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Middle-Power Geoeconomics: Indonesia's Economic Diplomacy in the EV Battery Value Chain between China and the EU

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ABSTRACT: This article examines Indonesia's economic diplomacy strategy within the global electric vehicle (EV) battery value chain, with a focus on the country's downstream nickel industrial policy. As the world's largest nickel producer, Indonesia has leveraged its resource advantage by banning raw nickel exports and promoting domestic value-added production. This policy has attracted significant Chinese investment, particularly from companies such as CATL and Tsingshan, while simultaneously triggering a legal dispute with the European Union (EU) at the World Trade Organization (WTO). Through the conceptual lens of economic diplomacy and geoeconomics, this study analyzes how Indonesia, as a rising middle power, navigates competing interests between China and the EU. Using a qualitative case study method and discourse analysis of policy documents and international reports, the article argues that Indonesia's industrial policy serves both economic and diplomatic functions. It concludes that Indonesia must enhance its institutional capacity and technological diplomacy to avoid asymmetric dependence and to maintain strategic autonomy in an increasingly polarized global supply chain.

Keywords: Economic Diplomacy, Indonesia, Nickel, China, European Union.

INTRODUCTION

The global transition towards clean energy and sustainable transportation has significantly accelerated the demand for electric vehicles (EVs). Central to this shift is the need for efficient and high-capacity batteries, wherein nickel plays a pivotal role due to its properties that enhance energy density and battery longevity. EV were first developed in the 1830s in the USA, UK, and the Netherlands as experimental innovations (Hakam & Jumayla, 2024). Although technological advancements, especially in the 1990s, allowed EVs to reach the market, their widespread adoption has been limited due to challenges such as high battery costs, limited driving range, and lower performance compared to traditional gasoline-powered vehicles (Hakam & Jumayla, 2024). In Indonesia, where road transport significantly contributes to greenhouse gas emissions, the

government addressed the issue by enacting Presidential Regulation No. 55 of 2019, accompanied by supporting ministerial policies, to encourage the growth of the electric vehicle (EV) industry (Maghfiroh et al., 2021). Electric vehicles (EVs) are a key solution to reducing emissions in the transportation sector, as they are more energy-efficient than fossil fuel-powered vehicles and produce fewer greenhouse gases. Beyond environmental benefits, the adoption of EVs in Indonesia could also lead to positive economic impacts. Specifically, it could reduce the nation's dependence on imported fuel oil (BBM), lowering costs and improving energy security (Humayro & Virgianita, 2024).

Indonesia, possessing the world's largest nickel reserves, has strategically positioned itself as a key player in the EV battery supply chain (Paramita, 2024). At the same time, its status as Southeast Asia's biggest consumer market and the rising purchasing power of its middle class are expected to boost vehicle sales (Equity Team, 2024). Indonesia is rich in minerals like bauxite, manganese, gold, copper, tin, cobalt, and especially nickel, which is essential for the global clean energy transition. Its nickel output surged from 130,000 tonnes in 2015 to 1.8 million tonnes in 2023, contributing 50% of global production and holding 42% of the world's reserves (Michel, 2024). Indonesia became the top nickel producer in 2018, tripling output by 2023 and increasing its global share from 5% to 50% in eight years (Michel, 2024). Cobalt production also grew significantly, rising eightfold between 2021 and 2023.

Recognizing the potential economic benefits in early years, the Indonesian government implemented a ban on the export of unprocessed nickel ore in January 2020, aiming to stimulate domestic processing industries and attract foreign investment into its burgeoning EV sector (WTO, 2022). This policy, while economically strategic, has elicited varied international responses. Notably, the European Union (EU) challenged Indonesia's export ban at the World Trade Organization (WTO), arguing that such restrictions contravene international trade agreements by limiting access to essential raw materials (Sugihartono, 2024). The EU's contention underscores the broader implications of resource nationalism on global supply chains and the tensions it can create among trading partners. This is highlighted by a WTO lawsuit under General Agreement on Tariffs and Trade (GATT) 1944 (Mubarok & Kartini, 2024). This dispute makes Indonesia's diplomatic situation more complicated, but handling this issue well will be vital for strengthening it standing in global area.

