

2022

해외물류시장 투자설명회

경제특별구역 (Special Economic Zone)

Bambang Wijanarko 본부장

인도네시아 경제조정부







LOGISTICS AND SPECIAL ECONOMIC ZONES (SEZ) IN INDONESIA

Overseas Business Investment Forum

KOREAN MARITIME INSTITUTE

27 September 2022



A Glance of Indonesia



POPULATION:
275.773.800 *

Area	: 5,189,053 km ²
Sea	: 3,257,483 km ²
Land	: 1,922,570 km ²
Island	: 17,508
Province	: 34
District/City	: 514

COMMODITIES PRODUCED IN INDONESIA

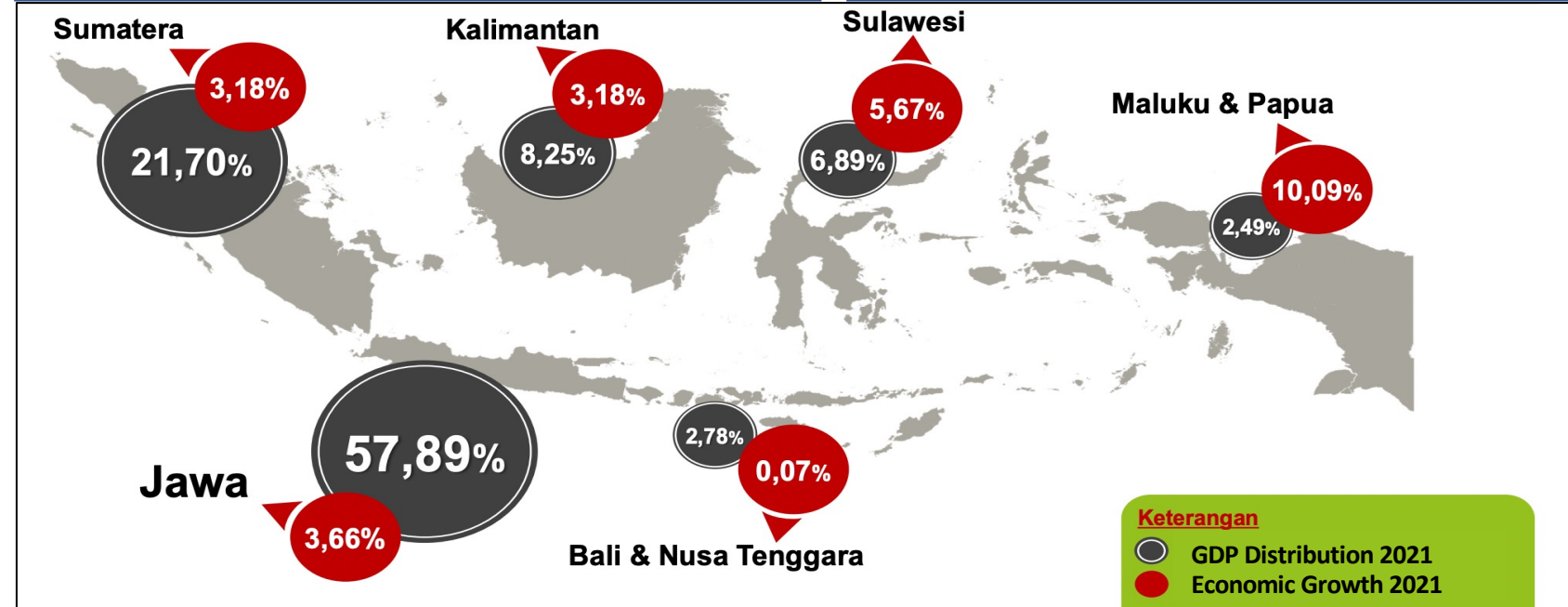
1. Natural resource-based commodities such as petroleum, natural gas, tin, nickel, wood, bauxite, copper, coal, agricultural products, plantation products, fishery products, etc.
2. Manufactured commodities such as automotive, textile, food and beverage, etc.



