

Market Intelligence Brief Indonesia

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1 Executive Summary

Spread across 17,000 islands, Indonesia is a highly diverse country, with over 300 ethnic groups, over 700 languages and six recognised religions. As Southeast Asia's largest economy, it is home to the ASEAN Secretariat and has experienced fast-paced economic growth since overcoming the Asian financial crisis of the late 1990s. This has enabled the country to make significant strides in terms of poverty reduction, cutting the poverty rate by more than half since 1999, to under 10 percent in 2022.

However, despite the strong progress on poverty, the benefits of rapid economic growth in Indonesia over recent decades have not been shared equally across the country, with wealth inequality rising sharply. Furthermore, in 2022, Indonesia's GDP per capita was US\$4,770 (in nominal terms), which was considerably lower than in the likes of Thailand (US\$6,910), Malaysia (US\$11,970) and China (US\$12,580).

Strong GDP growth was recorded in 2022 and has been sustained in 2023 so far, but the near-term outlook for the Indonesian economy in 2024 is slightly weaker due to higher interest rates and the subdued global economic outlook. However, the medium and long-term outlook remain bright due to the country's large population and competitive cost base. Indonesia is the third most populous country in Asia and is the world's fourth most populous country, with a population of around 275m as of 2022, only behind China, India and the US. Population growth is expected to continue for decades to come, albeit at a slowing rate, with the student age (15-29) population expected to reach 68.6m by 2030.

Indonesia's domestic education system has expanded significantly over recent years, with participation rates increasing sharply. However, quality remains a key challenge, with Indonesia's performance across reading, mathematics and science amongst the weakest of the participating countries in the latest Programme for International Student Assessment (PISA) results from 2018. Lack of educational resources has been cited as a key issue, which the Indonesian government is seeking to address through allocating 20 per cent of its budget to the education sector in recent years. Looking at the higher education sector specifically, participation has increased significantly over the last couple of decades, with the gross tertiary enrolment ratio rising from 15 per cent in 2000, to 24 per cent by 2010 and further to 43 per cent by 2022 according to UNESCO. However, there remains a significant urban-rural divide, with the urban population twice as likely to participate in higher education compared to the rural population.

According to estimates from UNESCO, approximately 59,000 Indonesian students travelled abroad to study at the higher education level in 2021, making it Southeast Asia's second largest outbound international student market, only behind Vietnam, and larger than the likes of Malaysia, Thailand, the Philippines and Singapore. The volume of outbound students has grown by an average of 4 per cent per year over the last decade, from around 37,000 in 2010 to 59,000 in 2021. The most popular destination countries for Indonesian students include Australia, Malaysia, the US, the UK and Germany, while other East Asian destinations, including South Korea and China are also popular options due to their affordability and proximity. Indeed, the leading English-speaking destinations are most popular amongst scholarship funded students, which account for around 10 per cent of Indonesian outbound students.

Looking at the UK's recruitment of Indonesian international students over the last decade, Indonesia has primarily been a postgraduate market for UK HEIs, with around two thirds of enrolments being at the postgraduate level up until 2016/17. Since then, the postgraduate share has been declining and by 2021/22 had fallen to around 50 per cent.

In terms of the volume of Indonesian students at UK HEIs, after several consecutive years of growth up until 2016/17 when the total number of Indonesian students had risen to almost 4,000, growth trends over recent years have been less consistent. In the 2017/18 academic year, Indonesian student numbers declined by 13 per cent. In the following year, student numbers held steady at around 3,400 before rebounding by 10 per cent in 2019/20. However, a further decline of around 9 per cent was recorded in the 2020/21 academic year as the Covid-19 pandemic weighed on student mobility. Encouragingly, in 2021/22, both the undergraduate and postgraduate markets recovered strongly, with the total number of Indonesian students growing by 20 per cent and rising above the 4,000 mark for the first time on record.

Looking ahead, UK study visa issuances to Indonesian students in 2022 grew by 13 per cent compared to 2021, suggesting further robust growth in Indonesian international student numbers in the 2022/23 academic year. In fact, UK study visa issuance to Indonesia was 25 per cent above 2019 levels in 2022, which compares favourably to other leading Southeast Asian markets including Malaysia, Singapore, Thailand and Vietnam where UK study visa issuance has not yet recovered to pre-pandemic levels.

Despite the wider Asia region being the UK's leading TNE and distance learning market, Indonesia is not currently a major market for the UK, with just 970 TNE and distance learning students in the 2021/22 academic year. This compares to much higher student numbers in other Southeast Asian countries such as Malaysia (47,400), Singapore (27,970) and Vietnam (7,120). At present, the UK has no branch campuses in Indonesia, with distance, flexible and distributed learning the primary mode of provision, accounting for around two thirds of students in the 2020/21 academic year. However, although the TNE market in Indonesia is currently under-developed relative to other countries in the region, given the country's young population, fast-growing economy and rapidly increasing tertiary enrolment rates, Indonesia is a market with significant potential for future growth. The Indonesian government is keen to improve the quality of the country's higher education and it sees global collaboration as a means by which to achieve this and is actively encouraging international universities to set up in the country, according to guidelines set out in 2018.

2 Introduction

This report was produced by the British Council's *Insight and Engagement* team with external research support provided by Oxford Economics.^[1] This report is designed to provide UK education institutions with unparalleled data, insight and analysis to support their international education strategies, recruitment activities and partnership development work. The report is also targeted at a UK and Indonesian policy maker audience, by highlighting opportunities and barriers to education and research cooperation that exist between the two countries.

Using the latest data from the most reliable sources, this Market Intelligence Brief represents a window onto Indonesia's education system and student population, as well as the economic and demographic factors, and policy priorities and developments that shape the country's international education outlook. The report examines various aspects related to the internationalisation of Indonesia's education system – including student mobility, transnational education programmes and research collaboration – and also highlights national level education projects and partnerships between the UK and Indonesia.

The information contained in this report is based primarily on desk-based research and data analysis, supplemented with insight and context provided by British Council colleagues on the ground in Indonesia.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to **Jazreel Goh, Head of East Asia Education Insight Hub** at email Jazreel.goh@britishcouncil.org

^[1] www.oxfordeconomics.com/

3 Macro Environment

3.1 People

Indonesia is the third most populous country in Asia and is the world's fourth most populous country, with a population of around 275m as of 2022, only behind China, India and the US. In common with the wider regional trend, population growth has slowed considerably over the last few decades, down to 0.6 per cent in 2022 from much stronger rates of around 1.4 per cent per year in the early 2000s. The slowdown in population growth has been driven by the government's efforts to lower the country's fertility rate to 2.1 children per woman by 2025, which would flatten population growth amid concerns that overcrowding could mean fewer job opportunities and strains on public services. Indonesia's efforts to reduce the pace of population growth are in stark contrast with regional neighbours, especially in rapidly ageing Thailand and Singapore.¹

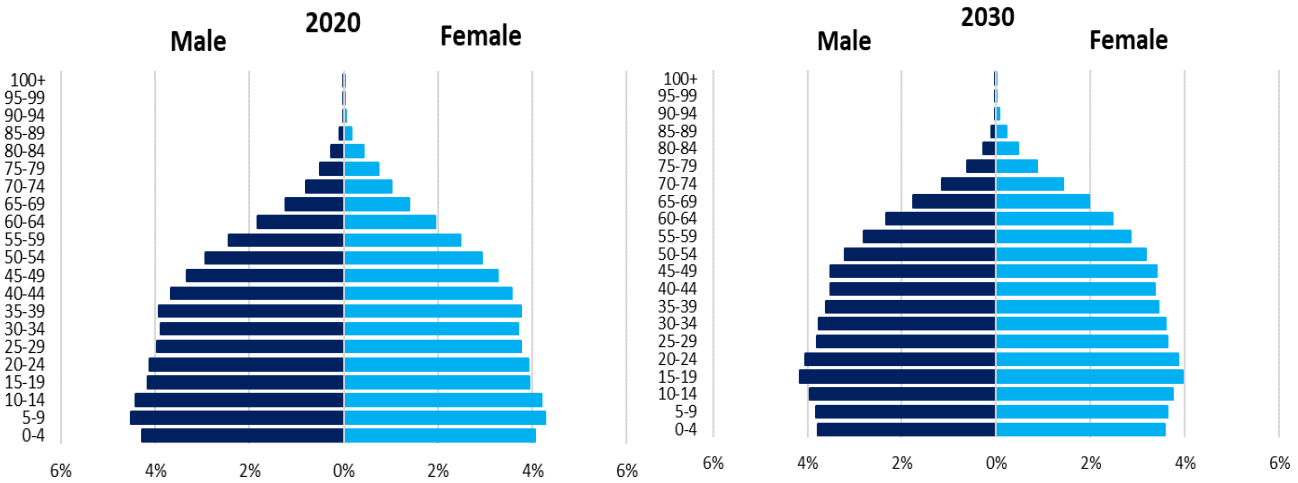
Looking ahead, according to the UN's projections, Indonesia's population is expected to continue to grow, albeit at a slowing rate, for decades to come. The population is projected to reach 292m by 2030 and 317m by 2050.

Alongside the slowing rate of population growth, the age profile of the Indonesian population is expected to gradually transition in the years ahead as the population ages. In 2020, the 0-14 age group accounted for 26 per cent of the total population, equivalent to just over one in every four of the population. By 2030, this is expected to fall to around 22 per cent. Over the same period, the 65+ population share is expected to rise from 7 per cent to 9 per cent.² Nevertheless, Indonesia will continue to have one of the most youthful populations in South East Asia, with 16 per cent of the population being in the 15-24 age group in 2030 – higher than Malaysia, Thailand or Vietnam, although still a somewhat lower proportion than the Philippines.