Conversely, Indonesia's policy has fostered closer economic ties with China. Chinese companies, such as Contemporary Amperex Technology Co. Ltd. (CATL), have invested heavily in Indonesia's EV battery industry, establishing joint ventures and infrastructure projects that bolster Indonesia's position in the global EV market (Yong, 2024). This collaboration not only enhances Indonesia's industrial capabilities but also reflects a strategic alignment with China's Belt and Road Initiative, aiming to expand China's influence through infrastructure and investment. The dichotomy of responses from the EU and China to Indonesia's nickel export policy highlights the complexities of economic diplomacy in the context of critical resource management. Indonesia's approach exemplifies how nations leverage natural resources to negotiate economic partnerships and assert their interests on the global stage. This article seeks to explore the nuances of Indonesia's economic diplomacy concerning its nickel resources, focusing on two primary research questions:

1. How does Indonesia employ economic diplomacy within the EV battery value chain?
2. In what ways does Indonesia navigate its strategic interests between China and the European Union?

By examining these questions, the study aims to elucidate the strategies employed by Indonesia to balance domestic economic objectives with international diplomatic relations, particularly in the context of the evolving global EV industry. Moreover, this study tries to fill the gap in the literature on resource economic diplomacy in Southeast Asia, by highlighting how Indonesia uses its downstream policy as a geoeconomic instrument in the context of great power competition.

METHOD

This study adopts a qualitative descriptive research design with a case study approach, focusing on Indonesia's economic diplomacy within the electric vehicle (EV) battery value chain. The qualitative method is chosen to explore the complexities and nuances of Indonesia's policies and international interactions, allowing for an in-depth understanding of the subject matter (Yin, 2018).

A. Data Collection:

The research utilizes secondary data sources, including:

1. Policy documents: Presidential regulations, publications from the Ministry of Energy and Mineral Resources (ESDM), and reports from the Investment Coordinating Board (BKPM).
2. International organization reports: Publications from the International Energy Agency (IEA), World Trade Organization (WTO), and International Renewable Energy Agency (IRENA).
3. Statements from officials: Speeches and interviews of Indonesian policymakers.
4. News reports: Articles from reputable media outlets covering developments in Indonesia's nickel industry and EV battery sector.
5. Academic literature: Scholarly articles and books discussing economic diplomacy, geoeconomics, and Indonesia's role in the global EV market.

B. Data Analysis:

The study employs discourse analysis and the geoeconomics framework to interpret the data:

1. Discourse Analysis: This method examines how language and narratives are used by Indonesian officials and stakeholders to frame policies and international engagements. It helps in understanding the underlying ideologies and objectives conveyed through official communications (Frawley, 1993)
2. Geoeconomics Framework: This analytical lens explores the interplay between economic strategies and geopolitical objectives. It assesses how Indonesia leverages its nickel resources

to achieve national interests, navigate international disputes (such as the WTO case with the EU), and attract foreign investments, particularly from China (Thompson, 2017).

By integrating these analytical tools, the research aims to provide a comprehensive understanding of Indonesia's strategic maneuvers in the EV battery value chain, highlighting the country's efforts to balance domestic development goals with its international diplomatic engagements.

