

**Indonesia's Maritime Strategy:
Lofty Aspirations Without the Means to Achieve Them**

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14. ABSTRACT The Republic of Indonesia's (ROI) recent maritime strategy, articulated in the Global Maritime Fulcrum (GMF) in 2014 by newly-elected President Joko Widodo, describes an aspirational set of strategic maritime interests in support of a greater Indonesian leadership role in Southeast Asia. Given these strategic interests, the ongoing transformation and modernization of the Indonesian Navy (to field the Minimum Essential Force – MEF – by 2024) represents a significant strategy misalignment between ends and means. An analysis of the economic means available to acquire the MEF demonstrates that the MEF force structure is unaffordable. Comparing capabilities to mission requirements highlights the MEF's shortfall in capabilities to achieve ROI's strategic maritime interests. Finally, the MEF undermines existing regional cooperation frameworks because it is a destabilizing influence, it is inadequate at deterring China's territorial assertiveness, and it reduces the potential effectiveness of the Association of Southeast Asian Nations (ASEAN) in addressing regional issues. The author concludes with several recommendations for how the United States might support ROI in addressing these challenges. However, ROI will need to make difficult decisions about what it can do and what it should do to resolve this strategic misalignment.					
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INTRODUCTION

Located between the Indian and Pacific Oceans, the Republic of Indonesia (ROI) is the largest archipelagic nation in the world, consisting of approximately 17,000 islands spread across a distance of almost 5,000 km.¹ ROI's population of more than 250 million people is surrounded by 5.8 million square km of water, including its inland waters, territorial seas, and Exclusive Economic Zone (EEZ).² Despite its geographic position and physical configuration and its long tradition of marine and coastal resource utilization, ROI has historically lacked the capability to secure its maritime environment.³ Political challenges, economic crises, and confused maritime governance have prevented the Indonesian Navy (Tentara Nasional Indonesia – Angkatan Laut, TNI-AL) from achieving much progress in changing this.⁴

After the turn of the century, ROI, along with other nations in South-East Asia, embarked on a program of naval modernization to replace obsolete equipment with more capable platforms. This modernization program described a Minimum Essential Force (MEF) that would be in service by 2024. Five years after beginning this program, newly-elected Indonesian President Joko Widodo outlined a maritime strategy – the Global Maritime Fulcrum (GMF) – that called for a greater leadership role in Southeast Asia and an increased maritime defense force. There are significant obstacles to achieving this maritime strategy. First, given ROI's current economy and defense spending, it is unrealistic to expect it to be able to afford the high cost of the MEF platforms. Second, capability requirements differ between three required areas of operations: regional power projection, operations within its Exclusive Economic Zone (EEZ), and operations in coastal and internal waters. The MEF would give ROI only marginal power projection capability and would be unable to successfully enforce its EEZ or provide adequate internal maritime security. Finally, the MEF risks undermining the stabilizing capability of

regional security cooperation frameworks and the economic and security value these frameworks can offer. Given the stated strategic interests described by President Joko Widodo, the desired transformation and modernization of the TNI-AL represents a significant strategy misalignment between ends and means.

BACKGROUND: GMF AND THE MEF ROADMAP

In his inauguration speech in October 2014, President Widodo affirmed ROI's recognition of the importance of maritime security. Widodo called on Indonesians to "work as hard as possible to turn Indonesia into a maritime nation once again. Oceans, seas, straits, and bays are the future of our civilization."⁵ In November 2014, in an address at the East Asia Summit, he further clarified his vision for ROI's restoration as a maritime power by stating that it lies at the center of 21st-century strategic changes in economics and geopolitics.⁶ He outlined a maritime-focused development agenda and strategy (the GMF) supported by five pillars of strategic maritime interest: reestablishing a maritime culture, developing maritime resources (especially food), improving maritime infrastructure, increasing cooperation with other nations in the maritime domain, and expanding maritime defense forces.⁷

In 2009, the TNI-AL Chief of Staff established a roadmap for force modernization and structural changes to take place over two decades.⁸ This roadmap evolved from a series of ambitious proposals to improve the combat capability of the TNI-AL and provide it with greater regional power projection capability.⁹ The MEF articulated in this roadmap described the forces needed to address (1) military threats originating north of ROI, (2) questions over conflicting maritime claims, and (3) a wide range of internal security concerns.¹⁰ The MEF would include

the capabilities the TNI-AL assesses it needs to address both current and anticipated future threats by 2024.