¹ Why Indonesia wants to put a lid on baby boom, *South China Morning Post*, 2021, www.scmp.com/news/asia/southeast-asia/article/3128098/why-indonesia-wants-put-lid-baby-boom-while-asia-tries

² World Population Prospects, *United Nations Population Division*, 2022, <https://population.un.org/wpp/>

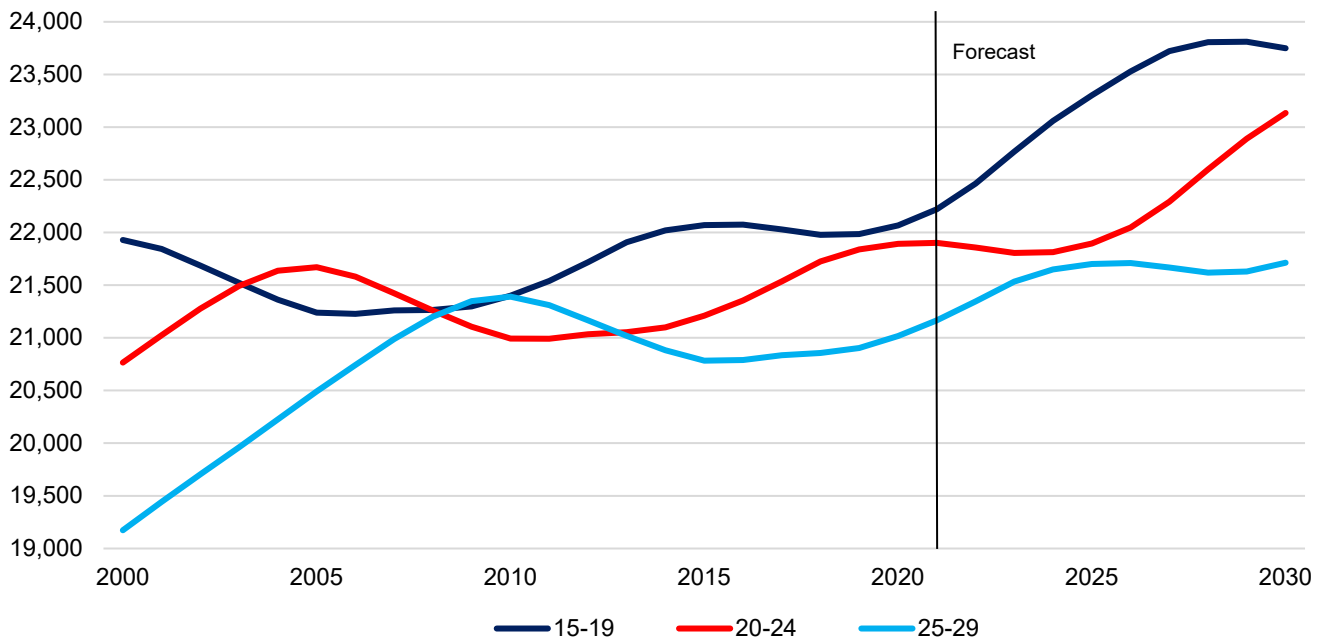
Figure 1: Indonesia's population pyramid, 2020 and 2030



Source: UN Population Division

Looking specifically at the population age bands of interest to UK HEIs, growth trends have varied considerably over the course of the last two decades, with periods of strong growth and decline seen in each of the age bands during the period. However, in aggregate terms, the student age population (15-29) grew from 61.9m in 2000 to 65.3m in 2021. By 2030, further growth is expected, with the student age population expected to reach 68.6m, primarily driven by growth in the 15-19 and 20-24 age bands.

Figure 2: Indonesia's student age population (000s)



Source: UN Population Division

According to the UN, around 58 per cent of the Indonesian population live in urban areas at present. This is above the Southeast Asia average of 53 per cent and is a reflection of Indonesia's fast-growing cities that increasingly offer greater employment opportunities than the rural regions of the country. The urbanisation rate is projected to rise to 63 per cent by 2030 and to 73 per cent by 2050, with Indonesia's rate of urbanisation expected to remain above the regional average in future. More than half of the Indonesian population lives on the island of Java where the country's three most populous cities are located, which are Jakarta (11m), Surabaya (3m), and Bekasi (3m).³

The largest religious denomination in Indonesia is Islam, with just under 87 per cent of the population identifying as Muslim. Christianity represents the second-largest religious group at around 11 per cent, followed by Hinduism (2 per cent) and Buddhism and Confucianism (both below 1 per cent). The high fertility rate of the Muslim population compared to other religious groups has been a contributing factor in the country's high population growth over recent decades.⁴

As an ethnically diverse country, Indonesia is home to more than 700 languages. Its official language, Bahasa Indonesia, is spoken by over 94 per cent of the population but is the primary language of only one fifth of the population. Javanese – a local dialect – is the largest primary language in Indonesia (32 per cent), followed by Indonesian (20 per cent) and Sundanese (15 per cent). While less common, English and Dutch are also spoken across Indonesia.⁵

According to the English First (EF) English Proficiency Index, Indonesia ranks 5th out of 8 South-East Asian countries on English proficiency, placing it in the 'low proficiency' band. Its global ranking, which currently stands at 79th out of 113 countries, has consistently fallen since 2013, which may be attributed to the policy of ending mandatory English classes in primary schools in an attempt to reverse falling standards in Bahasa Indonesia.⁶

3.2 Economy

Indonesia is the largest economy in Southeast Asia and has recorded impressive economic growth since overcoming the Asian financial crisis of the late 1990s. This has enabled the country to make significant strides in terms of poverty reduction, cutting the poverty rate by more than half since 1999, to under 10 per cent in 2019 before the Covid-19 pandemic hit, and again in 2022 after a brief uptick in 2021. It is the world's largest exporter of palm oil, with other major exports including coal briquettes, gold, petroleum, natural gas, cars and ferroalloys. Indonesia's largest export market is China, followed by the US, India, Singapore, and Japan.

The largest sector of the Indonesian economy is services, which accounts for around 47 per cent of GDP, followed by the industrial sector (30 per cent) and agriculture (13 per cent). Since 2010,

³ 2020 Population Census, *Statistics Indonesia*, 2020, www.bps.go.id/pressrelease/2021/01/21/1854/hasil-sensus-penduduk-2020.html

⁴ Population Data by Religion and Province, *Indonesian Ministry of Religion*, 2022, <https://web.archive.org/web/20200903221250/https://data.kemenag.go.id/agamashboard/statistik/umat>

⁵ Indonesian language map, *Translators without Borders*, 2020, <https://translatorswithoutborders.org/wp-content/uploads/2020/04/Indonesian-language-map.pdf>

⁶ English Proficiency Index, *English First*, 2021, www.ef.com/wwen/eipi/regions/asia/indonesia/

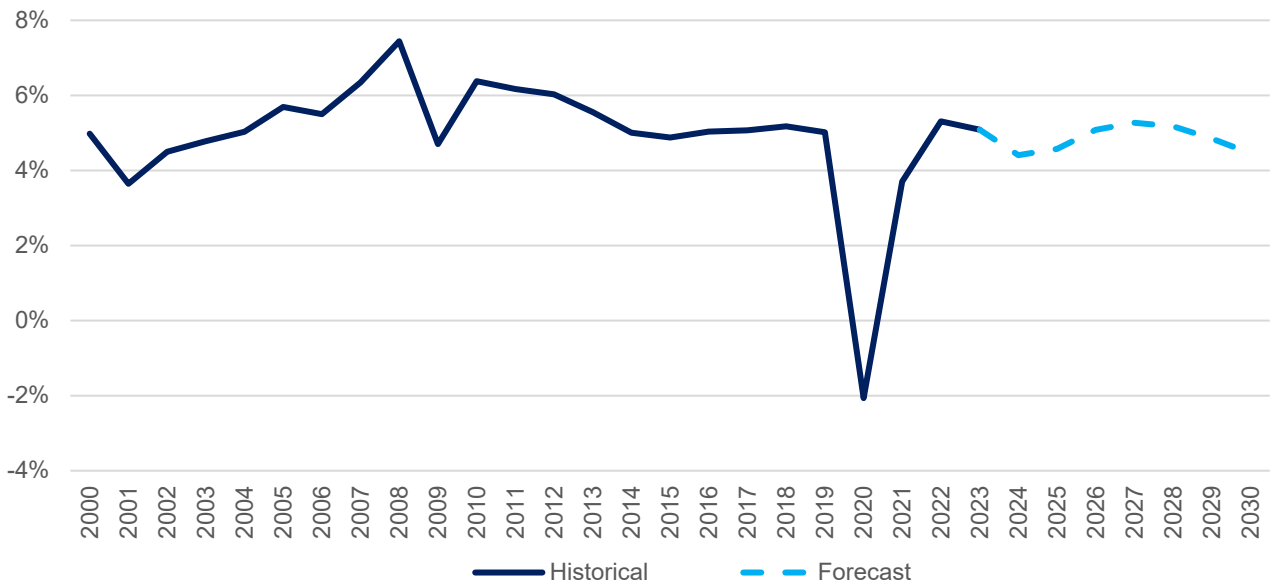
the contribution of services to GDP has grown by around 5 percentage points at the expense of industry which has fallen by almost 4 percentage points, owing to strong growth in the information and communication and financial services sectors.⁷ Meanwhile, the agricultural sector remains vital for large parts of the rural economy, where subsistence and smallholder farming and fishing are the major sources of income. In the past decade, the sector's contribution to GDP has remained largely flat at around 13 per cent, and in 2022 the sector accounted for around 29 per cent of total employment in the country.