Economic diplomacy has emerged as a vital instrument of foreign policy in the 21st century, particularly for countries seeking to position themselves strategically in the global economy. Broadly defined, economic diplomacy refers to the use of economic tools, such as trade, investment, and financial policy, to achieve foreign policy goals. As Bayne and Woolcock suggest, economic diplomacy encompasses the processes by which countries negotiate international economic agreements and promote their economic interests abroad (Bayne et al., 2017). At its core, economic diplomacy involves both traditional diplomacy—conducted through foreign ministries and embassies—and commercial diplomacy, which is often led by trade and investment agencies, ministries of industry, or state-owned enterprises. It blends domestic economic policy with external relations, thereby requiring coordination between multiple actors, including government institutions, private sectors, and international partners (Okano-Heijmans, 2011). The increasing interdependence of global markets has heightened the importance of economic diplomacy, making it a strategic arena where states compete and cooperate to secure favorable access to markets, resources, and technologies. One of the critical functions of economic diplomacy is its dual orientation: it is both inward-looking and outward facing. On the one hand, it aims to promote national development by attracting foreign investment, enhancing exports, and protecting strategic industries. On the other, it seeks to shape international economic environments in ways that align with a country's broader geopolitical and developmental objectives (Lee, 1999). In this sense, economic diplomacy becomes a conduit through which domestic economic priorities are projected into the international arena.

Scholars have also emphasized the instrumental role of economic diplomacy in resource management and strategic industries. Countries rich in natural resources often leverage them not just for revenue but also as geopolitical tools to build influence and partnerships. This approach is particularly relevant in sectors that are embedded within complex global supply chains, such as energy, rare earth minerals, and green technologies. Furthermore, economic diplomacy is closely intertwined with the politics of global production networks. As Ravenhill explains, global value chains have reconfigured the geography of economic power, giving rise to new forms of dependency, bargaining, and leverage (Ravenhill, 2008). In such contexts, the control over upstream or downstream segments of production can significantly alter a country's negotiating position in international forums. In this article, economic diplomacy is used as the conceptual lens to examine how Indonesia, as a resource-rich emerging economy, utilizes its domestic industrial policy—particularly the downstreaming of nickel—as a tool to enhance its influence within the global electric vehicle (EV) battery supply chain. By focusing on Indonesia's engagements with both China and the European Union, this framework helps illuminate the strategic calculations behind Indonesia's efforts to transform its economic assets into diplomatic capital.

RESULT AND DISCUSSION

Indonesia's Downstreaming Strategy and Position in the Global EV Value Chain

In response to the escalating global demand for electric vehicles (EVs) and the critical role of nickel in lithium-ion batteries, Indonesia has embarked on an ambitious downstreaming strategy aimed at enhancing its position within the global EV value chain. Central to this strategy is the government's decision to ban the export of unprocessed nickel ore, a policy shift designed to stimulate domestic processing industries and attract foreign direct investment into the country's burgeoning EV sector. In January 2020, the Indonesian government implemented a ban on the export of nickel ore with a content below 1.7% Ni, effectively accelerating the timeline from the initially planned 2022 deadline (Lestari et al., 2024). This policy, articulated in Ministry of Energy and Mineral Resources (MEMR) Regulation No. 11/2019, was intended to expedite the development of domestic smelting facilities and ensure that the nation could capitalize on its abundant nickel reserves by moving up the value chain (Panggabean, 2019). The immediate impact of this announcement was a significant surge in global nickel prices, reflecting the market's sensitivity to Indonesia's policy decisions given its substantial share in global nickel production. Following the export ban, Indonesia has witnessed a marked increase in the construction of nickel smelters and the establishment of industrial parks dedicated to nickel processing and battery production. The Indonesia Morowali Industrial Park (IMIP) in Central Sulawesi has emerged as a flagship project, attracting significant foreign investment and becoming a hub for nickel-related industries (Yeung, 2023). Unfortunately, at that time, some of the private sectors in Indonesia was still reticent to enter the sector. To overcome it, Indonesian government also established a state-owned enterprise called Indonesia Battery Corporation (IBC) in 2021 (Lahadalia et al., 2024). While IBC collaborating with international companies like LG Chemical and CATL for battery manufacturing, Indonesia also involves key stakeholders such as Pertamina and PLN for infrastructure (Damanik et al., 2024). These developments are part of a broader governmental initiative to create an integrated EV ecosystem, encompassing everything from raw material processing to battery manufacturing and assembly. By fostering such an ecosystem, Indonesia aims to position itself as a key player in the global EV supply chain, thereby enhancing its economic resilience and technological capabilities. Not only that, with engaging in this strategy greatly enhances employment and human capital development. As companies grow on these operations, they require more labor and higher demand for specialized skills. A survey stated that 79% of Indonesian firms involved in downstream processing reported that their workforce grew due to their move into value-added activities (Juhro et al., 2024). From here, it can be seen this strategy can not only maintain its position in the global EV value chain but can also maintain its economic condition.