Evan Laksmana, a researcher at the Center for Strategic and International Studies (CSIS) in Jakarta, provides a comprehensive overview of Order Number 39, issued by the Indonesian Chief of Naval Staff in 2009, that describes a broad range of anticipated missions the MEF should perform and a detailed plan for platform acquisition to accomplish those missions.¹¹ From such high-intensity missions as the destruction of enemy combatants, amphibious assault, and special warfare to a wide variety of low-intensity and law enforcement missions ranging from countering piracy, countering illicit trafficking, and enforcing maritime border security, the MEF roadmap is based upon a broad spectrum of possible mission sets. These missions cover the range of military and security operations inside ROI's territorial waters and EEZ as well as power projection into the Southeast Asian seas that would establish it as a "green water" navy.¹²

To enable the TNI-AL to achieve green water status and accomplish such a diverse spectrum of possible operations, the MEF roadmap describes a robust force structure comprised of both high-end and low-end platforms, totaling 274 ships serving three broad purposes: strike (110 ships), patrol (66 ships), and support (98 ships).¹³ The MEF naval transformation plan is divided into three phases (2010-2014, 2015-2019, and 2019-2024) and three lines of effort: procurement of new platforms, upgrades and enhancements to existing platforms, and retirement of obsolete platforms.¹⁴ Additionally, ROI's 2012 Law 16, Defense Industry Act, requires new acquisition programs to use Indonesian defense companies as much as possible.¹⁵ In 2014, President Widodo stressed the importance of this indigenous acquisition policy to expand ROI's defense capacity and reduce its dependence on foreign defense suppliers.¹⁶

CAN INDONESIA AFFORD THE MEF?

Given the range of missions required under GMF, from low-intensity law-enforcement activities to high-intensity combat, the MEF requires a significant number of high-end platforms and a greater number of low-end platforms. The cost of acquiring this range of platforms exceeds ROI's economic means. Current budget trends do not support the anticipated acquisition costs to field the MEF. Additionally, the requirement to continue operating inefficient, obsolete ships and the Indonesian Army's dominance in ROI's military culture have put additional pressure on the TNI-AL's budget.¹⁷

When the TNI-AL issued the MEF roadmap, it was projected to require roughly one-third of defense procurement budgets, based on an assumption of total defense spending growing to two percent of Gross Domestic Product (GDP) by 2014 and three percent of GDP by 2024.¹⁸ Actual defense spending in 2010 was \$5.84 billion (USD equivalent), or 0.7% of GDP, increasing to \$7 billion, 0.8% of GDP, in 2014.¹⁹ 2017 overall defense spending was 0.81% of GDP, a far cry from the 1.5-2% of GDP needed to achieve the MEF, according to the 2010 Strategic Defense Plan and officials in the TNI-AL.²⁰ While ROI's economy has been growing at just over five percent annually, defense budgets have stagnated at around \$7.5 billion from 2015 to the present, and procurements budgets are decreasing below \$1 billion, well below the \$2.5 billion hoped for in the original MEF roadmap.²¹ ROI has applied a significant share of its limited procurement funding to a small number of expensive platforms, minimizing its ability to procure large numbers of lower-capability platforms such as patrol or fast attack craft. For example, in 2011, it agreed to a \$1.1 billion deal with South Korea to acquire three submarines, two of which are in service today.²² In contrast, the KCR-60M fast attack craft has a unit cost of approximately \$14 million.²³ If the TNI-AL had acquired one less submarine, it could have

afforded an additional 26 KCR-60Ms. Given the current trend in defense (and procurement) spending and the high cost of complex, modern platforms, the TNI-AL will be unable to meet its planned acquisition to modernize its naval forces according to the MEF roadmap.