GDP*:
IDR16,970.8 trillion ≈ USD1.13 billion



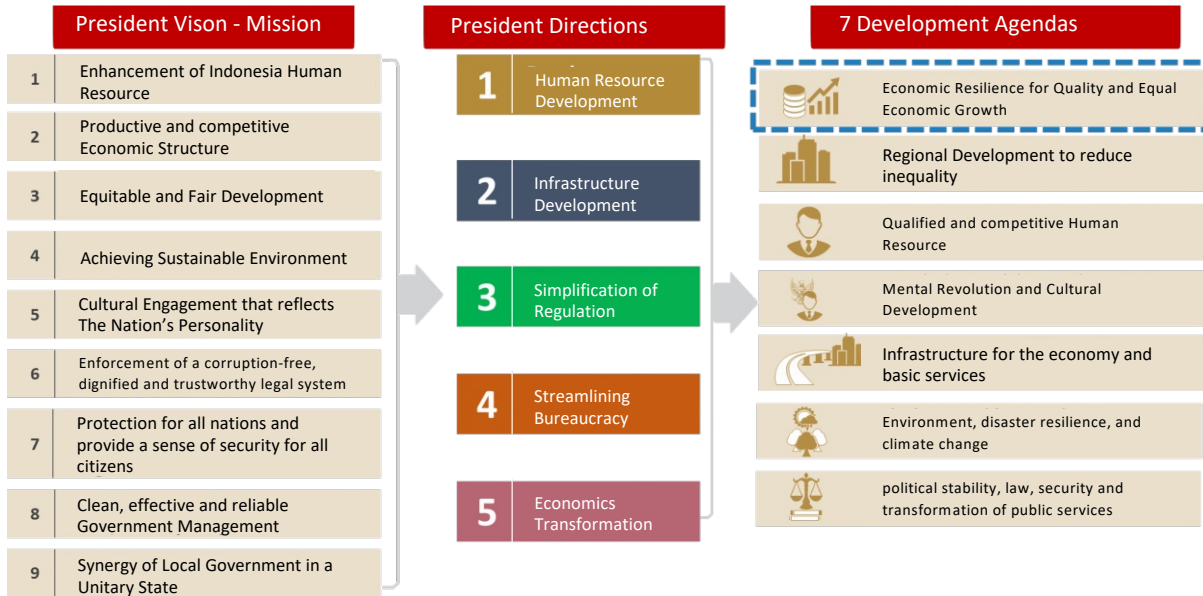
GDP per capita*:
IDR62.2 million ≈ USD3,349



- Indonesia is an archipelagic country that has more than 17,000 large and small islands. Therefore, sea transportation plays an important role in Indonesia's economic growth.
- However, economic activity is still concentrated on the island of Java. Inequality of GDP on the island of Java and outside Java has resulted in inefficiency in sea transportation due to a shortage of counter loads from areas in eastern Indonesia (unbalanced cargo).
- The Government through the issuance of Presidential Decree 26 of 2012 seeks to encourage the efficiency of the national logistics system.

Logistics in THE NATIONAL MEDIUM-TERM DEVELOPMENT PLAN 2020-2024

1 Development Agenda



2 First National Priority (NP)

NP #1 | Strengthening Economic Resilience for Quality and Equal Economic Growth

- PP 1 Fulfilling The Needs for Energy by prioritizing Renewable Energy
- PP 2 Increasing Water Quantity/Resilience to support Economic Growth
- PP 3 Increasing the availability, access and quality of food consumption
- PP 4 Improving Maritime, Fisheries and Marine Management
- PP 5 Enhancing Entrepreneurship, Micro, Small, Medium Enterprises and Cooperatives
- PP 6 Increasing the Added Value of Employment and Investment in the real sector, and industrialization
- PP 7 Increasing high added value Exports and Strengthening the Local Content
- PP 8 Strengthening the Pillars of Growth and Economic Competitiveness