The Covid-19 pandemic put a halt to more than 20 years of sustained annual economic growth in Indonesia, with the economy contracting by around 2 per cent in 2020. Despite outbreaks of the Delta and Omicron variants in 2021, an effective vaccine programme enabled the economy to remain relatively more open than in 2020, with growth of around 3.7 per cent recorded for the year, enabling GDP to return to pre-pandemic levels by the end of the year. By contrast, in the labour market, the unemployment rate rose to 6.8 per cent in 2020, which was the highest rate seen in a decade. Despite consistent declines in the rate of unemployment since, the rate remains considerably above the pre-pandemic level and is not expected to return to 5 per cent until 2025.

Strong GDP growth of around 5.3 per cent was recorded in 2022 overall and the outlook for 2023 remains robust, with Oxford Economics expecting growth for the year to come in at around 5.1 per cent, with strong consumer spending growth supporting activity in the domestic economy. Growth is expected to slow to around 4.4 per cent in 2024 due to tighter monetary policy and the expected global economic slowdown. However, the medium and long-term outlook for the Indonesian economy remains bright. Indeed, the Indonesian economy has huge potential for growth due to its natural endowments, large population and regionally competitive wage levels. Its natural resources are mostly oil, natural gas, and coal. It also has some gold, silver, nickel, and bauxite.

⁷ Distribution of GDP by business field, *Indonesia Statistics*, 2022, www.bps.go.id/

Figure 3: Indonesia's real GDP growth



Source: Haver Analytics / Oxford Economics

Despite its strong and consistent rate of economic growth over recent decades, Indonesia remains underdeveloped compared with its regional neighbours. In 2022, Indonesia's GDP per capita was US\$4,770 (in nominal terms), which was considerably lower than in the likes of Thailand (US\$6,910), Malaysia (US\$11,970) and China (US\$12,580).⁸ Still, Indonesia's rapid economic growth over the last 20 years has brought about widening inequality, against the trend seen in regional peers, with its Gini coefficient rising from a low of 29.5 percent in 2000 to a high of 40.8 percent in 2013, before declining to 38 percent in 2022, noting that this is still 8.5 percentage points higher than in 2000.⁹

Over the course of the last decade, the Indonesian rupiah has depreciated by more than 50 per cent against the US dollar, the global benchmark currency and by around 25 per cent against the British pound. The weakness of the Rupiah has been spurred by a current account deficit and external debt levels which compare unfavourably to many other Asian markets. In the last year, the rupiah has depreciated beyond the psychological 15,000 per US dollar mark, a level which was only reached in the past during the Asian financial crisis of the late 1990s and during the early stages of the Covid-19 pandemic in 2020. The rupiah has also depreciated against the pound over the past year following the pound's recovery. Recent interest rate hikes by Bank Indonesia have been designed to support the rupiah, but higher-for-longer interest rates in the advanced economies are exerting downward pressures on Asian EM currencies in general and the downward trend in the rupiah is expected to persist in the medium term. From a student mobility perspective, the persistent depreciation of the rupiah has significantly added to the cost

⁸ Inequality in Indonesia: millions kept in poverty, *Oxfam*, 2017, www.oxfam.org/en/inequality-indonesia-millions-kept-poverty#:~:text=It%20is%20now%20the%20sixth,growth%20and%20threatening%20social%20cohesion.

⁹ Gini index – Indonesia, *World Bank*, 2022, <https://data.worldbank.org/indicator/SI.POV.GINI?locations=ID>

of international study for Indonesian students in recent years, particularly for those headed to the US.

3.3 Government and education policy

The Republic of Indonesia was declared in 1945 and the constitution invests most of the power in the executive branch of the government, particularly in the president, who is assisted by a vice president and a cabinet.

The legislative branch is called the People's Consultative Assembly, a bicameral chamber consisting of the People's Representative Council and the Regional Representative Council. The People's Council consists of 560 members elected in general elections through a proportional representation system. It is responsible for drafting and passing laws, produces the annual budget and oversees general political affairs. The Regional Council has 132 members, four elected from each province, and deals with laws and matters on a regional and non-partisan basis.¹⁰

Indonesia's current leader is President Joko Widodo, known also as Jokowi. He assumed office as the seventh President of Indonesia in October 2014. Since becoming leader, Widodo has favoured 'big tent' coalitions, bringing political rivals into the cabinet which the government argues has led to the political stability that has underpinned Indonesia's growing foreign investment inflows, enabling the government to expand Indonesia's infrastructure on an unprecedented scale. This includes plans to move Indonesia's capital to the island of Borneo.¹¹

While the Indonesian education system has undergone a policy of decentralisation in the past two decades, the system is still centrally directed by the Ministry of Education, Culture, Research and Technology (MOECRT) which holds responsibilities for curricula, the hiring of teachers and national examinations. The Ministry of Religious Affairs (MORA) also oversees religious education, with around 16 per cent of total schools classified under its remit.¹²

School education was decentralised after the Suharto Government and now relies on more than 500 local district administrations. Because of this, education policy can vary regionally. The World Bank has stated that the lack of tangible improvements in education outcomes in Indonesia, despite increased education spending, has been due to poor co-ordination between sub-national governments in aligning to education policy initiatives at the national level.¹³

School closures during the Covid-19 pandemic have caused a significant loss of learning, particularly among students from disadvantaged backgrounds, with the World Bank forecasting a likely 16-point decline in Indonesia's PISA reading scores among 15-year-old students. A Learning Recovery Task Force was set up in 2021 to identify actions to address education losses from the pandemic.¹⁴ While the pandemic accelerated the adoption of digital learning, this has

¹⁰ General Political Outline of Indonesia, *Indonesia Investments*, 2022, www.indonesia-investments.com/culture/politics/general-political-outline/item385

¹¹ Indonesia's unexpected success story, *Financial Times*, 2022, www.ft.com/content/f179df5b-1dc7-46f4-88dc-97ddfe1d2fe4

¹² Statistical Yearbook of Indonesia, *Statistics Indonesia*, 2022, www.bps.go.id/publication/

¹³ Revealing How Indonesia's Subnational Governments Spend Their Money On Education, *World Bank*, 2020, <http://documents1.worldbank.org/curated/en/487071605565796167/pdf/Revealing-How-Indonesia-s-Subnational-Governments-Spend-Their-Money-on-Education.pdf>

¹⁴ UNICEF calls for urgent action to address learning crisis, *UNICEF*, 2022, www.unicef.org/indonesia/press-releases/children-indonesia-return-school-unicef-calls-urgent-action-address-learning-crisis

been at the expense of 61m Indonesians who do not have internet access and are at risk of being left behind.¹⁵

The Covid-19 pandemic also presented an opportunity to push ahead with reforms to the national curriculum which in the past had failed due to political opposition. Traditional examinations were replaced with the Minimum Competency Assessment (AKM) in 2021, which places more of an emphasis on numeracy and literacy skills compared to the previous subject-based tests and follows the form of international assessment standards such as those carried out by PISA.¹⁶

Indonesia's National Medium Term Development Plan 2020–24 seeks to address several strategic issues related to developing the country's human capital, and in particular, its higher education system. The Plan seeks to increase the sophistication and quality of teaching at universities, aiming to increase the number of HEIs that are accredited 'A (very good)' from 85 to 225 by 2024, and expand the percentage of lecturers at HEIs with PhD qualifications from 14 per cent to 20 per cent. The latter, however, is a challenging target as it would mean that Indonesia would have to produce on average 2,000 PhD-holders annually between 2020-2024.

Meanwhile, in order to address regional inequalities in the education system, which exist across rural and Eastern regions and are most pronounced at the higher education level, the government is targeting a gross enrolment rate ratio of the poorest to richest quintile of 0.50 in tertiary education, an increase from 0.16 in 2020, meaning that, if achieved, the gross tertiary enrolment ratio for the poorest quintile would rise to about half of the gross tertiary enrolment ratio seen amongst the richest quintile. Overall, the government is targeting a 14 percentage point increase in the gross tertiary enrolment ratio, with the aim of reaching 44 per cent by 2024.¹⁷

Since assuming office for a second term in 2019, President Widodo has made expanding the number of PhD qualifications, through raising the provision of scholarships for PhD-level study, a priority for government. Whilst the Covid-19 pandemic directed some funds away from this aim towards mitigation and recovery efforts, increasing the uptake for PhD scholarships has returned to the government's agenda with the 2023 Budget earmarking 20 per cent of total spending for education.¹⁸ Indonesia already has a reputation for being a large scholarship-funded market for studying abroad, and an increase in the offering and uptake of PhD scholarships will expand the number of potential students who can travel to the UK for study. The provision of government scholarships will likely continue despite the imminent change in government next year with a new President and administration to be instated post General Elections in February 2024,

¹⁵ Covid-19 and education reform in Indonesia, *Devpolicy*, 2022, <https://devpolicy.org/covid-19-and-education-reform-in-indonesia-20220525/#:~:text=A%20new%20competency%2Dbased%20assessment,politically%20fraught%20domains%20in%20Indonesia>

¹⁶ Assessment Kompetensi Minimum (AKM), *Dyatmika*, 2020, <https://dyatmika.org/en/assessment-kompetensi-minimum-akm/>