Considering the mismatch between procurement requirements and the funding levels being applied to them, it is worthwhile to examine the progress the TNI-AL is making in fielding new platforms. Assessing the progress of the modernization plan is difficult to quantify, because fewer new-platform acquisitions can be numerically offset by delaying the retirement of older platforms. However, data on new acquisitions and retirements for the first MEF phase (2010-2014) are available and provide a reasonable forecast of likely progress in the second and third MEF phases through 2024. Based on analysis of planned versus actual procurements of new systems and retirements of obsolete equipment during the first phase (2010-2014), the TNI-AL procured only 20 of 39 planned platforms and retired fewer than half (five of eleven) of planned retirements.²⁴ While the second phase (2015-2019) is still in progress, as of September 2018, ROI has added one submarine (three were planned), two planned SIGMA PKR frigates, 16 PC-40 patrol craft (30 were planned), two survey vessels, and one tank landing ship (four were planned).²⁵ Based on the acquisition progress in phases one and two of the MEF roadmap, the only way the TNI-AL can achieve its numerical goal of 274 ships is to continue operating obsolete equipment longer than planned. As expected from the gap between budgets and requirements discussed previously, it is not surprising that the TNI-AL is not fielding systems in the numbers envisioned in the roadmap.

In addition to insufficient overall defense spending, TNI-AL's procurement budgets for new platforms are being squeezed by competing pressures. Shortfalls in new platform acquisitions force the TNI-AL to operate and maintain older equipment. These older platforms

are increasingly expensive to operate and drive up operations and maintenance funding requirements. For example, from 2004 to 2005, the TNI-AL fuel and lubricant expenses were nearly \$7 million greater than necessary because of inefficient power plants in older ships.²⁶ Additionally, Gregory Raymond describes how TNI-AL budgets are adversely impacted by the cultural dominance of the Army in ROI's armed forces, concerning both control over budgets and levels of political influence.²⁷ ROI has been unable to acquire modern platforms in the numbers envisioned by the MEF construct because of insufficient defense spending by the government, particularly in procurement budgets. The strategic interests described by President Widodo's GMF strategy cannot be achieved, because the economic means are not aligned with strategic ends.

MEF CAPABILITIES VERSUS GMF MISSIONS

Even if ROI could overcome economic obstacles to procuring and fielding its MEF, it is unlikely that the MEF would have the necessary capability to support the Global Maritime Fulcrum (GMF) concept. The five pillars of President Widodo's GMF concept highlight the diversity of challenges faced by ROI. Two pillars (increasing cooperation with other nations in the maritime domain and expanding maritime defense forces) are outwardly-focused and suggest a need for high-capability platforms that can operate at the high-intensity end of the conflict spectrum. The other three pillars are inwardly-focused on improving infrastructure, managing resources, and developing a maritime culture, calling for lower capability platforms conducting less intense patrolling and law enforcement missions.

To meet ROI's ambition to become a medium regional power with a green water navy, the TNI-AL will require modern platforms with the capabilities to meet a wide range of possible

maritime challenges. According to Koh Collin, the TNI-AL's green-water-navy aspirations would posture it to be "primarily oriented towards operating within the EEZ while possessing a limited, secondary ability to conduct 'out-of-area' operations."²⁸ Geoffrey Till describes several criteria useful for categorizing a navy as small or medium, including function versus capability and geographic reach.²⁹ It is, therefore, useful to evaluate the MEF's capabilities and requirements in three operational environments: projection of power in the larger Southeast Asia region outside Indonesia's EEZ, maritime operations inside its EEZ, and operations in its near coastal water.