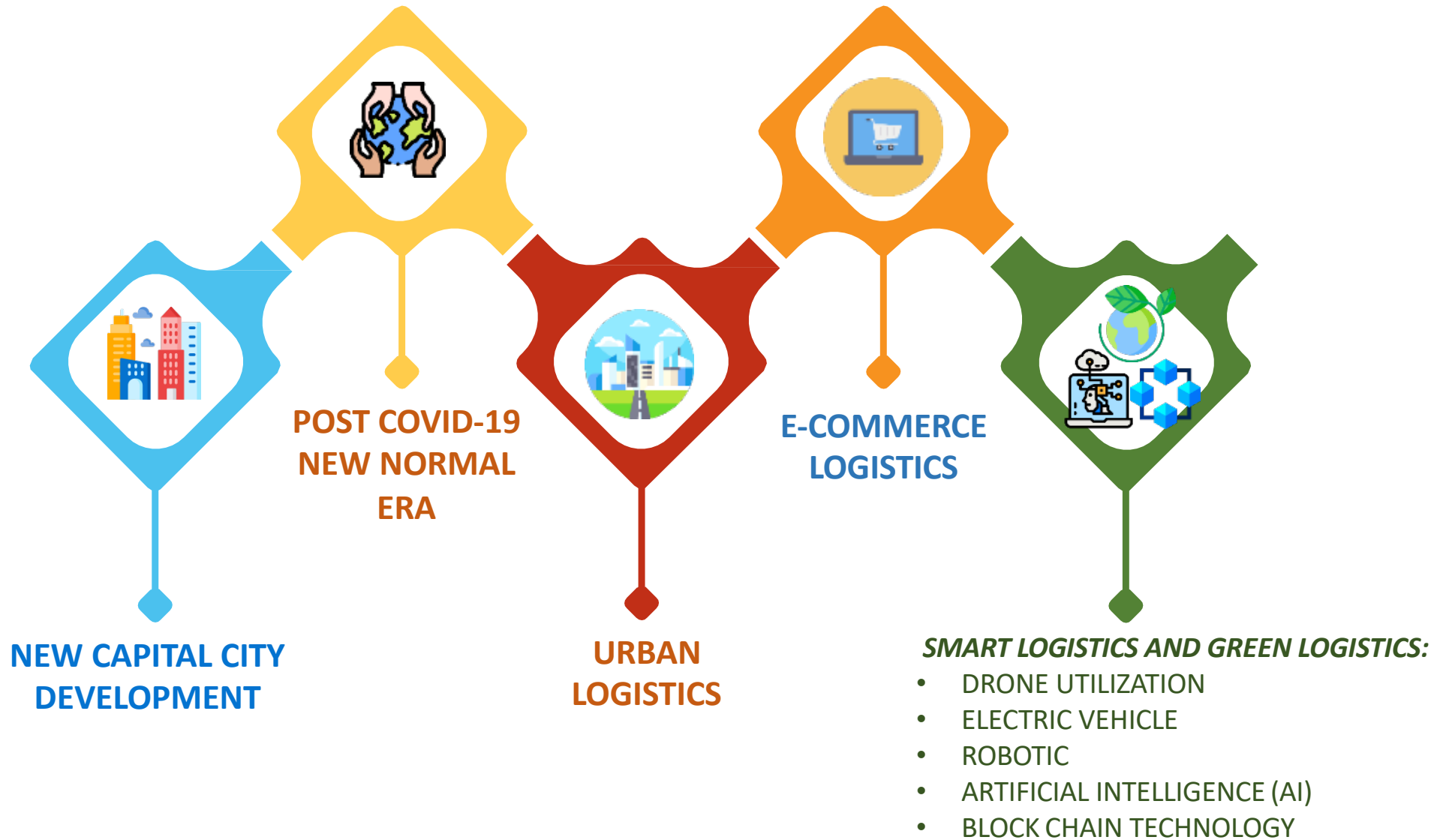
3 Strategy

- 1) Increasing the deepening of the financial system
- 2) Optimizing the use of Digital Technology and Industry 4.0
- 3) Improve Logistics System and Price Stability
- 4) Improving the implementation of sustainable practices in the Manufacture and Tourism Industries
- 5) Fiscal Reform
- 6) Improving the availability and quality of data and information on economic development, especially food and agriculture, maritime, tourism, creative economy, digital economy

4

Strategy	Focus	Indicator	Baseline 2019	Target 2024
Improve Logistics System and Price Stability	<ul style="list-style-type: none"> ❑ Increased efficiency of national distribution for the smooth flow of goods and services between regions. Its implementation is complemented by the construction of facilities and infrastructure to support distribution and logistics efficiency. ❑ Improvements in the logistics system are also directed at increasing the efficiency of international trade through accelerating the flow of imported and exported goods by implementing business process integration through the Indonesia National Single Window (INSW) system. 	Logistic Cost to GDP	23,2%	20%
		Logistic Performance Indeks (LPI)	3,1	3,5

Logistics in Indonesia



Special Economic Zones in **Indonesia**

The basic concept of Indonesia SEZs is an area that has been prepared, which have accessibility to the global market or the main resources (access to the sea-port and or airport)



Objectives:

1. **Increased investment;**
2. **Optimization of export and import** industries and other activities which have high economic value;
3. The **acceleration of regional development** through the **development of new economic growth centers** to balance development between regions; and
4. The realization of a breakthrough model for the development of areas, such as industrial, tourism and trade zones so as to **create jobs**.

