesia's relations with China to improve, an increase from the 41 percent of respondents who felt the same in 2023.¹⁰³
- ***Domestic anti-Chinese sentiment remains high, with significant portions of the Indonesian public and political elite skeptical of Chinese Indonesians.***
 - » A 2022 poll by the same Singaporean research institute found that 65 percent of Indonesians thought Chinese Indonesians had “too much influence in the economy,” and 50.8 percent thought they were “too influential in politics.”¹⁰⁴
 - » Political elites have alleged that rivals are communists or sympathetic to communism^{105,106} for political purposes.^{107, 108}
- ***After the 1965 coup attempt, anti-Communist sentiments became prominent among some Indonesian military officials, an ideological legacy that remains present but has waned in recent years.***¹⁰⁹
 - » In 2016, a symposium was held on the 1965 coup; its attendants included retired TNI personnel and former Defense Minister and General Ryamizard Ryacudu, who sought to set the facts straight on the PKI and claimed that a previous symposium on the subject was far too left-wing and sympathetic to the PKI.^{110, 111}
 - » In 2021, former head of the Indonesian National Armed Forces (TNI), Gatot Nurmantyo, alleged that Communist elements had infiltrated the TNI.^{112, 113} The TNI later denied Nurmantyo's allegations.¹¹⁴
 - » However, in March 2022, then head of the TNI, Andika Perkasa, announced that descendants of PKI members would no longer be banned from joining the armed forces.^{115, 116} Andika stated that he was fully certain that PKI would not rise again.¹¹⁷
- ***A popular Indonesian news aggregator owned by the Chinese firm ByteDance was reported to have censored news articles critical of the Chinese government.***
 - » Reuters reported that ByteDance censored content on the Indonesian news aggregator app, Baca Berita, from 2018 to 2020.¹¹⁸
 - » Articles with keywords like “Tiananmen” and “Mao Zedong,” as well as articles covering tensions between Indonesia and China over the Natuna Islands, were removed.¹¹⁹
 - » By the end of 2019, Baca Berita had 30 million downloads and 8 million monthly active users.¹²⁰
- ***Chinese influence via this instrument is expected to increase over the next three years. Despite the persistence of significant internal anti-Chinese and anti-communist sentiment, China has successfully established media influence within Indonesia, and public opinion toward China has improved in recent years.***



I2: Information and Communications Technology (ICT) Support

Current Influence: Medium

Projected Influence: Increasing

- **Indonesian officials are receptive to cooperating with Chinese firms to promote 5G in Indonesia, with some firms holding a significant market share in Indonesia.**
 - » A report by the Carnegie Endowment found that Huawei was the largest supplier, with 31.7 percent market share, in the Indonesian telecom carrier equipment market.¹²¹
 - » In September 2023, Communication and Information Minister Budie Arie Setiadi stated that Indonesia was open to cooperation in promoting 5G in Indonesia with firms like China Mobile.¹²²
- **Chinese firms Huawei and ZTE have established training centers and programs to develop human resources in Indonesia for ICT sectors.**
 - » Huawei and ZTE have established training centers^{123, 124} and programs^{125, 126} in Indonesia to improve the human resources in Indonesia's ICT sectors.
 - » Huawei has formed partnerships with the Indonesian government to provide training and resources to improve Indonesia's cybersecurity efforts.^{127, 128}
 - » In December 2020, Huawei signed an MoU with the Indonesian government that included the training of 100,000 individuals in 5G and cloud sectors, as well as technological cooperation with Indonesian telecom firms.¹²⁹
- **Indonesia has sought to improve collaboration with China on AI, although details are limited.**
 - » The Indonesian government has looked to improve cooperation with China to promote and develop an AI ecosystem in Indonesia.^{130, 131}
- **The failed launch of an Indonesian satellite by a Chinese company has reportedly pushed Indonesia towards American companies.**
 - » In May 2017, the Chinese firm China Great Wall Industry Corporation (CGWIC) and the Indonesian firm Palapa Satelit Nusa Sejahtera (PSNS) agreed to a contract where CGWIC would build and launch a satellite for PSNS, valued at \$220 million.^{132, 133}
 - » However, the April 2020 launch of the CGWIC satellite failed.^{134, 135}
 - » The failed launch was reported to have marked a shift by Indonesia toward American companies like SpaceX.¹³⁶
- **Chinese influence via this instrument is expected to increase over the next three years. Although Indonesian collaboration with Chinese space companies is likely to decline, Chinese firms like Huawei and ZTE have established strong roots within Indonesia and are expected to continue playing a major role in the ICT sector.**