Outside ROI's EEZ, MEF mission sets regarding out-of-area power projection are mostly limited to sea control operations such as destroying enemy naval forces and interdicting sea lines of communication.³⁰ The responsibility to accomplish these missions would fall on the TNI-AL's submarine force and future major surface combatants, namely its new PKR SIGMA frigates.³¹ Despite the TNI-AL's ambitions to project power regionally, submarine and frigate sensor and weapon capabilities suggest that Indonesia's ability to operate beyond its own waters will be limited to anti-submarine and anti-surface warfare. In a more pessimistic assessment, Benjamin Schreer argues that ROI's high-end platforms are actually more focused on the defensive concept of anti-access that holds would-be attackers at risk of losing high-value platforms.³² In his assessment, the TNI-AL's submarines, frigates, corvettes, and anti-ship cruise missile-equipped fast attack craft represent a coastal defense capability, not a power projection capability. While the PKR SIGMA frigates have the flexibility to perform functions outside of conflict, the TNI-AL's submarine force has much less utility. As noted by Harold Kearsley, submarines have "tremendous potential for wartime employment, but little else."³³ Given its

limited capabilities and operational reach, the MEF will have marginal effectiveness beyond its EEZ and does not provide the TNI-AL the ability to project power regionally.

Within ROI's EEZ, the MEF roadmap describes an extensive list of possible mission sets. Evaluating the capabilities of the MEF to meet these requirements requires an understanding of the perspectives of key maritime stakeholders. There are eleven different agencies, including the TNI-AL, with key roles in maritime security.³⁴ In 2015, the Consortium for Maritime Security conducted a Training Needs Analysis, soliciting assessments from these key maritime players to establish the highest priority maritime security threats.³⁵ In order, the five highest priority threats emerging from the analysis were illegal, unreported, and unregulated (IUU) fishing; piracy; smuggling and trafficking in persons; narcotics trafficking; and terrorism.³⁶ Interestingly, these eleven stakeholders did not describe the threats and challenges posed by external state actors. The security challenges inside ROI's EEZ are significant. IUU fishing is estimated to cost the Indonesian economy \$3 billion per year;³⁷ this amount represents 40% of ROI's total defense budget. Piracy is also an enormous challenge for ROI. Between 2000 and 2014, there was an average of 100 piracy incidents per year in Indonesian waters, the highest by far of any nation in the region.³⁸ In 2017, 20% of global piracy incidents occurred in Indonesian waters.³⁹

Before comparing MEF capabilities to these threats, it is important to understand the TNI-AL's legal authority to address these law enforcement challenges. Although the Indonesian Army does not have the authority to conduct internal security and law enforcement operations, the TNI-AL retains this authority.⁴⁰ Despite US biases toward distinguishing between the responsibilities and authorities of an externally focused navy and an internally focused coast guard, ROI's unique geography and strategic culture drive the TNI-AL to enforce and provide internal maritime security as well as provide defense from external threats.⁴¹ However, while the

TNI-AL has the authority to address these security challenges, it has no direct authority or control over the various non-military organizations that also perform law enforcement functions against this wide array of threats.⁴²

These threats exist both on the open ocean within the 200-mile EEZ boundary as well as the relatively calmer internal waters of the archipelago. This distinction is important because of the required sea-handling characteristics of vessels which need to operate in open-ocean waters. As Harold Kearsley point out, “EEZ patrol ships need to be able to respond proportionately to the threat or situation and simple, visible weaponry, high speed, good sea-keeping and loiter characteristics, maneuverability and hull strength are desirable attributes.”⁴³ Given these required characteristics, the MEF’s fast attack craft and patrol craft are ill-suited to operate on the open ocean of the EEZ. The responsibility to address these law enforcement challenges will fall to ROI's larger frigates and corvettes. Under the MEF construct, ROI will have only 22 vessels suitable for EEZ enforcement operations. Effectively patrolling the nearly three million square km of the EEZ and continental shelf waters with 22 ships is unlikely.⁴⁴ Additionally, employing a highly-capable combatant in patrolling operations represents a misapplication of high-end and expensive combat potential on low-end security challenges.⁴⁵