Strategic Economic Relations with China

Indonesia's downstreaming strategy has been significantly bolstered by strategic economic partnerships, particularly with Chinese enterprises. These corporations took interest and aligned their economic goals with Indonesia’s development strategy. Between 2014 and 2020, foreign direct investment exceeding US$10.2 billion was directed toward building nickel smelters in Morowali Regency, Central Sulawesi (Wijaya & Sinclair, 2025). Furthermore, when Indonesia is

facing major challenges in the aftermath of Covid-19, the development of nickel smelters offers a promising avenue for recovery. As China anticipates that Indonesia's nickel reserve will be essential in meeting global EV battery demands by 2040, A $1 billion investment from a Chinese company to develop an industrial zone on Obi Island could also boost economic recovery (Juned, 2023). These collaborations have not only provided the necessary capital and technological expertise but have also aligned with broader geopolitical initiatives such as China's Belt and Road Initiative (BRI). A notable example of this partnership is the investment by Contemporary Amperex Technology Co. Limited (CATL), China's leading EV battery manufacturer. In 2022, CATL announced a nearly $6 billion investment in an integrated project encompassing nickel mining, processing, battery materials production, and battery recycling in Indonesia (CATL, 2022). This venture, conducted in collaboration with Indonesian state-owned enterprises PT Aneka Tambang (ANTAM) and PT Industri Baterai Indonesia (IBI), underscores the mutual benefits perceived by both nations in strengthening their positions within the EV market. Similarly, Tsingshan Holding Group, another Chinese conglomerate has played a pivotal role in developing Indonesia's nickel processing capabilities. Through substantial investments in smelting facilities and industrial parks, Tsingshan has contributed to the rapid expansion of Indonesia's nickel production capacity, further embedding Chinese capital and technology within the country's industrial landscape (Nickel, 2024). In 2014, Tsingshan Group, as the world's top producer of ferronickel and stainless steel, became the leading Chinese investor in Indonesia's mineral processing sector by heavily investing in the Indonesia Morowali Industrial Park (IMIP) in Central Sulawesi's nickel-rich Bahodopi district (Tritto, 2023). This region, known for its rich nickel resources, served as a strategic hub for Tsingshan's expansion in mineral processing and steel production. investments are emblematic of the broader objectives of the BRI, which seeks to enhance global trade connectivity through infrastructure development and economic collaboration. BRI designed to shift the country's economic focus toward boosting exports and domestic consumption, By investing in infrastructure and expanding trade routest, support sustainable economic development, and enhance China's global influence through stronger ties with participating countries (Antika et al., 2025). For Indonesia, aligning with the BRI has facilitated access to Chinese capital and expertise, accelerating the development of its domestic industries. However, this alignment also necessitates careful navigation to ensure that such partnerships are equitable and do not lead to over-dependence on a single foreign entity, thereby safeguarding Indonesia's economic sovereignty**.**

Tensions with the European Union: WTO Dispute and the Narrative of Fair Trade vs. Resource Nationalism

