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SOUTH-SOUTH SYNERGIES:

A FRAMEWORK FOR INDONESIA SUB-SAHARAN AFRICA COLLABORATION

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Executive Summary

This report explores the evolving relationship between Indonesia and Sub-Saharan Africa, analysing current trade dynamics, challenges, and opportunities for collaboration. Indonesia has maintained diplomatic and economic engagements with Sub-Saharan Africa, but its role has historically been overshadowed by larger Asian economies such as China and India. However, under President Joko Widodo's administration, Indonesia has sought to deepen its economic ties with the region. This shift has resulted in increased trade activities and agreements. Despite Indonesia's strategic pivot towards Sub-Saharan Africa, trade between the two regions remains relatively small, valued at less than $14 billion in 2023, compared to Africa's trade volumes with China ($282 billion) and India ($103 billion). Challenges such as logistical inefficiencies, high trade costs, and limited institutional support hinder Indonesia' s ability to compete with these economic powerhouses. High logistics costs, which account for 21–23% of Indonesia's GDP, exceed those of its ASEAN counterparts, restricting trade competitiveness. Additionally, the absence of strong financial frameworks for large-scale investment has made it difficult for Indonesia to match the extensive infrastructure projects funded by Chinese and Indian investors.

To overcome these barriers and maximize economic engagement, this report outlines four key cooperation avenues:

1. Infrastructure Development. Enhancing transportation connectivity through direct shipping routes, airport development, and public-private partnerships (PPPs) can improve trade efficiency between Indonesia and Sub-Saharan Africa.

2. Healthcare Partnerships. Expanding pharmaceutical and vaccine production collaborations can help both regions address public health challenges. Indonesia has already provided 1.58 million doses of Pentavalent vaccines to Nigeria, setting a precedent for further medical cooperation, including joint medical research and training programs.

3. Trade Facilitation Initiatives. To improve trade efficiency, Indonesia should initiate feasibility studies with regional African trade blocs and align agreements with the African Continental Free Trade Area (AfCFTA). This would reduce tariffs and streamline customs procedures, fostering non-traditional trade expansion in sectors such as spices, pharmaceuticals, and technology.

4. Education and Knowledge Exchange. Strengthening academic and vocational partnerships can support long-term economic cooperation. This includes student exchange programs, scholarships, and joint research initiatives in areas such as agriculture, renewable energy, and maritime studies.

Contextualisation

Indonesia's relationship with Sub-Saharan Africa dates back to the 1955 Asia-Africa Conference in Bandung, which played a key role in establishing relations between postcolonial nations in the Global South (Lusia & Sari, 2023). Historically, Asian economic powerhouses such as China and India have played much greater roles in Sub-Saharan African economic development, but the election of President Jokowi in 2014 signalled a shift in Indonesia's African Foreign Policy, notably launching the Indonesia Africa Forum (IAF) in 2018 (Dorigné-Thomson, 2021). This forum was created as a platform to deepen economic ties between the two regions, resulting in the establishment of strategic partnerships and agreements such as the Preferential Trade Agreements with Mozambique and Tunisia (Dedi Admin, 2024).

Between 2010-14, the majority of Indonesia's fastest growing exports were in Sub-Saharan Africa. Trade relations centre on key industries such as textiles, pharmaceuticals and digital technology, with Indonesia attempting to position itself as a non-traditional strategic trade partner, pushing for market diversification to reduce Sub-Saharan Africa's trade dependencies (Tarrósy, 2016). South Africa has consistently been Indonesia's largest trading partner within the region, although this relationship is characterised by trade in traditional commodities such as palm oil.