The MEF’s capability to patrol internal waters is more closely matched with the maritime security threats it will face by relying on 66 patrol craft. However, these patrol craft are well-armed with heavy machine guns and anti-ship cruise missile on certain variants.⁴⁶ While effective for coastal defense against a capable adversary, these highly-armed patrol vessels represent additional wasted capability in conducting law enforcement activities in ROI’s coastal waters. The MEF will have some capability to conduct humanitarian assistance and disaster

relief operations using its amphibious assault ships, as demonstrated by ROI's participation in RIMPAC 2014.⁴⁷

The MEF is designed to cover a wide range of maritime security challenges. While attempting to achieve a balanced force, the MEF includes a significant number of expensive, high-capability platforms. These platforms financially crowd out the low capability platforms ROI needs to meet its internal maritime security requirements. Considering the diversity of threats and challenges the MEF will face beyond Indonesian waters, inside its EEZ, and within its coastal waters, it lacks enough platforms with enough capability to fully support the expansive requirements of the GMF strategy.

REGIONAL COOPERATION AS A STRATEGIC MEANS

In addition to the strategic misalignment of economic means and capabilities in achieving GMF strategic defense objectives, the MEF is also misaligned with the GMF ends of expanding naval diplomacy through increased cooperation with other nations. This strategic misalignment stems from three interconnected and reinforcing factors. First, the procurement of high-end, offensive weapons systems risks military competition with its attendant destabilizing consequences. Second, despite President Widodo's emphasis on maritime border security and sovereignty, the MEF will be limited in its ability to deter Chinese assertiveness in its territorial claims. Third, ROI's desire for greater autonomy and regional leadership will put pressure on the effectiveness of the Association of Southeast Asian Nations (ASEAN) in dealing with regional tensions.

Although most researchers do not characterize the naval modernization occurring across Southeast Asia as a dangerous arms race, there are causes for concern.⁴⁸ To be sure, the TNI-AL

is in desperate need to modernize its obsolete vessels, some of which are over 50 years old.⁴⁹ However, the acquisition of additional submarines and other offensive weapons systems such as anti-ship cruise missiles could send a message to other nations in the region that they need to procure these capabilities as well. Coupled with existing regional tensions (e.g., the ongoing dispute between ROI and Malaysia over the Ambalat Islands), increasing these capabilities across the region could be destabilizing.⁵⁰ As Geoffrey Till and Jane Chan acknowledge, although the risk is not high, the South-East Asia maritime environment is very dynamic, and there remains “the possibility that naval modernization together with existing disputes could have dangerous consequence.”⁵¹

To support the maritime border security and sovereignty elements of the GMF strategy, the MEF would need a sufficiently-strong military capability to deter Chinese assertiveness. Sheldon Simon assesses that the “new ships and aircraft acquired by Southeast Asian armed forces are relatively few in numbers and hardly a match for China's People's Liberation Army's growing air and naval assets.”⁵² Additionally, the TNI-AL has been relatively ineffective in dealing with Chinese fishing in ROI's EEZ.⁵³ For example, in March 2016, a Chinese Coast Guard vessel intentionally hit and freed a Chinese fishing vessel being towed by Indonesian authorities after they had arrested eight Chinese fishermen for illegal fishing.⁵⁴ Following brief public outrage, ROI's foreign minister attempted to dial back the tension with China, stating that “Indonesia is not a claimant state in the South China Sea.”⁵⁵ It is unlikely that the MEF capabilities are going to be effective in deterring Chinese territorial assertiveness given Jakarta's seeming reluctance to push back against Chinese claims, despite President Widodo's emphasis on maritime borders and sovereignty.