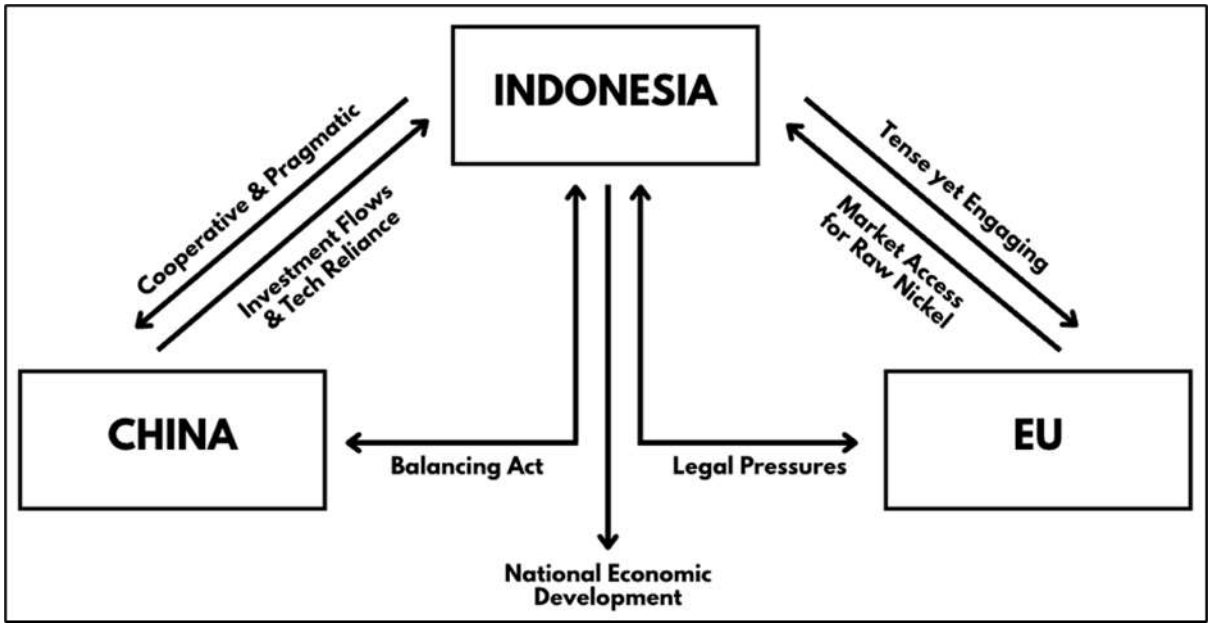
Indonesia implemented a full ban on unprocessed nickel ore exports starting January 1, 2021, following the amendment of Law Number 3 of 2020 (Meirizal et al., 2023). The policy aimed to boost domestic value-added industries, particularly in the electric vehicle (EV) battery supply chain, by encouraging local processing of nickel, also to process nickel into higher-value products instead of merely exporting it in its raw form (Meirizal et al., 2023). This strategic move was positioned as a step toward national industrial growth. However, this policy triggered immediate backlash from the European Union (EU), which heavily relies on imported nickel for its stainless steel and green tech industries. The EU lodged a formal complaint with the World Trade Organization (WTO),

claiming that Indonesia's ban violated Article XI of the General Agreement on Tariffs and Trade (GATT), which prohibits quantitative restrictions on exports (European Commission, 2019). In November 2022, the WTO ruled in favor of the EU, declaring that Indonesia's export restrictions and domestic processing requirements were inconsistent with its obligations under international trade law (European Commission, 2022) However, Indonesia appealed the ruling, asserting its sovereign right to regulate strategic resources in support of long-term industrialization. The appeal was submitted to the WTO's Appellate Body, which has been effectively non-functional since late 2019 due to the United States' refusal to approve new members, thus placing the legal process in limbo (Reuters, 2022). This dispute reveals a deeper ideological clash between two visions of global economic governance: the EU's advocacy for open markets and "fair trade," versus Indonesia's assertion of "resource nationalism," where strategic commodities are leveraged for national development. From Indonesia's perspective, the raw export ban is not protectionism per se, but a proactive geoeconomic move to reposition the country within the global value chain as a producer of intermediate and final goods, not just a supplier of raw materials (Kalantzakos, 2020). The government has argued that development cannot be achieved if resource-rich nations remain trapped in a cycle of commodity dependency.