13: Cooperation in Military Intelligence and Communications

Current Influence: Unobserved

Projected Influence: Unknown

- ***Despite an MoU and vague references to intelligence cooperation, there is no reported open-source information about intelligence sharing and cooperation between China and Indonesia.***
 - » References have been made to the Comprehensive Strategic Partnership between Indonesia and China, in which there can be cooperation through intelligence sharing on issues such as counterterrorism.¹³⁷
 - » In November 2023, an MoU was signed by Indonesia's National Counterterrorism Agency and China's Ministry of Public Security to cooperate on counterterrorism "in the fields of information, experience, best practices..."¹³⁸
- ***Projected Chinese influence via this instrument is unknown because of the lack of observed activities.***

M - Military Instruments

China's use of military instruments to gain influence is limited. Bilateral engagements are few, and the potential for further collaboration has been stymied by tensions over the South China Sea. Although China has participated in multilateral exercises with Indonesia, the sheer size and focus of these exercises make any influence gains minimal. The focus of their Comprehensive Strategic Partnership is largely centered on economic collaboration, with broad and limited references to defense cooperation.



M1: Formal Bilateral Military Engagements

Current Influence: Low

Projected Influence: Steady

- ***From 2011 to 2014, Indonesia and China held joint military exercises focused on counterterrorism; however, the exercises were reportedly discontinued in 2015 due to Indonesia and China's tensions in the South China Sea.***
 - » In 2012,¹³⁹ 2013,¹⁴⁰ and 2014,¹⁴¹ China and Indonesia held joint military exercises called "Sharp Knife" that focused on counterterrorism and included Indonesian special forces and the PLA.
 - » The exercises ended in 2015, reportedly due to Indonesia's South China Sea tensions with China.¹⁴²
- ***Since 2014, there has been one reported instance of Chinese and Indonesian naval forces conducting joint exercises.***
 - » In 2021, China and Indonesia held a joint naval exercise off the coast of Jakarta, with the exercises focusing on communication, search and rescue, and maneuvers.¹⁴³
- ***Indonesia rejected a joint military exercise with China in the South China Sea, saying it would not conduct military exercises in the area with any country to preserve regional stability.***
 - » In 2015, the head of the Indonesian armed forces, Nurmantyo, announced that Indonesia would reject participating in a joint exercise with China in the South China Sea.¹⁴⁴
 - » Nurmantyo stated that this rejection applied to all countries that wish to hold joint military activities in the sea to maintain stability in the region.¹⁴⁵
- ***China has reportedly been interested in establishing military logistics facilities in Indonesia, but there is limited reporting as to whether there is continued interest.***
 - » The 2023 China Military Power Report by the U.S. Defense Department found that China had probably considered potential military logistics facilities in Indonesia.¹⁴⁶
 - » There is limited open-source reporting available as to whether there is continued interest.
- ***Chinese influence via this instrument is expected to remain steady over the next three years. Military exercises are likely to remain few and sporadic, with tensions still present in the relationship.***



M2: Shared Informal/Multilateral Military Engagements

Current Influence: Very Low

Projected Influence: Steady

- ***China has consistently attended multilateral naval exercises hosted by Indonesia, but the sheer number of participants involved is likely to dilute any potential influence gains for China.***
 - » In 2014,¹⁴⁷ 2016,¹⁴⁸ 2018,¹⁴⁹ and 2023,¹⁵⁰ China participated in the biennial Multilateral Naval Exercise KOMODO (MNEK) hosted by the Indonesian Navy.
- ***China has conducted joint maritime exercises with ASEAN, with Indonesia as a participant or observer, though these exercises are focused largely on developing cooperation and establishing trust.***
 - » In 2018, ASEAN conducted its first joint maritime exercise with a single country, China, aimed at developing cooperation and maritime security.¹⁵¹
 - » In 2019, China and ASEAN held a joint maritime exercise to foster cooperation and trust; Indonesia was an observer state.¹⁵²
 - » The focus of these exercises is centered on establishing cooperation and building trust, making it unlikely that China can wield significant military influence.
- ***Chinese influence via this instrument is expected to remain steady over the next three years. While China will likely continue to participate in Indonesia's MNEK and multilateral ASEAN exercises, the size and focus of these exercises are expected to result in minimal gains in Chinese military influence.***