The GMF strategy represents an Indonesian desire for increased autonomy and regional leadership that could undermine the potential for ASEAN to manage and resolve regional tensions. Donald Weatherbee describes an ASEAN already challenged by a consensus-driven approach to addressing regional concerns and an “unwillingness of the states to raise the issues to the regional level where theoretically, ASEAN mechanisms for peaceful resolutions are in place.”⁵⁶ Several of Widodo’s advisors have made public statements downplaying the importance of ASEAN and ROI’s leadership role in that organization.⁵⁷ Other Indonesians have said that “ASEAN needs Indonesia more than Indonesia needs ASEAN.”⁵⁸ The MEF requirement to increase domestic production of weapons and platforms is a manifestation of the desire for greater autonomy and less dependence on the other nations. Desired MEF capabilities and the political drive to assume a greater regional leadership role risk undermining the ability of an already challenged ASEAN to help resolve regional issues.

CONCLUSIONS AND RECOMMENDATIONS

ROI’s national leadership has articulated aspirations for an increased leadership role in Southeast Asia, hoping to become a medium regional power. These aspirations are captured in the externally-focused components of the GMF concept, supported by five strategic maritime pillars: reestablishing a maritime culture, developing maritime resources (especially food), improving maritime infrastructure, increasing cooperation with other nations in the maritime domain, and expanding maritime defense forces. Although ROI’s current political climate and recent economic growth provide an environment in which defense modernization is more economically feasible than in the past, the MEF development plans for the TNI-AL are too expensive to be achieved. ROI’s focus on acquiring expensive, high-capability platforms

prevents it from acquiring sufficient numbers of low-capability platforms to meet the GMF's internal maritime security requirements. While the capabilities that would be provided by the MEF (if it could be achieved) might support some elements of the GMF concept's strategic maritime interests, the MEF would be unable to effectively project power beyond its EEZ and would have only limited effectiveness in securing ROI's strategic maritime interests inside its EEZ and territorial and internal waters. Finally, the MEF concept and its associated expansion of naval power coupled with ROI's regional leadership ambitions undermine rather than exploit cooperative multilateral approaches to establishing maritime security. These three issues represent a strategy misalignment between ends (ROI's strategic maritime interests) and means (financial resources, platform capabilities, and regional cooperation).

To resolve this strategic disconnect, the author recommends three independent courses of action. First, the US Government should continue supporting cooperation frameworks (such as ASEAN) to address and reduce tensions in the region. The United States should enhance its legitimacy as a contributor to these efforts by ratifying the United Nations Convention on the Law of the Sea. US diplomatic efforts should try to influence ROI away from actions that could be perceived as being too assertive in its regional leadership aspirations and, instead, reaffirm the importance of multilateral cooperation through information sharing and exercises. Finally, the United States should strengthen economic ties within and beyond Southeast Asia by exploring trade agreements such as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership.

Second, US Indo-Pacific Command should leverage its interagency partnerships to work with Indonesian military and law enforcement agencies to expand on current capacity-building activities. These partnerships should focus on helping ROI implement modern and cost-effective

solutions to improve maritime domain awareness. For example, Global Fishing Watch (a collaboration between corporate and charitable organizations) has been analyzing satellite imagery to detect illegal, unreported, and unregulated fishing.⁵⁹ The cost of obtaining and processing this data has been steadily decreasing while the delay between detecting and reporting violations is becoming small enough that authorities can respond quickly and apprehend the offenders.

Finally, ROI should perform a detailed review of both its force structure plans and its maritime strategy to identify where its force modernization concept is forcing it to accept risk in some mission areas. This review would likely lead to changes in the MEF roadmap to make it more affordable and more capable in addressing the most pressing threats to ROI by calling for more numerous low-capability platforms to address what are mainly law-enforcement challenges. This review should also examine the feasibility and validity of the current GMF strategy. Interestingly, some researchers have opined that, contrary to what is stated in the GMF strategy, ROI might not have regional ambitions beyond economic and infrastructure development inside its EEZ. If this is true, Indonesia should update its GMF strategy to reflect a more accurate set of objectives to help guide force planning. If it does not, it risks squandering the opportunity to implement a naval modernization program that is both achievable and relevant to its strategic goals.

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