¹⁷ National Medium Term Development Plan 2020-2024, *Ministry of National Development and Planning*, 2020, https://perpustakaan.bappenas.go.id/e-library/file_upload/koleksi/migrasi-data-publikasi/file/RP_RKP/Dokumen%20RPJMN%202020-2024/Lampiran%201.%20Narasi%20RPJMN%202020-2024.pdf

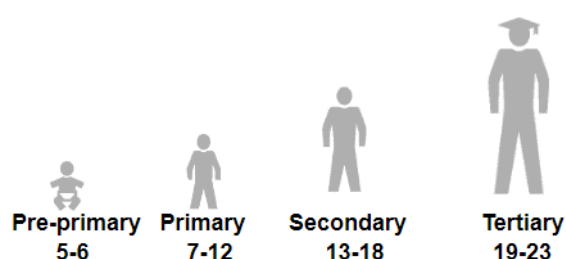
¹⁸ Education Budget Breakdown 2015-2022, *Ministry of Education and Culture*, 2022, www.kemdikbud.go.id/main/tentang-kemdikbud/postur-anggaran-pendidikan

4 Domestic Education Environment

4.1 Overview

The education system in Indonesia comprises four key stages: kindergarten and primary education (grades 1-6), junior secondary education (grades 7-9), senior secondary education (grades 10-12) and higher education. Education is compulsory and is provided free of charge at public schools up to and including junior secondary education, with the official starting age of formal education being seven.¹⁹

Figure 4: Indonesia official school ages by level of education



Source: UNESCO

According to the latest PISA results from 2018, Indonesia performed below the OECD average in reading, mathematics and science. In fact, on each of the three subject areas, Indonesia's performance was amongst the weakest of the participating countries, ranking 71/76, 70/77 and 69/77 in each subject respectively. Contributing to this, Indonesia ranked as one of the highest of the participating countries in terms of reported shortages in education materials (7/78) and a lack of physical infrastructure (2/78).²⁰

In order to alleviate the issues around the lack of educational resources, the Indonesian government mandated 20 per cent of the government budget for education in 2002, a target that was reached in 2015. This commitment dropped slightly between 2017 to 2020, averaging 17.2 per cent,²¹ but in 2021-2022, the government again re-committed 20 per cent of the budget to education, which was the largest allocation in the budget, despite rising fiscal pressures from the Covid-19 pandemic. This allocation by share of budget was maintained in the 2023 and 2024 budget.²²

¹⁹ Education in Indonesia, *WENR*, 2022, <https://wenr.wes.org/2019/03/education-in-indonesia-2#:~:text=Education%20in%20Indonesia%20is%20compulsory,at%20the%20age%20of%20six.>

²⁰ UK Indonesia Partnership Roadmap 2022-2024, *Foreign, Commonwealth and Development Office*, 2022,

www.gov.uk/government/publications/uk-indonesia-partnership-roadmap-2022-to-2024/uk-indonesia-partnership-roadmap-2022-to-2024

²¹ Government expenditure on education, total (% of government expenditure), *World Bank*, 2022,

<https://data.worldbank.org/indicator/SE.XPD.TOTL.GB.ZS>

²² Government earmarks Rp608.3 T for Education in 2023, *Cabinet Secretariat of the Republic of Indonesia*, 2022, <https://setkab.go.id/en/govt-earmarks-rp608-3-t-for-education-in-2023/>

4.2 Early years, primary, secondary

Kindergarten and pre-school education is non-compulsory in Indonesia. However, it has been a priority of consecutive governments, with the gross enrollment rate in pre-primary education rising sharply from 24 per cent in 2002 to 62 per cent in 2018, though enrollment rates are significantly lower in rural and remote island regions. In 2022 the government tabled an education bill which included an article to extend compulsory education to begin from pre-school level; however, the draft bill was defeated in parliament and the government is currently re-writing it.

Elementary education in Indonesia lasts for six years (grades one to six) and the compulsory education age is seven, but in practice most children start formal education by the age of six. The curriculum in Indonesia consists of, among other topics, Pancasila (Indonesian state philosophy), language skills, literacy skills, religious studies, mathematics, history and sciences. However, since 2013 a greater emphasis has been placed on 'moral character education' and creative thinking.²³ This 'Kurikulum 2013' initiative reduced the number of mandatory subjects including IT and English, the latter of which was also removed from compulsory tuition in part to improve standards in Bahasa Indonesia.²⁴ In the 2022/23 academic year there were a total of 149,104 elementary schools across Indonesia, with around 87 per cent of them being public schools.²⁵ Indonesia is home to the largest Islamic education system in the world, overseen by MORA. However, these religious schools have equal obligations as other private and public schools, and thus their basic policies of education are largely in line with those of other Indonesian education institutions, in addition to the teaching of religious studies.

Following elementary education, students in Indonesia attend junior secondary education for three years (grades seven to nine) which concludes with the award of the Certificate of Completion of Junior Secondary School. In 2020, the Indonesian government abolished the National Exams for the graduation of junior secondary education, with assessments now based on continual assessment and school-based exams. Previously, students had to sit for National Exams on three occasions - at the end of elementary education, lower secondary education and upper secondary education.

The external National Exams were viewed as being stress-inducing high-stake tests that encouraged 'measurement-driven teaching' and were found to be ineffective in raising educational outcomes since their introduction in 2003.²⁶ The abolition of the National Exams was in line with the Indonesian government's 2019 'Freedom to Learn' (*Merdeka Belajar*) programme that has aimed to promote greater levels of independent learning and more customised educational environments. Teachers are now encouraged to focus less on exam results and more on independent learning, soft skills and reasoning. However, National Exams remain in place at the end of senior secondary education for admission into university.²⁷

²³ Education in Indonesia, *WENR*, 2022, <https://wenr.wes.org/2019/03/education-in-indonesia-2#:~:text=Education%20in%20Indonesia%20is%20compulsory,at%20the%20age%20of%20six>.

²⁴ Examining the issue of abolishing English tuition in primary school in Indonesia, *Khairul Azmy*, 2020, www.researchgate.net/publication/341869781_EXAMINING_THE_ISSUE_OF_ABOLISHING_ENGLISH_TUITION_IN_PRIMARY_SCHOOL_IN_INDONESIA

²⁵ Education Statistics, *Ministry of Education, Culture, Research and Technology*, 2023 <https://statistik.data.kemdikbud.go.id/>

²⁶ Indonesia seeks to abolish national exams but could end up creating a new rat race, *Channel News Asia*, 2020, www.channelnewsasia.com/commentary/indonesia-education-national-exam-pisa-nadiem-makarim-test-teach-785896

²⁷ Teacher moves Indonesia forward, *Ministry of Education, Culture, Research and Technology*, 2022, <https://sekolah.penggerak.kemdikbud.go.id/gurupenggerak/>

Following lower secondary education, students who meet the grade requirements can enrol in either senior secondary school (grades 10 to 12), or vocational upper-secondary schools. Students can also choose to attend an Islamic secondary school, known as Madrasah Aliyah (MA), or an Islamic vocational school, known as Madrasah Aliyah Kejuruan (MAK). Senior secondary education in Indonesia is not compulsory and is chargeable, with even public senior secondary schools charging small fees. In 2022, there were around 6.6m pupils enrolled in senior secondary schools in Indonesia, 64 per cent of which attend public schools.¹³ According to UNESCO's latest data, the gross enrolment rate for senior secondary schools doubled between 2000 and 2018 from 40 to 80 per cent, in line with the country's institutional educational reforms.²⁸

There is also a growing number of international schools in Indonesia – the most in Southeast Asia – that have been established to meet the demand for English-medium education from wealthy local parents and expatriates. These schools adopt international curriculums such as Cambridge IGCSEs and the International Baccalaureate (IB).

4.3 Technical & vocational education and training

Indonesia's technical and vocational education and training (TVET) system is divided into vocational education and vocational training and are regulated separately. Vocational education teaches the theory and science behind an occupation, while vocational training focuses on the practical skills needed for the role. Vocational education is administered by the MOECRT and the Directorate General of Higher Education. Students can enrol in either vocational education or training, or a combination of both.²⁹ There were over 5m enrolments in vocational education programmes in the 2021-22 academic year.¹³

Historically, there has been low demand for vocational education in Indonesia and this has contributed to the skills mismatch in the country's labour market.³⁰ Low opinion of the value of vocational studies, unclear career progression, and perceived better socio-economic opportunities for university graduates have also hindered the much-needed growth in vocational education enrolments.