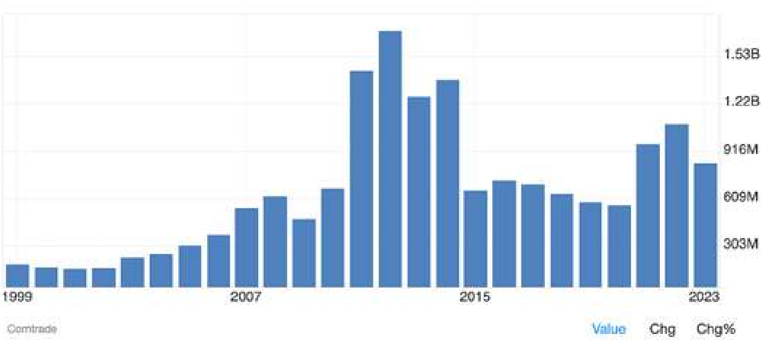

Figure 1. *Indonesia Exports to South Africa (UN Comtrade database via tradingeconomics.com)*

Indonesia Exports to South Africa	Value	Year
Animal, vegetable fats and oils, cleavage products	$390.65M	2023
Paper and paperboard, articles of pulp, paper and board	$65.65M	2023
Machinery, nuclear reactors, boilers	$65.28M	2023
Footwear, gaiters and the like,	$44.79M	2023
Vehicles other than railway, tramway	$43.02M	2023

Figure 1.1 *Indonesia Exports to South Africa in 2023 by Category (UN Comtrade database via tradingeconomics.com)*

The COVID-19 pandemic brought new challenges and opportunities for collaboration, particularly in the healthcare sector, with Indonesia and five African countries being designated as hubs for vaccine technology transfer to treat COVID-19 (WHO, n.d.). In the same vein, Indonesia began investment into vaccine production in Tanzania and Nigeria, signalling a shift to more health-focused partnerships (WTO, 2021). Instability brought by the pandemic caused a trade balance deficit for Indonesia, with $3.8 billion in Nigerian imports (Lusia & Sari, 2023). Despite the economic slowdown, GDP growth has recovered in the African region, with a predicted average growth rate of 4% in 2023 and 2024 (Lusia & Sari, 2023). This trend is a promising indicator for addressing Indonesia's trade deficit and enhancing its export performance. Recent developments suggest that Indonesia is continuing its non-traditional trade strategy, targeting the export of spices and herbs to catch up to Thailand (WTO, 2021).

Although Indonesia has made progress in relations with Sub-Saharan Africa, there is still significant room for growth relative to its Asian counterparts. Indonesia should continue to push its position as a strategic partner and strengthen institutional collaboration, leveraging multilateral frameworks.

By coupling these efforts with deeper cultural and academic ties, Indonesia can enhance its competitiveness and solidify its role as a long-term partner for Sub-Saharan Africa. Nonetheless, several challenges remain to be addressed.

Current Challenges

This section explores the major obstacles in strengthening Indonesia-Sub-Saharan Africa relations through analysis of both historical and anticipated barriers. As shown in the figure below, Indonesia's average economic growth between 2007-16 ranked third highest in the G20, and according to reports by Asian Nikkei and PwC, Indonesia is projected to become the world's fourth largest economy by 2050 (Saputra, 2024). At the 2017 G20 Leaders' Retreat in Hamburg, Indonesian President Joko Widodo expressed support for the G20 Africa Partnership and has encouraged firms to expand relations with emerging countries, such as those in Sub-Saharan Africa (Office of Assistant to Deputy Cabinet Secretary for State Documents & Translation, 2017).

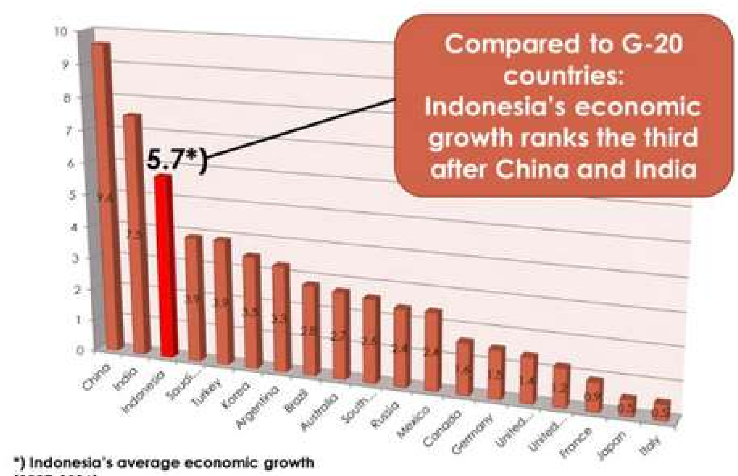

Figure 1.2 *Indonesia's Average Economic Growth, 2007-2016 (Concept Paper "Indonesia-Africa Forum")*