Different Roles in SEZ Development

Local Government

- As the party who get the most benefit of SEZ model, local government requires to build good business ecosystem such as legal certainty for investment and local incentive facilities
- Provide local infrastructure surrounding SEZ

Central Government


- Establish standards, guidelines and manuals for SEZ
- Supporting in synchronization and integration of infrastructure surrounding SEZ
- Provide incentive and facilities to boost SEZ competitiveness and attract investors

Developer


- Land acquisition and develop the SEZ
- Attract Investors

Indonesia SEZ

18 SEZs and its Primary Activities

1. Arun Lhokseumawe 

North Aceh & Lhokseumawe, Aceh
(Government Regulation No. 05/2017 - February 2017)
Operating in December 2018
Primary Activities:
- Energy Industry
- Petrochemical and other chemical Industry
- Palm Oil Industry
- Logging Industry
- Logistic

2. Sei Mangkei SEZ 

Simalungun, North Sumatera
(Government Regulation No. 29/2012 - February 2012)
Operating in January 2015
Primary Activities:
- Palm oil Industry
- Rubber Industry
- Tourism
- Logistic

3. Batam Aero Technic SEZ 

Batam, Riau Islands
(Government Regulation No. 67/2021 - June 2021)
Primary Activities:
- MRO Industry (Maintenance, Repair, Overhaul)

4. Nongsa SEZ 

Batam, Kepulauan Riau
(Government Regulation No. 68/2021 - June 2021)
Primary Activities:
- IT-digital
- Tourism

5. Galang Batang SEZ 

Bintan, Riau Islands
(Government Regulation No. 42/2017 - October 2017)
Operating in December 2018
Primary Activities:
- Bauxite Industry
- Logistic

11. Singhasari SEZ 


Malang, East Java
(Government Regulation No. 68/2019 - September 2019)
Primary Activities:
- Tourism
- Digital Technology

12. Mandalika SEZ 

Central Lombok, NTB
(Government Regulation No. 52/2014 - June 2014)
Operating in October 2017
Primary Activities:
Tourism