Since 2005, the MOECRT has aimed to improve the quality and scale of vocational education provision. It intends to double the capacity of vocational institutions nationally between 2015 and 2025, while significantly increasing the number of postgraduate programmes offered in vocational institutions and the proportion of teachers holding a doctorate degree. Indonesia is currently in a position to benefit from accelerated economic growth through a demographic dividend, whereby the share of its working-age population is larger than the proportion of its non-working-age population. However, the government is aware that this can only be optimised through equipping the working-age population with the level of skills and education that are required in the labour

²⁸ Gross enrolment rate, UNESCO, 2022, <http://data.uis.unesco.org/>

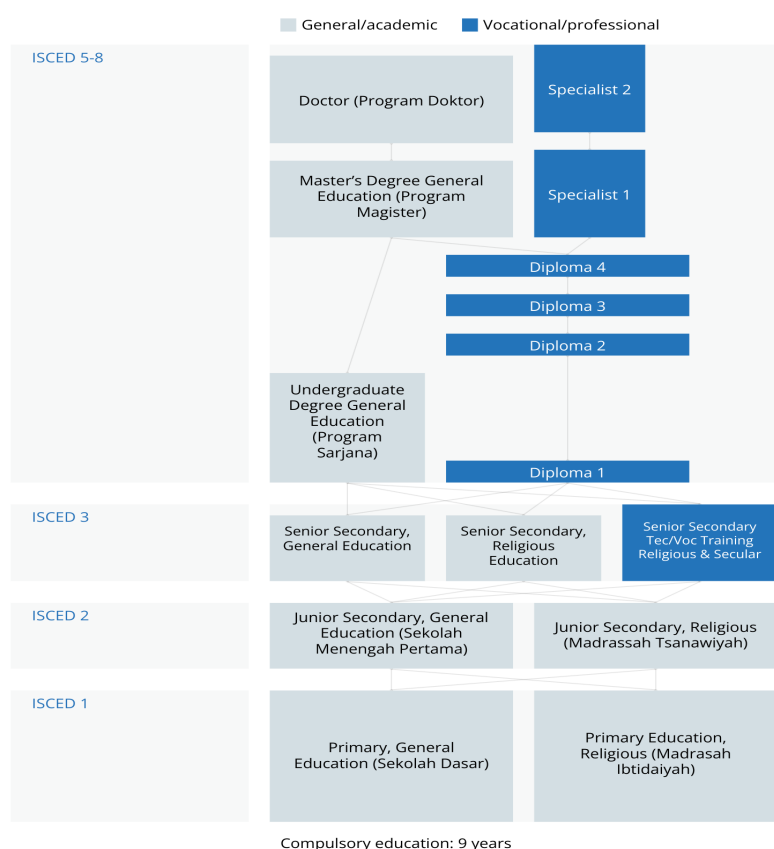
²⁹ [Indonesia TVET country profile](#), UNESCO, 2022

³⁰ Evaluation of Indonesian Technical and Vocational Education in Addressing the Gap in Job Skills Required by Industry, *Ali et. al. 2020*, www.researchgate.net/publication/346640093_Evaluation_of_Indonesian_Technical_and_Vocational_Education_in_Addressing_the_Gap_in_Job_Skills_Required_by_Industry

market and to this end they have targeted that, by 2024, 80 per cent of the working population will have participated in vocational education and training.³¹

Non-formal TVET qualifications are also available in Indonesia (i.e. education that acts as an alternative and/or a complement to formal education). The Directorate General of Early Childhood Education and Community Education is responsible for this area of learning, which is targeted towards those who were unable to access formal education for most of their lives. Non-formal TVET programs include Community Learning Centre (CLC) programmes (lifelong learning programmes starting from childhood) and *Balai Latihan Kerja (BLK)* (or Work Practice Stations) courses which aims to equip disadvantaged individuals and school dropouts with skills that enable them to have access to formal education or work experience in the formal sector.³²

Figure 5: TVET in the Indonesian education system



Source: UNESCO

³¹ Vocational education targeted for 80 per cent of productive aged-people, *SEA-VET*, 2022, <https://sea-vet.net/news/1086-vocational-education-targeted-for-80-percent-of-productive-aged-people>

³² Indonesia TVET country profile, *UNESCO*, 2022, <https://unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=IDN>

4.4 Higher education

Upon completion of secondary education in Indonesia, students can progress to higher education at three different types of HEIs, including universities, advanced schools and polytechnics, and community academies.

In 2020 there were over 3,000 universities (including universities, institutes, polytechnics and academies) in Indonesia of which the vast majority (96 per cent) were private.¹³ Many universities in Indonesia are large, multi-disciplinary institutions that offer a broad range of courses with a degree upon completion, however only a few universities offer postgraduate courses. The university classification also includes 'institutes', which are specialised university-level HEIs that only offer academic programs in particular fields such as sciences and technologies, arts and agriculture. Advanced schools, also known as schools of higher learning, are the most common form of HEI in Indonesia. These offer undergraduate programmes that award a four-year diploma or bachelor's degree. By comparison, polytechnics offer shorter vocational diploma programmes geared towards practical skills used in employment. The third type of HEI in Indonesia, community academies, are generally designed to prepare students for employment that is related to the labour market needs of the regions in which the institutions are located.²²

At present, MOECRT is making efforts to rationalise the size of Indonesia's higher education system. According to the Ministry, as at September 2022, only around 40 per cent of all higher education providers were accredited by the country's quality assurance agency. This means that the Ministry does not have visibility into the performance of the majority of higher education providers within the country. To counteract this issue, the Ministry is no longer issuing new licences for new universities (except for international branch campuses) and is facilitating the mergers of small and struggling higher education providers.³³

In 2021, there were just under 9m students enrolled in the Indonesian higher education system, which represents growth of around 6 per cent from 2020 levels. Across the country, bachelors-level students dominated enrolments, accounting for more than 75 per cent of total enrolled students in every province and 84 per cent of total higher education enrolments at the national level. By contrast, the number of enrolments at the masters and doctorate levels were relatively low and together accounted for just 4 per cent of total higher education enrolments. The remainder of enrolments were made up of diploma, professional certifications and specialist enrolments, according to MOECRT.³⁴

Higher education participation has increased significantly in Indonesia over the last couple of decades, with the gross tertiary enrolment ratio rising from 15 per cent in 2000, to 24 per cent by 2010 and further to 43 per cent by 2022 according to UNESCO. However, there remains a significant urban-rural divide, with the urban population twice as likely to participate in higher education compared to the rural population.³⁵

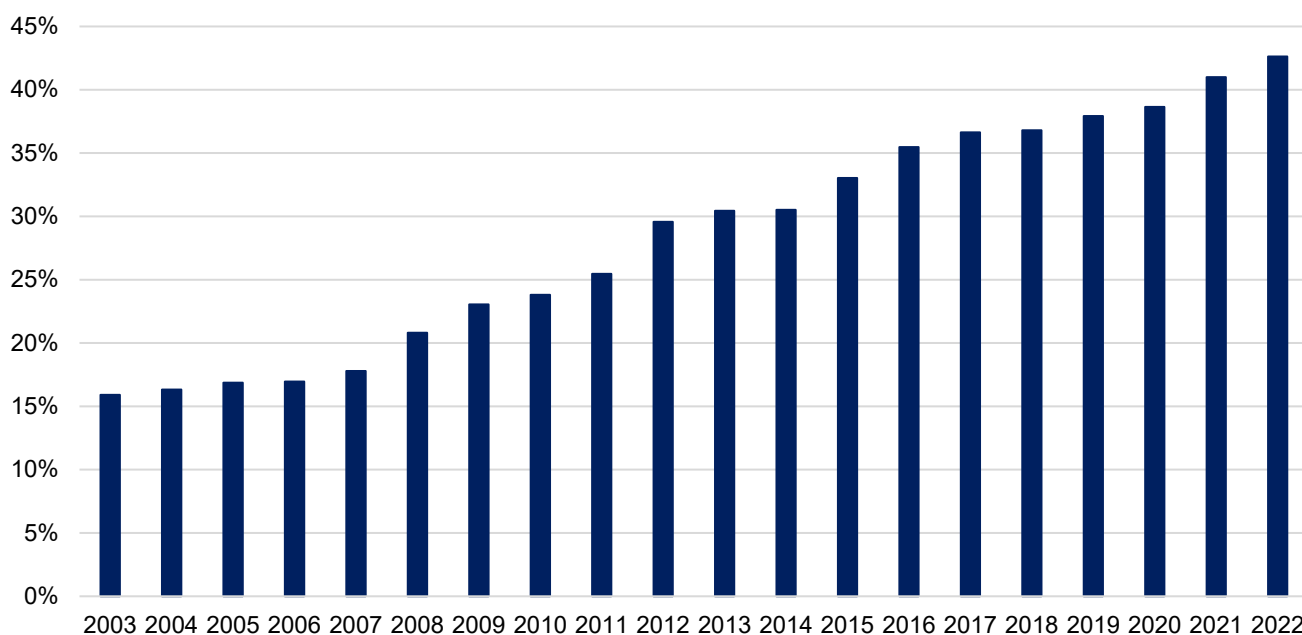
³³ Banyak Perguruan Tinggi Berskala Kecil dan Tidak Sehat, *Kompas*, 2022, www.kompas.id/baca/humaniora/2022/10/11/banyak-perguruan-tinggi-kecil-dan-tidak-sehat

³⁴ Statistik Pendidikan Tinggi, MOECRT, 2021, <https://pddikti.kemdikbud.go.id/>

³⁵ Gross enrolment rate of higher education by area of residence, *Statistics Indonesia*, 2022, www.bps.go.id/indicator/28/1445/1/angka-partisipasi-kasar-apk-perguruan-tinggi-pt-menurut-daerah-tempat-tinggal.html

Despite the strong increase in participation overall, higher education is generally concentrated in the wealthier segments of Indonesian society. While the wealthiest quintile of Indonesia’s population had a gross higher education enrolment ratio of 51 per cent in 2022, the corresponding proportion in the least wealthy quintile was only 19 per cent. The low proportion of lower income quintile students in higher education reflects, in part, a pipeline problem, whereby disadvantaged students are less likely to graduate from secondary school, which then greatly affects their chances of pursuing higher education.³⁶