However, despite strong economic performance, previous efforts to strengthen relations with Sub-Saharan Africa have fallen short due to a lack of institutional support and integration. Multilateral frameworks, such as the New Asian African Strategic Partnership (NAASP) faced issues in the form of conflicting priorities between Indonesia and South Africa. As a result, Indonesia shifted its focus to bilateral initiatives such as the Indonesia Africa Forum, securing deals valued at a total of $1.9 billion at its inauguration. However, its position as an independent initiative without alignment to broader institutions such as the Association of Southeast Asian Nations (ASEAN) and the African Union means Indonesia's efforts are often fragmented, limiting their impact.

A prevalent issue in fostering strong South-South relations is a lack of resources for large-scale investment, that restricts developing nations' ability to compete with dominant players such as China and India.

In 2023, Africa's trade with China and India stood at $282 billion and $103 billion respectively. In comparison, Africa-Indonesia trade value reached less than $14 billion, amounting to less than 4% of Indonesia's total trade with the Asia-Pacific region. Indonesia's smaller-scale initiatives struggle to compete with China and India's extensive infrastructure investments and heavily subsidised loans due to a lack of dedicated financial frameworks and established institutional support. Several trade activities with Africa have been funded through initiatives such as the 2015 National Interest Account (NIA) program, but the allocated budget of approximately $96 million has proven insufficient to match the scale of larger global players, even within Asia (Concept Paper "Indonesia – Africa Forum," 2018).

Aside from resource constraints, logistical inefficiencies also restrict Indonesia's competitive potential in the Asia region. High logistics costs, which remain at 21-23% of GDP, significantly exceed those of its ASEAN counterparts, restricting the cost competitiveness of Indonesian exports in Sub-Saharan African markets (Gupta & Ratana, 2023). Additionally, high non-tariff barriers, including complex customs procedures (up to seven days) and restrictive cabotage laws, hinder the efficiency of logistics networks that could accommodate higher trade volume.

These challenges underscore the structural barriers and disparity in policy frameworks that constrain Indonesia's ability to strengthen relations with Sub-Saharan Africa as efficiently as other economically prosperous Asian nations.

Cooperation Avenues

The second Indonesia–Africa Forum also addressed the strategic importance of a partnership between the two regions (Subianto, 2024).

Indonesia and Sub-Saharan Africa have significant potential to enhance their trade and investment relationships, positioning Indonesia as a strategic non-traditional trade partner. By focusing on several key areas, both regions can foster collaboration that benefits their economies and societies.

1.1 Infrastructure Development

One of the most critical areas for cooperation is infrastructure development. Establishing direct shipping and air routes would facilitate trade and tourism, enhancing connectivity between Indonesia and African nations. To achieve this, joint ventures could be formed to develop transportation infrastructure, such as ports and airports. Public-private partnerships (PPPs) play a vital role in mobilising resources and expertise from both regions, ensuring sustainable development of transportation networks that support economic growth (M&G Africa Reporter, 2016). The Second Niger Bridge in Nigeria has proven to be a great exemplary success, which improves connectivity across the River Niger, linking Asaba and Onitsha. Similarly, there have been efforts to redevelop the Lagos-Ibadan expressway and integrated railway systems (Nigeria Sovereign Investment Authority, 2023).

1.2 Healthcare Partnerships

Indonesia's provision of 1,580,000 doses of Pentavalent vaccine to Nigeria in 2023 sets a precedent for healthcare to be another avenue for collaboration (World Bank Group, 2024). Joint medical research programs focusing on tropical diseases that affect both regions could be developed, involving universities and research institutions from Indonesia and Africa working together to create new treatments or prevention strategies. Additionally, training initiatives could be established for African healthcare professionals to receive training in Indonesian medical facilities, particularly in areas like tropical medicine and public health management. Expanding existing vaccine donation initiatives, like Indonesia's provision of Pentavalent vaccines to Nigeria, would further strengthen healthcare ties by addressing critical health needs in African countries.