13. MBTK SEZ 

East Kutai, East Kalimantan
(Government Regulation No. 85/2014 - October 2014)
Operating in April 2019
Primary Activities:
- Palm Oil Industry
- Energy Industry
- Logistic

14. Palu SEZ 

Palu, Central Sulawesi
(Government Regulation No. 31/2014 - May 2014)
Operating in September 2017
Primary Activities:
- Base Metal Industry
- Logistic

15. Likupang SEZ 

North Minahasa, North Sulawesi
(Government Regulation No. 84/2019 - December 2019)
Primary Activities:
Tourism

16. Bitung SEZ 

Bitung, North Sulawesi
(Government Regulation No. 32/2014 - May 2014)
Operating in April 2019
Primary Activities:
- Coconut Processing Industry
- Fishery Industry
- Logistic

17. Morotai SEZ 

Morotai Islands, North Maluku
(Government Regulation No. 50/2014 - June 2014)
Operating in April 2019
Primary Activities:
- Fishery Industry
- Tourism
- Logistic

18. Sorong SEZ 

Sorong, West Papua
(Government Regulation No. 31/2016 - August 2016)
Operating in October 2019
Primary Activities:
- Nickel Smelter Industry
- Palm Oil Industry
- Forestry (Sago) Industry
- Logistic

6. Tanjung Kelayang SEZ 

Belitung, Bangka Belitung
(Government Regulation No. 06/2016 - March 2016)
Operating in March 2019
Primary Activities:
Tourism

7. Tanjung Lesung SEZ 

Pandeglang, Banten
(Government Regulation No. 26/2012 - February 2012)
Operating in February 2015
Primary Activities:
Tourism

8. Lido SEZ 

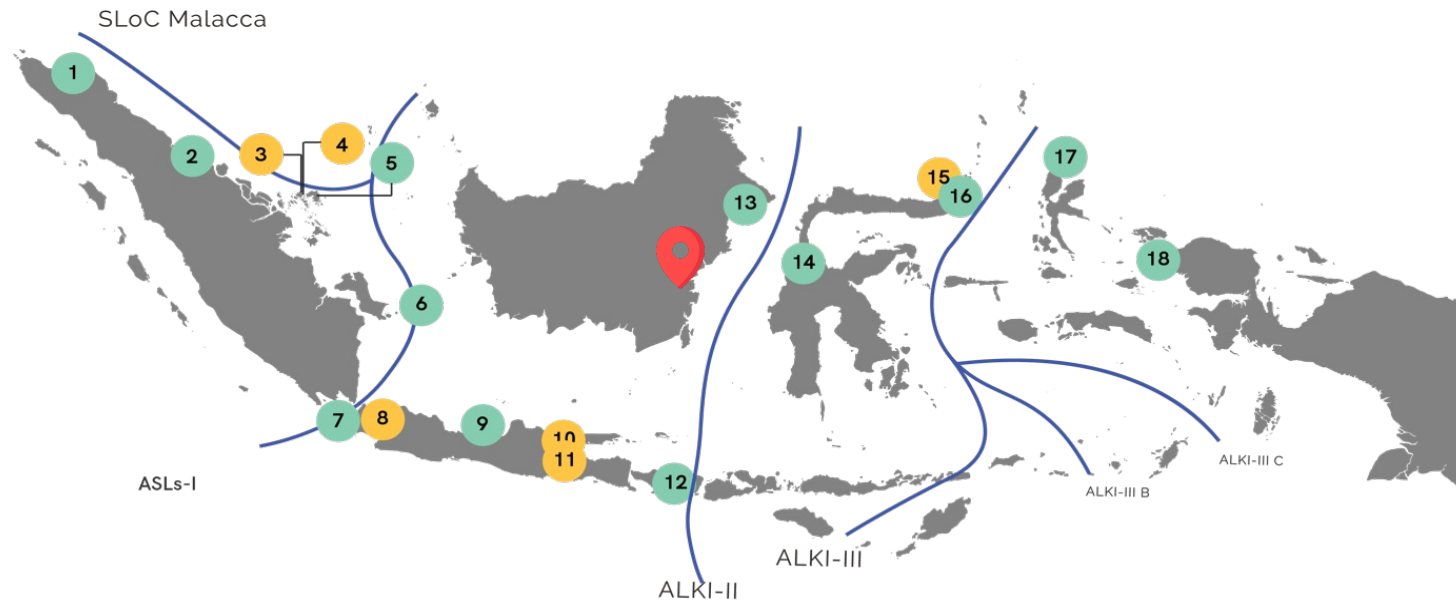
Bogor, West Java
(Government Regulation No. 69/2021 - June 2021)
Primary Activities:
- Tourism
- Creative Industry