Figure 6: Indonesia’s tertiary enrolment ratio



Source: World Bank

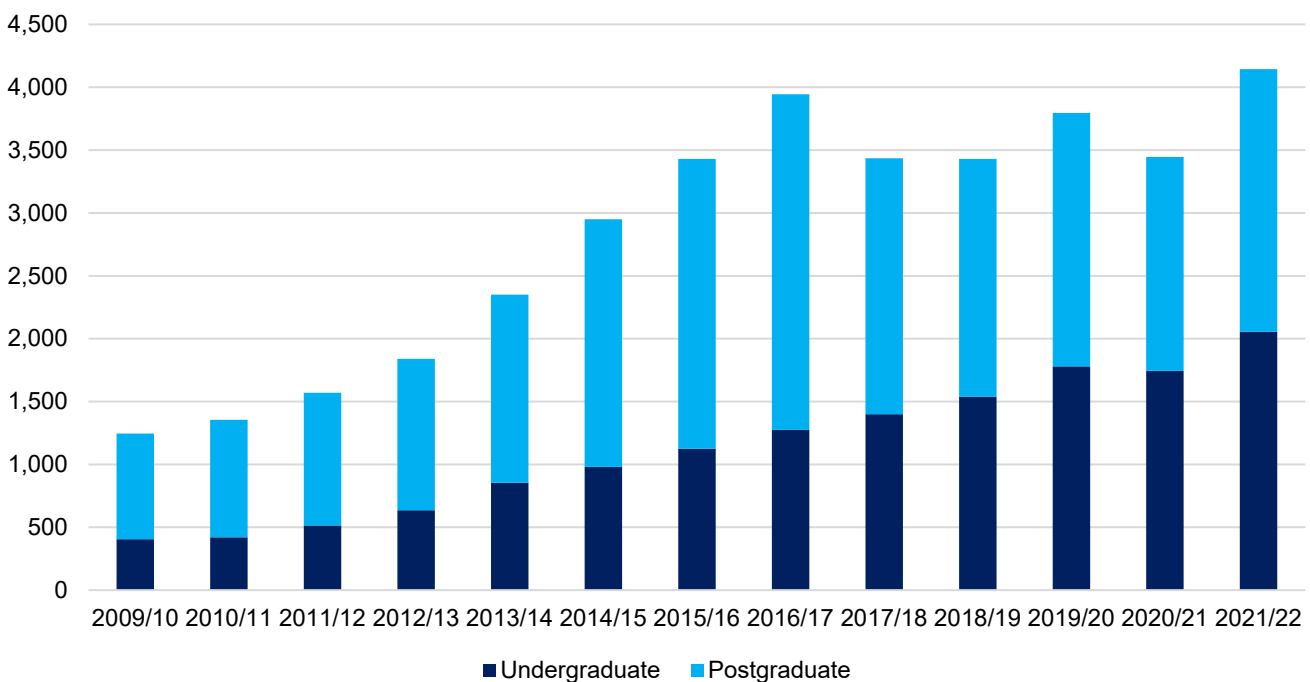
³⁶ Gross enrolment rate by expenditure group, *Statistics Indonesia*, 2022, www.bps.go.id/indicator/28/1444/1/angka-partisipasi-kasar-apk-perguruan-tinggi-pt-menurut-kelompok-pengeluaran.html

5 International Education

5.1 Student mobility

According to estimates from UNESCO, approximately 59,000 Indonesian students travelled abroad to study at the higher education level in 2021, making it Southeast Asia’s second largest outbound international student market, only behind Vietnam, and larger than the likes of Malaysia, Thailand, the Philippines and Singapore. The volume of outbound students has grown by an average of 4 per cent per year over the last decade, from around 37,000 in 2010 to 59,000 in 2021. The most popular destination countries for Indonesian students include Australia, Malaysia, the US, Japan and the UK and Germany, with other East Asian destinations including South Korea and China are also popular options due to their affordability and proximity. Indeed, the leading English-speaking destinations are most popular amongst scholarship funded students, which account for around 10 per cent of Indonesian outbound students.³⁷

Figure 7: Indonesian students in HE programmes in the UK



Source: HESA

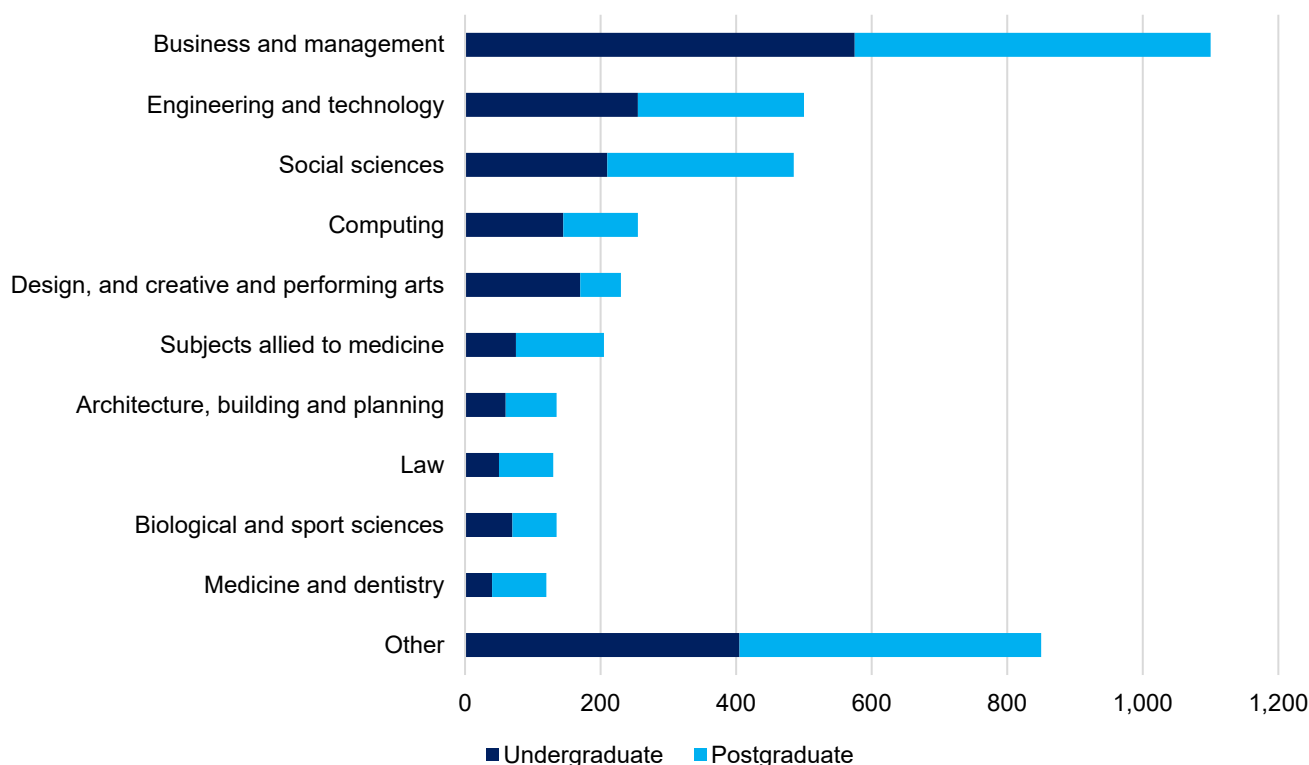
Looking at the UK’s recruitment of Indonesian international students over the last decade, Indonesia has primarily been a postgraduate market for UK HEIs, with around two thirds of enrolments being at the postgraduate level up until 2016/17. Since then, the postgraduate share has been declining and fell to below the 50 per cent mark in the 2020/21 academic year for the

³⁷ Next Generation Indonesia, *British Council*, 2022, www.britishcouncil.org/sites/default/files/t0073_next_generation_report_a4_web_aw.pdf

first time since HESA records began and remained at around this level in 2021/22. In terms of the volume of Indonesian students at UK HEIs, after several consecutive years of growth up until 2016/17 when the total number of Indonesian students had risen to almost 4,000, growth trends over recent years have been less consistent. In the 2017/18 academic year, Indonesian student numbers declined by 13 per cent. In the following year, student numbers held steady at around 3,400 before rebounding by 10 per cent in 2019/20. However, a further decline of around 9 per cent was recorded in the 2020/21 academic year as the Covid-19 pandemic weighed on student mobility. Encouragingly, in 2021/22, both the undergraduate and postgraduate markets recovered strongly, with the total number of Indonesian students growing by 20 per cent and rising above the 4,000 mark for the first time on record.

Consistent with the strong recovery in Indonesian international student numbers, UK study visa issuances to Indonesian nationals bounced back strongly in 2021, surpassing pre-pandemic numbers (2019) by 10 per cent, whereas issuance to other leading Southeast Asian markets (Malaysia, Singapore and Vietnam) remained below their 2019 levels. Furthermore, study visa issuances to Indonesian nationals in 2022 expanded by 13 per cent compared to the level recorded in 2021, pointing to a strong rebound in UK recruitment from Indonesia for the 2021/22 and 2022/23 academic years from the initial impact of the pandemic.