1.3 Development Cooperation

Development cooperation is essential for fostering long-term partnerships. Building on Indonesia's experience with Triangular South-South Cooperation programs, both regions could involve third- party countries or organizations to enhance capacity building in Africa. This approach could include technical assistance in agriculture, health, and energy sectors (Naylor, 2016). Furthermore, Indonesia has already provided development assistance to 23 out of 54 African countries in areas such as food security, healthcare improvements, and renewable energy projects (Katriana, Yashinta Difa, 2024). Continued support in these areas would be mutually beneficial.

1.4 Education Cooperation

Education cooperation is another vital component of strengthening ties between Indonesia and Sub-Saharan Africa. Establishing student exchange programs between Indonesian and African universities would foster cultural understanding and academic collaboration in fields such as agriculture, engineering, and environmental studies. Joint research initiatives addressing mutual interests—like sustainable agricultural practices or maritime studies—could leverage the unique geographical advantages of both regions. They could further promote cultural exchange centres such as the African Indonesian Center of Studies that has been established in an Indonesian university, which also advances academic collaboration (Heryadi et al., 2023). Additionally, offering scholarships for African students to study in Indonesia, as well as scholarships for Indonesian students to study in Africa would promote educational ties, facilitating knowledge exchange and laying the groundwork for future economic collaboration through academia.

1.5 Trade Facilitation Initiatives

To further enhance trade relations, organising trade missions and business forums would bring together Indonesian businesses with their African counterparts to explore opportunities across various sectors like agriculture, manufacturing, and technology. Existing initiatives such as preferential trade agreements (PTAs) that Indonesia has signed with four African countries since 2017, and regional organisations such as Economic Community of West African States (ECOWAS), could be further expanded to strengthen trade relationships of African countries with new economic partners (WTO, 2021). Collaboration between investment promotion agencies from both regions could streamline processes for Indonesian companies looking to invest in Africa and vice versa.

Recommendations

Presented here are recommendations to further and deepen these existing ties, to the benefit of both nations. This report advocates for the continuation of economic diplomacy through reduction of trade barriers and infrastructure, and enhanced education exchange.

2.1 Utilise existing economic institutions to finance infrastructure developments.

Forums for cooperation and discussion already exist between Indonesia and Sub-Saharan Africa. In September of 2024, the 2nd Indonesian-African Forum occurred, in which President-Elect Prabowo outlined his vision for the future. Marking a distinct departure from his predecessor Widodo, Prabowo has a greater interest in engaging Indonesia geopolitically. His focus with Africa is to overcome 'the struggle we face today...of economic development' (Subianto, 2024).

Investment in Sub-Saharan Africa is related to several benefits. Firstly, it will facilitate economic growth and trade diversification for both regions, as ASEAN countries gain access to Africa's constantly growing consumer base and supply of raw materials. Indonesia alone imported over $6.5 billion of Sub-Saharan African raw materials in 2022, a year in which trade was heavily affected by COVID-19 (World Bank, 2022). Secondly, it strengthens South-South relations by offering a 'third way'. Instead of being funded by traditional Western or Chinese investment, which would influence the development path of Sub-Saharan Africa, a partnership with Indonesia would be more culturally attuned due to comparable historical experiences of decolonisation.

However, Indonesia alone cannot match the economic power of its continental counterparts such as China or India. In this way, 'high cost of exports' and 'high costs of transportation to Africa' prove problematic (Lusia & Sari, 2023). There are several ways in which these barriers can be dealt with. Some literature has called for a coordinated reduction of tariffs, which will be covered later in the report (Lusia & Sari, 2023). Overcoming these initial barriers can be achieved by utilising Indonesia's relations with the ASEAN nations, through blended finance initiatives. By coordinating these economically significant countries under Indonesian leadership, the required capital can be raised to finance infrastructure investment in Sub- Saharan Africa. With the backing of its ASEAN partners, Indonesia could lead the charge on a new chapter of economic partnerships between these increasingly influential regions.