9. Kendal SEZ 

Kendal, Central Java
(Government Regulation No. 85/2019 - December 2019)
Operating in May 2021
Primary Activities:
- Textiles and Clothing Industry
- Furniture and Toy Industry
- Food and Beverage Industry
- Automotive Industry
- Electronic Industry
- Logistic

10. Gresik SEZ 

Gresik, East Java
(Government Regulation No. 71/2021 - September 2019)
Primary Activities:
- Metal Industry
- Electronic Industry
- Chemical Industry
- Energy Industry
- Logistic



Feature of Indonesia SEZ

Our Portfolio



Thematic

Developer may choose one or more from designated themes



Incentives and Facilities

Fiscal incentives from Central and Local Government



One-Stop-Service

Administrator is appointed for all business licensing service



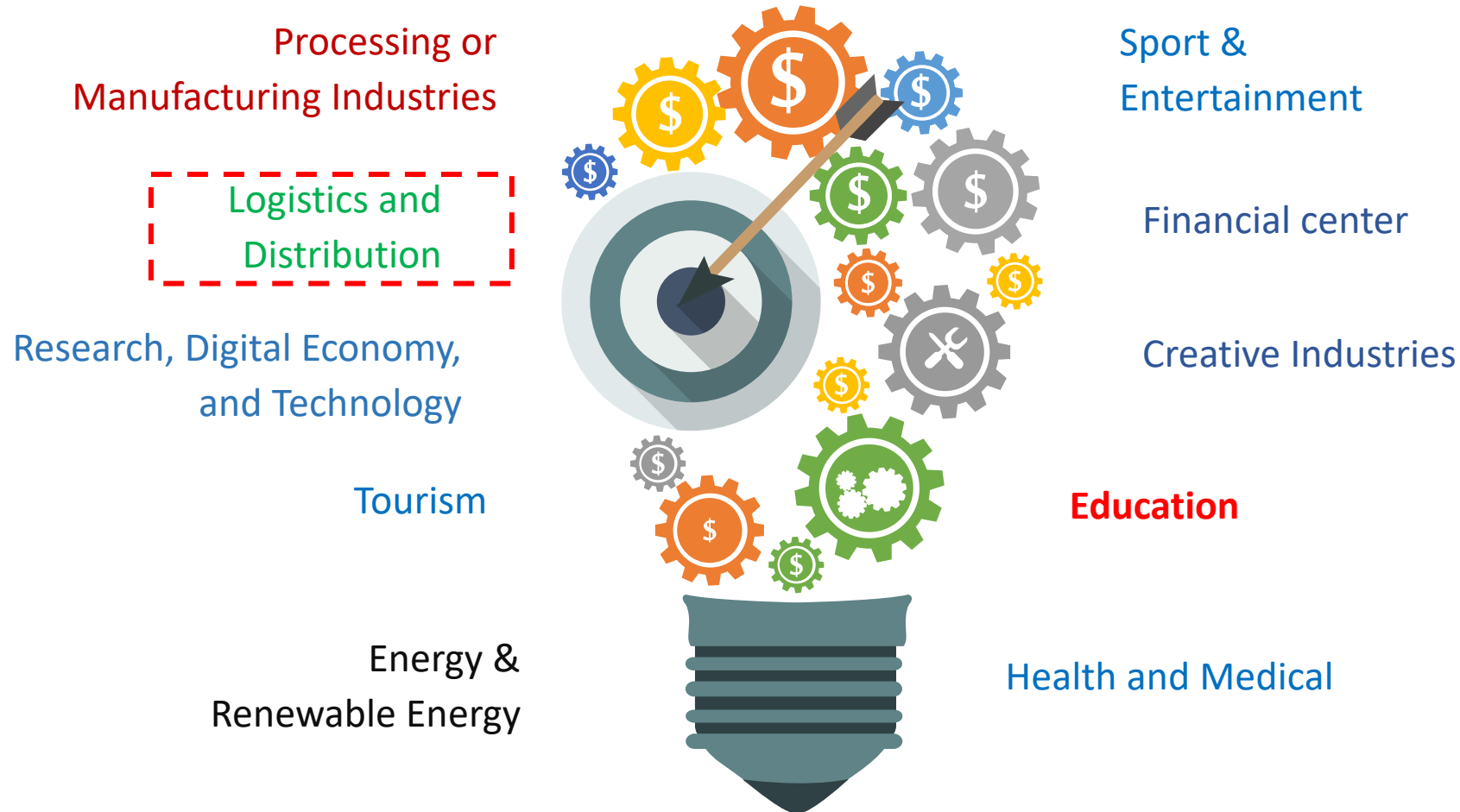
Multi-Sectors

Developer may select more than one sector