Indonesia's Economic Diplomacy Maneuvers: Diversification and Strategic Engagement

Based on the sections before, the interaction Indonesia's built between China and EU have differences. For better understanding, a scheme of interaction between Indonesia-China-EU is provided below which include the comparison in diplomatic directions and economics interests between these countries related to the economic diplomacy in the EV Battery Value Chain.

Figure 1. Scheme of Interaction between Indonesia-China-EU



Source: Managed by the Author.

Considering the tensions with the EU and the broader geoeconomic rivalry over supply chains, Indonesia has adopted an active economic diplomacy strategy aimed at diversifying partnerships

and maximizing its bargaining position. One pillar of this strategy is engagement in multilateral and regional economic frameworks. Indonesia's participation in the Indo-Pacific Economic Framework for Prosperity (IPEF), launched by the United States, is part of its bid to align with a broader coalition that emphasizes resilient supply chains and green energy transition (Peck, 2024). While the IPEF is not a trade agreement in the conventional sense, it provides Indonesia with a platform to attract investment and showcase its commitment to sustainable and secure mineral supply (Negara & Wihardja, 2023). Simultaneously, Indonesia is strengthening bilateral partnerships beyond the China-EU dichotomy. Notably, the Indonesia-Canada Comprehensive Economic Partnership Agreement (CEPA), signed in late 2024, includes a chapter dedicated to critical minerals cooperation and sustainable investment (Bahri, 2024). This marks a significant step toward diversifying downstream investment sources and ensuring technology transfer without compromising sovereignty (Kurniawati, 2024). Indonesia's strategy also entails offering "win-win" proposals to the EU — such as joint ventures in nickel smelting, co-financing of sustainable mining operations, and technological collaboration in battery recycling — to defuse tensions while maintaining strategic autonomy. Indonesia's maneuvering reflects the essence of economic diplomacy: balancing domestic development priorities with the need to remain an attractive and reliable partner in the global economy. Rather than succumbing to pressures from either side, Indonesia is pursuing a middle-power diplomacy that combines assertiveness with flexibility. This approach not only strengthens its regional influence in ASEAN but also allows Indonesia to negotiate from a position of strength in emerging economic orders like IPEF and other plurilateral initiatives (Cooper, 1997).

CONCLUSION

Indonesia's assertive downstream nickel policy reflects a broader evolution in its foreign policy — from a passive commodity exporter to a strategic actor engaging in economic diplomacy. By positioning itself at the heart of the global electric vehicle (EV) battery supply chain, Indonesia has transformed its domestic industrial policy into a tool of international leverage. This approach aligns with the behavior of a rising middle power, one that seeks to amplify its voice in global economic governance through the strategic utilization of its resource endowments and geoeconomic potential. The case of Indonesia's tensions with the European Union, juxtaposed with its deepening ties with China, underscores the dual-edged nature of this diplomacy. On the one hand, resource nationalism has allowed Indonesia to capture greater value from its nickel reserves and attract high-profile investments. On the other hand, the challenge of navigating rival interests between global powers highlights the limits of unilateralism in an increasingly interconnected economy. Indonesia's experience demonstrates that downstream industrialization is not merely a matter of economic policy but a complex act of international negotiation and positioning — one that requires institutional capacity, credibility, and diplomatic agility.

Looking ahead, Indonesia must consolidate the gains from its downstream policy while ensuring its long-term sustainability. First, this necessitates a stronger commitment to developing technological capacity and reducing dependency on foreign investors, especially in critical areas

such as battery manufacturing and EV innovation. Second, Indonesia should deepen technological diplomacy with actors like the European Union, transforming areas of tension into potential cooperation in fields such as green technology, sustainable mining, and circular economy initiatives. Third, institutional reforms and regulatory consistency will be key to sustaining investor confidence and enhancing industrial competitiveness. By reinforcing domestic capacity and diversifying international partnerships, Indonesia can avoid strategic entrapment in great power rivalries. More importantly, it can shape a more equitable and sustainable position in the global value chain — not as a battleground of external interests, but as a proactive middle power advancing its national development agenda through strategic and principled economic diplomacy.

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