2.2 Expand trade and reduce barriers

This report recommends that an initial joint feasibility study is produced by Indonesia and various regional African blocs to identify trade complementarities and priority sectors. Following this, tailored trade agreements can be created, optimising the specialties of participating nations. From here, align these agreements with the African Continental Free Trade Area (AfCFTA) to ensure market access. In doing this, trade and customs procedures between Indonesia and Sub-Saharan Africa will be standardised and made more efficient.

Understanding Africa's role as a potential importer began in 2023 when ex-president Widodo travelled to several Sub-Saharan African countries. The purpose of this visit was to focus on 'expanding export markets, increasing investments, and promoting collaboration in energy, mineral resources, health, and strategic industries.' (Muhamad & Bulandari, 2024). In commissioning a report building upon the information gathered during Widodo's visit, a broader understanding of the African import market can be synthesised. Furthermore, beginning this process will aid Indonesia's interest in tapping into Africa's 'vast potential as a promising non-traditional market.' (Muhamad & Bulandari, 2024).

Once trade agreements with regional blocs are finalised, the AfCFTA can be adopted as a scaling mechanism to broaden the scope of trade between the regions and maximise economic benefits. To explain, AfCFTA will expand the market access beyond initial bloc agreements after regional trade agreements with blocs provide initial entry. Due to its scope, encompassing 54 African countries, Indonesia will not have to consider individual countries' tariff agreements, rather pay a lump sum which is then distributed according to AfCFTA regulations (African Union, 2018). Hence, Indonesia can use these bloc agreements as stepping stones to extend preferential terms of trade to Sub-Saharan Africa.

It is necessary that due consideration is given to the economic cooperation which can be achieved in the context of expanded trade opportunities and reduction of economic barriers in the form of tariffs.

2.3 Develop key infrastructure and healthcare initiatives

Sub-Saharan Africa faces an energy deficit, with over 600 million people lacking access to electricity (Baskaran & Coste, 2024). Energy infrastructure, therefore, should be a primary recipient of FDI. Focusing on renewable energy projects, electrification grids, and transmissions will provide suitable infrastructure to catalyse industrialisation, and support growth of SMEs. Therefore, this report recommends that investment is mobilised through Public-Private Partnerships (PPPs) to implement capacity-building programs which will support local industries and enhance healthcare access.

Steps are already being made in the right direction. November 28th of 2024 marked the establishment of East Africa's first ICU facility in Somalia, implemented through collaboration of Indonesia AID amongst others (Saputra, 2024). As is occurring currently, this report calls for 'Indonesia AID's expanding presence in Africa' to maintain its expansion for 'increased technical cooperation and knowledge sharing between the regions (Saputra, 2024).

On the energy front, Pertamina New and Renewable Energy (Pertamina NRE), a unit of the Indonesian state energy firm, signed an agreement with Guma Africa Group to cooperate on a natural gas project 'designed at analysing the potential development of a gas-to-power project in South Africa' (Reuters, 2024). This provides a model for promoting energy infrastructure throughout Sub-Saharan Africa. Using the project's technical and financial framework, similar initiatives in other Sub-Saharan African nations with abundant natural gas reserves can be replicated. Furthermore, if partnerships were formed with local energy companies, expertise can be transferred in gas processing and power generation between Indonesian and African firms. Certainly, Prabowo is behind the idea, stating that 'it is high time to expand and deepen traditional trade partnerships in areas such as mining, oil, and gas' (Subianto, 2024).

On healthcare, Indonesia has a substantial pharmaceutical industry, specialising in vaccine production and generic drugs. This offers a foundation for enhancing healthcare access in Sub-Saharan Africa. In doing so, multiple avenues become apparent, two of which are recommended here.

Establishing local manufacturing facilities in Sub-Saharan Africa will reduce reliance on expensive imports and lowers the costs of production and distribution.

Partnering with African governments and investing through PPP, costs and risk are shared with the establishment of such facilities. Research would have to be conducted to strategically choose the location of pharmaceutical manufacturing plants in which regulations are most favourable and proximate to raw materials. An offshoot of this method is technological transfer and boosting employment in Sub-Saharan African nations, during both the building and day-to-day operations.