M3: Defense/Security Pacts and Agreements

Current Influence: Very Low

Projected Influence: Steady

- ***Indonesia and China elevated their relationship to a Comprehensive Strategic Partnership, but the focus has largely been centered on economic collaboration.***
 - » In 2013, Indonesia and China elevated their relationship to a Comprehensive Strategic Partnership after President Xi's visit to Jakarta.¹⁵³
 - » However, much of the conversation surrounding their Comprehensive Strategic Partnership is focused on economic and investment cooperation, with limited references to defense collaboration.^{154, 155}
- ***Chinese influence via this instrument is expected to remain steady over the next three years. References to China and Indonesia's Comprehensive Strategic Partnership are focused primarily on furthering economic cooperation, making a significant shift in defense collaboration unlikely.***

E - Economic Instruments

China's use of economic instruments to gain military influence in Indonesia is significant but lopsided in its focus. Although China is the seventh-largest arms supplier in Indonesia, it is dwarfed by the total share from the United States and its allies. China and Indonesia have only made references to potential joint production and technology sharing and nothing has materialized from a previous partnership. However, Chinese firms have developed strong roots in the infrastructure, energy, and mining sectors, investing billions and controlling significant market share.



E1: Arms Transfers

Current Influence: Low

Projected Influence: Steady

- ***Since 2012, China has been Indonesia's seventh largest arms supplier and has provided UAVs, munitions, and weapon systems.¹⁵⁶ However, China's share of arms transfers is relatively small compared to that held by the United States and its allies.***
 - » Indonesia has bought the Chinese UAV CH-4B, the mixed attack-and-reconnaissance variant of the CH-4,¹⁵⁷ and has purchased 20 units each of the air-to-surface AR-1 and AR-2 missiles to arm it.¹⁵⁸
 - » From 2014 to 2017, Indonesia acquired two units of naval guns from China, the Type-825 30-mm and ten units of NG-18 30-mm, to modernize its warships.¹⁵⁹
 - » Indonesia has also acquired four units of Type-90 122-mm artillery and four units of the GDF 35-mm anti-aircraft gun and its sensors.¹⁶⁰
 - » Since 2012, China has accounted for 5.4 percent of Indonesia's total import of arms.¹⁶¹ On the other hand, the United States and its allies (South Korea, the UK, France, Germany, and the Netherlands) make up nearly 72 percent of total imports.¹⁶²
- ***In January 2024, Indonesia reportedly expressed interest in acquiring the Chinese coastal defense missile system, the YJ-12E.¹⁶³ However, there is limited reporting on the status of Indonesia's interest in the missile system.***
- ***Chinese influence via this instrument is expected to remain steady, with Indonesia continuing to import Chinese arms at low levels.***



E2: Technology-Sharing and Joint Production Agreements

Current Influence: Very Low

Projected Influence: Steady

- ***China and Indonesia have discussed the possibility of joint production and technology sharing; however, there is limited evidence of any significant developments.^{164, 165}***
- ***Chinese influence via this instrument is expected to remain steady.***