Figure 8: Subjects studied by Indonesian HE students in the UK, 2021/22



Source: HESA

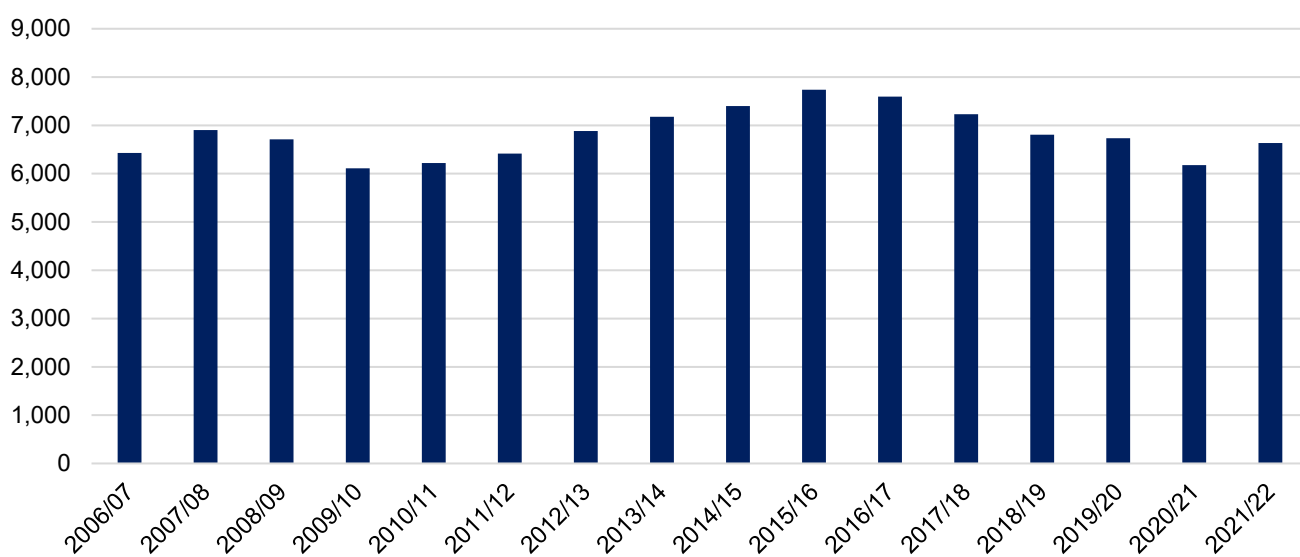
With regards to subject area preferences, business and management was the most popular choice for both undergraduates and postgraduates with 575 and 525 enrolments in 2021/22

respectively. Next came engineering and technology and social sciences which were the second and third most popular subject choices for both undergraduates and postgraduates. At undergraduate level, design and creative and performing arts as well as computing made up the top five subject choices, while subjects allied to medicine and computing made up the top five for postgraduates. Looking back over the last five years, business and management has remained the top subject choice for undergraduates and postgraduates throughout.

The share of Indonesian students enrolled at Russell Group (RG) universities stood at 61 per cent in the 2021/22 academic year, up around 14 percentage points from a decade earlier. The RG share peaked at 63 per cent in 2016/17 and subsequently fell back to around 58 per cent for several years thereafter, before rising above 60 per cent again in 2021/22 which highlights the important role that institutional reputation plays for Indonesian students.

Historically London has been the most popular study region within the UK for Indonesian students, with around a quarter of Indonesian students studying in the capital in 2021/22. The second most popular region for Indonesian students in 2021/22 was Scotland (13 per cent), followed by Yorkshire and the Humber (11 per cent). At institution level, University College London (250 enrolments), the University of Glasgow (205) and the University of Leeds (175) were most popular in 2021/22.

Figure 9: Indonesian HE enrolments in the US

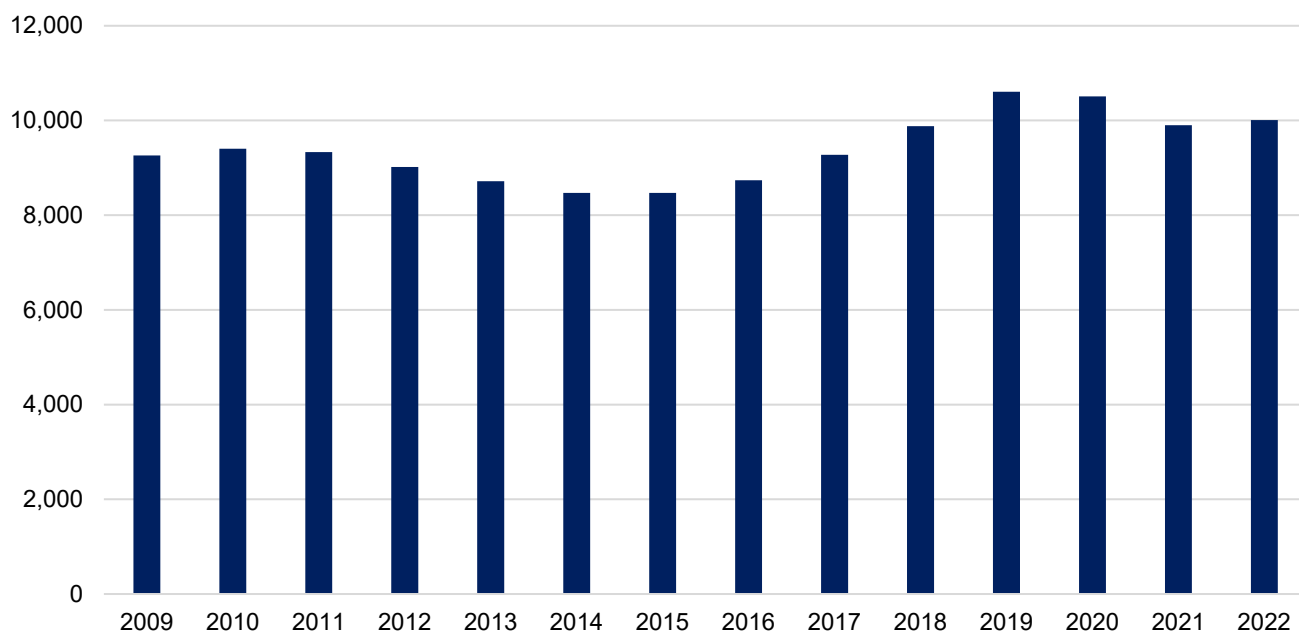


Source: IIE (Note: OPT students excluded)

The US hosted an average of around 7,000 Indonesian students each year in the decade prior to the pandemic. Student numbers reached just over 7,700 in the 2015/16 academic year but were on a consistent downward trajectory for several years thereafter, with the beginning of the period of decline coinciding with the election of President Trump in the US. A survey of Indonesian students by the American Field Service (AFS) identified security concerns as a leading concern for Indonesians studying abroad. Although Indonesia was not included on President Trump’s 2017 travel ban on visitors from Muslim-majority countries, it will not have helped perceptions

amongst Indonesian students regarding the safety and security of Muslim students in the country.³⁸ In the 2021/22 academic year, there was some recovery in Indonesian international student numbers in the US, rising to just above 6,600 from 6,200 in 2020/21 and posting positive year-on-year growth for the first time since 2015/16. However, student numbers remain almost 15 per cent below previous peak levels. Looking ahead, the Biden administration has sought to provide a more accommodative environment for international students, including the cancellation of a proposal to limit international student visa to four years, which may lead to a resurgence in the growth of international students flows from Indonesia to the US in future.

Figure 10: Indonesian HE enrolments in Australia



Source: AusTrade

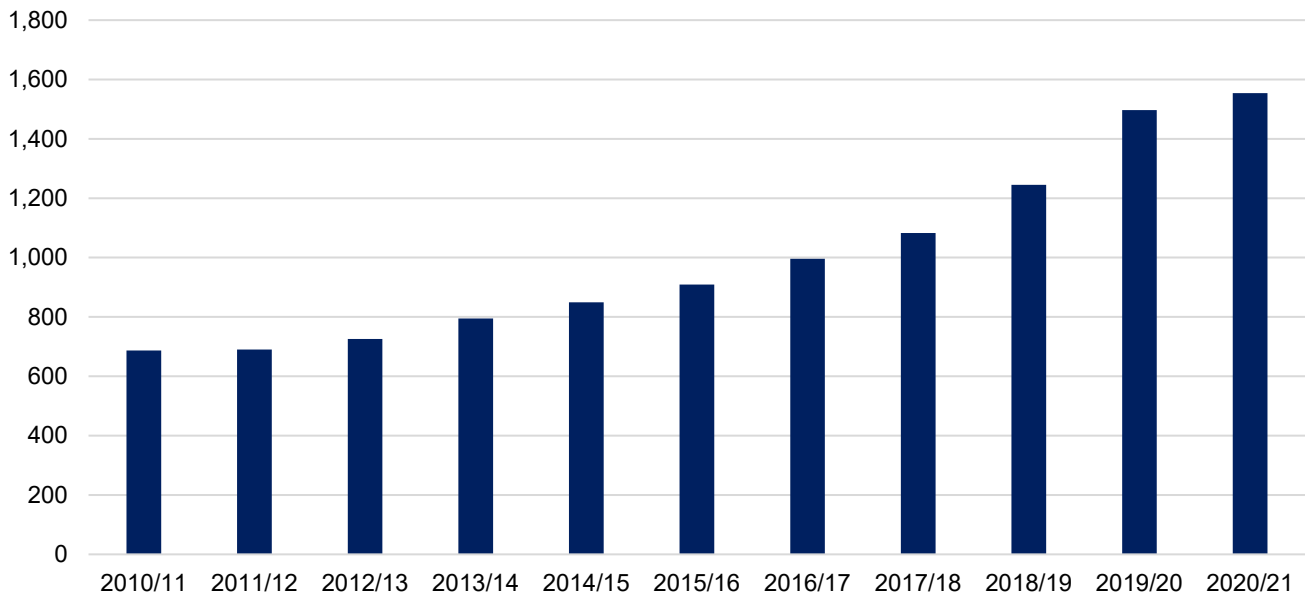
Australia has long been a popular destination for Southeast Asian internationally mobile students and is currently the most popular destination for Indonesian students. After several years of decline up until 2015, renewed growth commenced in 2016, with Indonesian student numbers peaking at over 10,600 in 2019. During this period, Australia gained market share at the expense of the UK and US, where declines in student numbers from Indonesia were recorded.