The other avenue, capitalising on Indonesia's expertise, is vaccine collaboration programs. This report recommends partnering with African pharmaceutical companies and governments to set up vaccine production plants, specifically for diseases prevalent in Sub-Saharan Africa such as yellow fever, malaria, and meningitis (Moyo et al., 2023).

2.4 Enhance knowledge exchange

This report recommends that programs are developed to foster knowledge exchange and capacity building. This report promotes student exchanges, scholarships, and joint research programs to build cultural and academic ties, with a focus on areas like agriculture and maritime studies. These initiatives benefit both regions by fostering innovation and addressing shared challenges.

Bilateral agreements such as student exchange programs can lay the groundwork for future cooperation and long-term technological innovation by investing in the youth. Prabowo certainly has motivations to invest in the people, as 'they are our greatest resource and by prioritising vocational training, higher education, and knowledge exchange programs, we can equip our young people' (Subianto, 2024). To achieve this, student exchange programs can be initiated through Memoranda of Understanding (MoUs) between Indonesian and African universities, prioritizing fields such as agricultural technology, fisheries management, and coastal sustainability.

Another method is expanding existing Indonesian scholarship initiatives to African students. This includes offering scholarships for graduate programs at Indonesian universities, funded by Indonesian companies operating in Africa as part of Corporate Social Responsibility programs (Putri, 2024). The consequences of this are multifaceted. Capacity building, of course, is the primary aim, and scholarships will equip Sub-Saharan African students access to higher education, building expertise in sectors critical to development. Additionally, it will strengthen Indonesia's reputation as a hub for education and cultivate a future workforce familiar with Indonesian technologies and methods. Lastly, alumni can serve as informal ambassadors, fostering stronger trade and investment relations.

Finally, joint research programs can be another method of knowledge exchange and capacity building. Indonesian institutions and African research centres can work together on areas of mutual interest, such as drought-resistant crops and sustainable aquaculture. Based on a primary study of the options available, the Kenya Agricultural Research Institute (KARI) seem to have aims and specialisations in cogent fields (Kenya Agricultural Research Institute (KARI), 2015). Funding for these bilateral research projects could be co-sponsored by governments and international development organisations, as the research collated will have benefits applicable to countries across the globe.

By enhancing education and knowledge exchange, innovative research in food security and marine resource depletion will be accelerated. Indonesia's experience in tropical agriculture and maritime studies can be applicable to many of Sub-Saharan Africa's ecosystems and biodiversity, sharing the expertise. Long-term benefits of these policies are firstly, stronger diplomatic relations, as academic ties will build trust and mutual respect, laying the foundation for deeper political and economic partnerships. Secondly, greater global influence as collaboration enhances the standing of both regions in addressing critical global challenges such as food security and sustainable development.

Conclusion

Indonesia's relationship with Sub-Saharan Africa holds great promise but is constrained by several gaps that require intervention. Key challenges include limited institutional support, resource constraints, and high logistical costs that undermine Indonesia's competitiveness relative to Asian powerhouses like China and India. These structural inefficiencies, coupled with fragmented initiatives, have impeded Indonesia's ability to capitalise on the potential of its partnerships with Sub-Saharan Africa.

Addressing these gaps necessitates leveraging avenues of cooperation such as infrastructure development, healthcare partnerships, and education exchanges. For instance, the lack of direct connectivity between Indonesia and Sub-Saharan Africa can be tackled through public-private partnerships to develop ports, railways, and air routes that facilitate trade and tourism. Similarly, Indonesia's established pharmaceutical industry presents opportunities for joint vaccine production and healthcare initiatives, while academic collaborations, such as student exchange programs and joint research projects, can foster innovation and build long-term cultural and economic ties.

To bridge these gaps and utilise cooperation avenues effectively, this report recommends scaling infrastructure investment through ASEAN-blended finance initiatives, standardising trade agreements via the AfCFTA framework, and expanding education and healthcare partnerships. By prioritising tariff reduction, fostering knowledge exchange, and investing in local manufacturing and renewable energy projects, Indonesia can position itself as a strategic partner to Sub-Saharan Africa. Through these measures, Indonesia can strengthen South-South relations and achieve mutual economic growth, while offering Sub-Saharan Africa an alternative model of partnership rooted in shared histories and sustainable development.

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