E3: Trade and Cooperation in Strategic Commodities/Sectors

Current Influence: High

Projected Influence: Increasing

- ***Indonesia and China's trade relationship is well developed, with China being the number one source of Indonesian imports and exports.***
 - » According to 2021 data, Indonesia's exports to China amounted to nearly \$54 billion, with a partner share of a little over 23 percent.¹⁶⁶
 - » Imports from China amounted to a little more than \$56 billion, with a partner share of nearly 29 percent.¹⁶⁷
- ***Chinese companies have invested significantly in the Indonesian nickel industry, claiming a dominant position, with billions of dollars poured into developing the supply chain.***
 - » The U.S. Defense Department has identified nickel as an important resource due to its use in the production of aerospace alloys, stainless steel, and lithium-ion batteries.¹⁶⁸
 - » Indonesia's nickel production is the largest in the world, amounting to 50 percent of total production at the end of 2023.¹⁶⁹
 - » Since Indonesia's extensive 2014 ban on nickel ore exports (later followed by a complete ban in 2020),¹⁷⁰ Chinese companies have invested billions in the Indonesian nickel industry.¹⁷¹ The International Energy Agency puts investment from Chinese companies at \$30 billion.¹⁷²
 - » Chinese companies such as Tsingshan Holding Group, Zhejiang Huayou Cobalt, and Ningbo Lygend are reported to have built over 90 percent of nickel smelters in Indonesia.¹⁷³
- ***Significant attention has been drawn to Chinese infrastructure investment, with numerous projects planned and some having been completed.***
 - » In October 2023, Indonesia launched the first high-speed railway in Southeast Asia, which runs from Jakarta to Bandung.¹⁷⁴ The project first broke ground in 2016 and has been primarily funded with \$7.3 billion from China.¹⁷⁵
 - » An Indonesian official from the investment ministry reported that there are currently 9 projects ongoing in the infrastructure sector.¹⁷⁶
 - » In 2024, then-President Widodo proposed that Chinese companies help develop a transport system in Indonesia's new capital, Nusantara.¹⁷⁷
- ***Coal dominates Indonesia's domestic energy production. Chinese companies have invested significant capital in the country's coal power plants and plan further development.***
 - » Indonesia's main energy sources, both imported and domestically produced, are coal and oil. Coal is the dominant source of energy production in Indonesia, comprising 67 percent of domestic production.¹⁷⁸
 - » Chinese companies have invested significant capital and hold controlling interests in multiple coal-powered plants in Indonesia.^{179, 180} Reportedly, Chinese investments are involved in fourteen coal power plants in Indonesia, with dozens of new projects planned.¹⁸¹

- » Coal power plants provide much of the energy needed for Indonesia's growing nickel industry, which mainly uses Class 2 nickel, a type of nickel that is energy-intensive to process.¹⁸²
- ***Chinese influence via this instrument is expected to increase. Chinese firms have developed strong roots across multiple sectors in Indonesia and are playing an important role in Indonesia's growth, which is expected to continue.***

CONCLUSIONS

China's current M-DIME influence in Indonesia is assessed as Low. China's limited military influence is exercised primarily through select Diplomatic and Economic instruments. Chinese companies are heavily involved in Indonesia through trade and cooperation in strategic commodities and sectors (E3). Diplomatic engagements between heads of state and defense officials have established a close relationship, markedly different from decades past (D1). However, China has not found the same success in its defense relationship with Indonesia. Diplomatic engagements are frequent but primarily about economic issues. Joint production is nonexistent, and China holds a minor share in Indonesia's arms imports, which are dominated by the United States and its allies (E1 and E2). Despite some success by China in Indonesia's media environment and public opinion, there remains a deep-rooted anti-Chinese sentiment that has contributed to splintering relations in decades past (I1). This sentiment's significance is highlighted within the Indonesian armed forces, where an institutional legacy of anti-communism and mistrust of China remains prevalent.

China's projected M-DIME influence in Indonesia is assessed as Steady. Although its use of specific Informational and Economic instruments is expected to increase, China faces significant obstacles in increasing the use of other levers to expand its military influence in Indonesia. Indonesia provides a large market for Chinese ICT firms like Huawei and ZTE to grow, and Indonesian officials have appeared to be receptive toward cooperation with China in this domain (I2). Growing Chinese dominance in Indonesia's ICT, along with potential AI collaboration, could create technological dependencies, pose cybersecurity risks, and challenge U.S. technological leadership and market access. China is also likely to expand media collaboration following recent agreements with Indonesian outlets (I1). Expanded media cooperation could allow China to shape narratives favorably toward

Beijing and potentially against U.S. interests. Although opinion of China among Indonesians is positive, there remains a strong anti-Chinese sentiment in the Indonesian armed forces, which serves as a roadblock for China to significantly move forward its defense relationship with Indonesia. China's projected increase in economic influence could potentially restrict U.S. access to strategic resources critical for defense and energy transitions, particularly nickel, and solidify China's economic position in a key Southeast Asian nation (E3). However, China's ability to translate all these gains into broader military influence is expected to remain constrained by historical mistrust and ongoing tensions surrounding maritime claims near the Natuna Islands.

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