However, the highly restrictive border control and international travel policies employed by the Australian government after the onset of the Covid-19 pandemic saw student numbers from Indonesia fall by 6 per cent in 2021 before managing a 1 per cent growth in 2022.³⁹ In February 2023, it was announced that post study work rights for international graduates with select degrees would be extended by two years, starting from July 2023, which has helped facilitate a return to the pre-pandemic upward trajectory of student flows from Indonesia to Australia in 2023.

³⁸ Indonesian teens highly motivated to study abroad, *AFS Indonesia*, 2017, <https://afs.org/2017/12/01/indonesian-teens-highly-motivated-to-study-abroad/>

³⁹ Given its academic year starts in February, inbound student flows to Australia were partly shielded from the impact of the pandemic in 2020

Figure 11: Indonesian HE enrolments in Canada



Source: StatCan

Although it remains some distance behind the other major English-speaking destinations, Canada has recorded strong growth in inbound student numbers from Indonesia over the last decade. Student numbers have increased every year since 2010/11 and have more than doubled from just under 700 to almost 1,600 in the 2020/21 academic year. Canada’s success in growing its market share in Indonesia is consistent with its growing prominence as a leading study destination for international students from across the world more generally, with the government having made a concerted effort to attract more international higher education students over recent years through committing significant funds each year to aid its branding and marketing efforts. In addition, Canada is often seen as a more affordable study destination than the US and major European destinations, while its Post-Graduation Work Permit (PGWP) Program allows students who have graduated from eligible institutions to obtain an open work permit to gain valuable Canadian work experience, which can help graduates qualify for permanent residence in Canada.

From an inbound perspective, Indonesia is not a large host market for international students, hosting just 7,700 in 2018 according to UNESCO, with the majority of inbound students coming from regional neighbours. The largest senders in 2018 were Malaysia and Timor-Leste, followed by Thailand, India and China. Inbound student flows to Indonesia are of a very small scale relative to regional neighbours such as Malaysia (89,000), Singapore (55,000) and Thailand (25,000) in the same year, although those numbers have seen some decline in more recent years.

5.2 Transnational education and distance learning

Despite the wider Asia region being the UK's leading TNE and distance learning market, Indonesia is not currently a major market for the UK, with just 970 TNE and distance learning students in the 2021/22 academic year. This compares to much higher student numbers in other Southeast Asian countries such as Malaysia (47,400), Singapore (27,970) and Vietnam (7,120). However, looking back over the last decade, the UK's number of TNE and distance learning students in Indonesia has been on a largely consistent upward trajectory, and has tripled from the 230 students recorded in 2010/11.

At present, the UK has no branch campuses in Indonesia, with distance, flexible and distributed learning the primary mode of provision, accounting for around two-thirds of students in the 2021/22 academic year. In terms of the level of provision, in 2021/22, just over 62 per cent of the UK's TNE students in Indonesia were enrolled in undergraduate degree programmes, while the remaining 37 per cent were enrolled in taught masters and research doctorate programmes.

Although the TNE market in Indonesia is currently under-developed relative to other countries in the region, given the country's young population, fast-growing economy and rapidly increasing tertiary enrolment rates, Indonesia is a market with significant potential for future growth. The Indonesian government is keen to improve the quality of the country's higher education and it sees global collaboration as a means by which to achieve this, with the MOECRT recently launching a new scholarship programme to support Indonesian post-graduate students on TNE programmes. Furthermore, Indonesian authorities are actively encouraging international universities to set up in the country, but they must do so in a way that supports Indonesia's development and benefits local institutions.⁵⁵

In 2018, the Indonesian government set out guidelines for the establishment of international branch campuses in the country. The guidelines dictate that institutions should offer programs in priority subject areas that are not already widely available in Indonesia, they must collaborate with a local partner, and they must operate as a non-profit. Furthermore, the focus is on institutions in the top 100 in global rankings. In 2021, Australian university Monash became the first institution to set up a foreign-owned branch campus in Indonesia. In addition to branch campuses, foreign universities are also invited to develop partnerships with local institutions to establish a new university or deliver joint study programs. Some are already doing this.

Excluding distance learning models, only five UK universities reported students studying TNE programmes in Indonesia, with the largest partnership being the BINUS Northumbria School of Design operated jointly by Northumbria University and BINUS University, a private university in Indonesia.

A report on Indonesia published in 2022 by the UK's Quality Assurance Agency for Higher Education (QAA) emphasised the popularity amongst Indonesia students of studying locally, given the strongly family orientated culture within the country, which suggests that TNE and distance learning will have an important role to play as the UK aims to increase its footprint in the Indonesian higher education market in future.⁵⁵

6 UK Cooperation

The UK government launched its International Education Strategy in March 2019 (subsequently updated in May 2022), which stated its commitment to the target of hosting 600,000 international students and growing the industry's economic impact to £35bn annually by 2030. Within this plan, Indonesia was identified as one of five priority countries with significant potential for bilateral growth in the international higher education sector, alongside India, Saudi Arabia, Vietnam and Nigeria. This underlines the perceived strategic importance of Indonesia by UK policymakers for the future growth of international education in the UK.⁴⁰ Furthermore, a Joint Working Group between the UK and Indonesia governments has been established to provide a high-level forum to discuss stronger collaboration between the two higher education systems. Priority areas discussed in recent Joint Working Group forums includes TNE, TVET, edtech, research collaboration, English and teacher training.

In 2020, Indonesia and the UK signed a Memorandum of Understanding (MoU) on research and innovation, aimed at supporting long-term sustainable growth in Indonesia through expanding cooperation in research and innovation between policymakers in government, government agencies, research organisations, HEIs, companies and enterprises in the two countries.⁴¹ As a result of the MoU, a new UK-Indonesian research consortium – the UK-Indonesia Consortium for Interdisciplinary Sciences (UKICIS) – was established in 2020 to pioneer research and expertise in building global resilience against pandemics, the climate emergency and natural hazards.⁴² In addition, the consortium aims to deliver training, educational programmes and capacity building for HEIs in both countries, prepare policy briefs for both the UK and Indonesian governments, and support academic and student exchanges between the two countries. Its membership includes the University of Nottingham, the University of Warwick, Coventry University and, from Indonesia, the Institut Teknologi Bandung, Institut Pertanian Bogor, and Universitas Gadjah Mada.⁴³

Further, in 2022 the UK-Indonesia Partnership Roadmap 2022-2024 was announced, committing the two countries to closer strategic co-operation in a wide range of areas, including education, research and innovation. On education, the Roadmap supports educational collaboration in international mobility and exchange between the UK and Indonesia, for example through programmes such as the Turing Scheme, and promotes Indonesia as a priority destination for UK providers of higher education to identify and develop TNE partnerships with Indonesian counterparts, and improve English Language Training (ELT) capability for Indonesian teachers. Meanwhile, on research and innovation, the Roadmap aims to build on existing academic collaboration between the countries to increase research and development programmes in life sciences and technology. Additionally, the Roadmap aims to build new and deepen existing

⁴⁰ International Education Strategy: 2021 update, *UK Dept. for Education and Dept. for International Trade*, 2021, www.gov.uk/government/publications/international-education-strategy-2021-update/international-education-strategy-2021-update-supporting-recovery-driving-growth

⁴¹ Indonesia and UK agree to strengthen research and innovation cooperation, *Embassy of the Republic of Indonesia to the UK and Ireland*, 2020, <https://kemlu.go.id/london/en/news/7869/indonesia-and-uk-agree-to-strengthen-the-research-and-innovation-cooperation>

⁴² *UK Indonesia Consortium for Interdisciplinary Sciences*, *About UKICIS*, accessed October 2022

⁴³ New UK Indonesian research consortium launches, *University of Nottingham*, 2020, www.nottingham.ac.uk/news/new-uk-indonesian-research-consortium-launches-to-tackle-coronavirus-and-climate-change

science and technology research and development partnerships, creating deeper links between the research and innovation communities in the two countries.⁴⁴

The British Council has made an important contribution in the achievement of some of the goals outlined in the Roadmap, which has included:

- Support provided by the British Council in designing the Indonesia International Student Mobility Award (IISMA) and promotion within the UK to encourage UK universities to become IISMA overseas university partners.
- Provision of eight grants, each valued at £30k, to support UK-Indonesia TNE partnerships.
- Provision of eight new UK-Indonesia English Digital Innovation Grants, with the aim of strengthening professional development for English teachers in schools and lecturers in higher education institutions across Indonesia.
- Sir Steve Smith, International Education Champion, led a UK delegation of HEI Vice Chancellors to Jakarta in late 2022. The delegation engaged with the MOECRT and top higher education providers in Indonesia to enhance bilateral relationships, following on from the British Council 'Going Global Asia Pacific' conference in Singapore.

⁴⁴ UK Indonesia Partnership Roadmap 2022-2024, *Foreign, Commonwealth and Development Office*, 2022, www.gov.uk/government/publications/uk-indonesia-partnership-roadmap-2022-to-2024/uk-indonesia-partnership-roadmap-2022-to-2024