SEZ Themes

One or more theme(s) could be chosen by developer



Sectors Opportunity

in Indonesia SEZ



Petrochemical Industry



Base Metal Industry



Electronic Industry



Health



Education



Automotive Industry



MRO Industry



Digital Technology Industry



Bauxite Industry



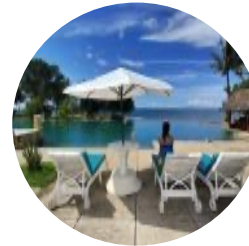
Nickel Smelter Industry



Energy



Logistics



Tourism



Food & Beverage Industry



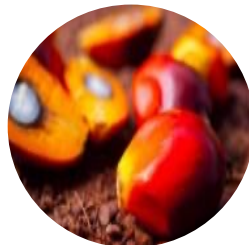
Furniture & Toy Industry



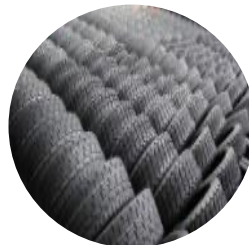
Textile & Clothing Industry



Fishery Industry



Palm Oil Industry



Rubber Industry



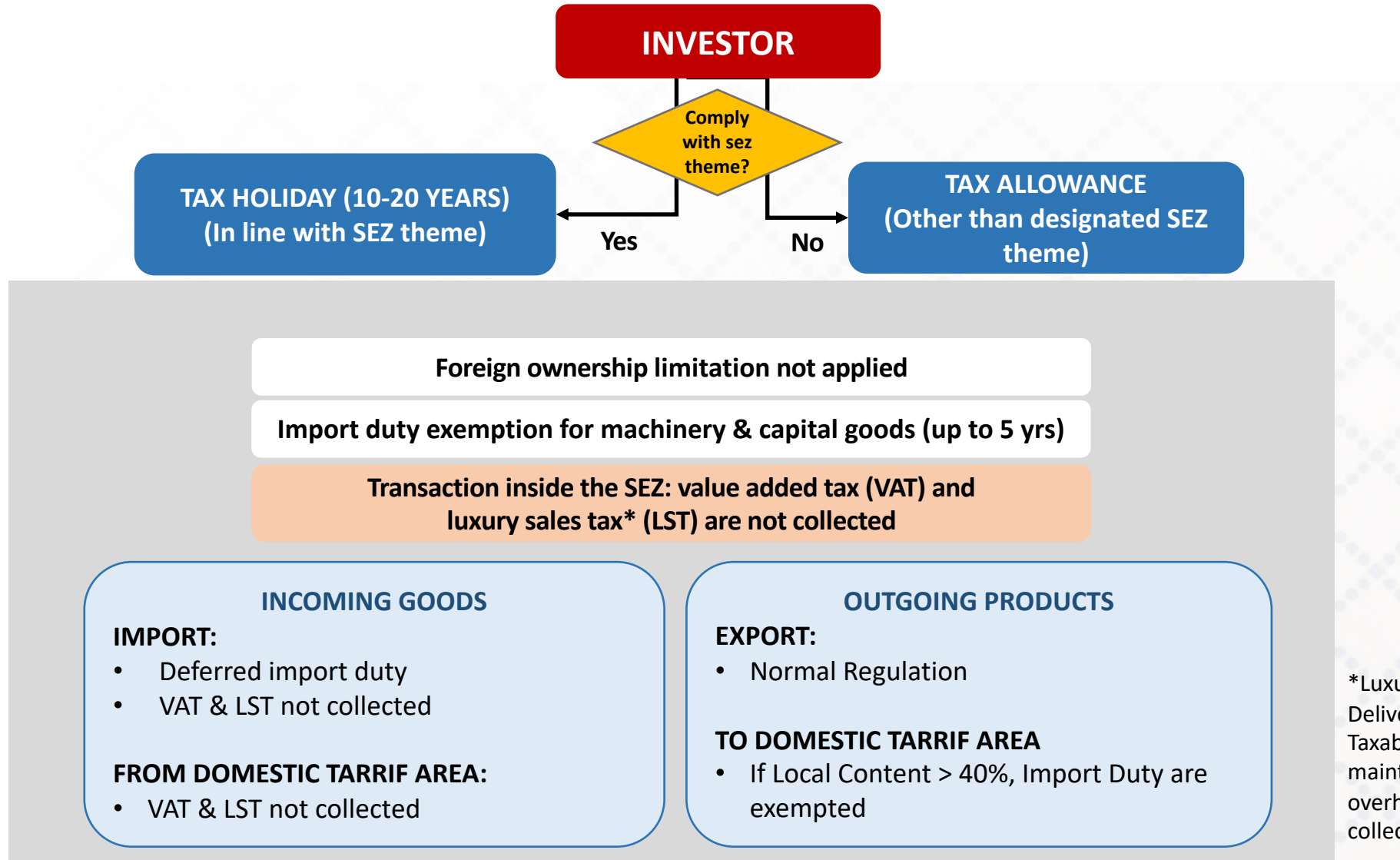
Forestry (Sago) Industry



Coconut Processing Industry

Fiscal Incentives

In Indonesia SEZ



Fiscal Incentives

Tax Holiday

INVESTMENT	PERIOD
Tenant:	
US\$ 7 million up to < US\$ 35 million	10 years
US\$ 35 million up to < US\$ 70 million	15 years
More than US\$ 70 million	20 years

US\$ 1 = Rp14.000

- Corporate Income Tax deduction **100%**
- **2 years after Tax Holiday period, Corporate Income Tax is deducted by 50%**

Fiscal Incentives

Tax Allowance

CIT reduction	<ul style="list-style-type: none">• Reduction net income by 30% of the amount invested, prorated at 5% for six years• Losses carried forward for 10 years• Accelerated depreciation and amortization• Dividends tax 10% or lower for treaty countries	<ul style="list-style-type: none">• Tenant who invest in primary activity < US\$ 7 million• Tenant who applied for all other main activity than designated SEZ theme
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US\$ 1 = Rp14.000

Other Facilities

In Indonesia SEZ



How to Apply

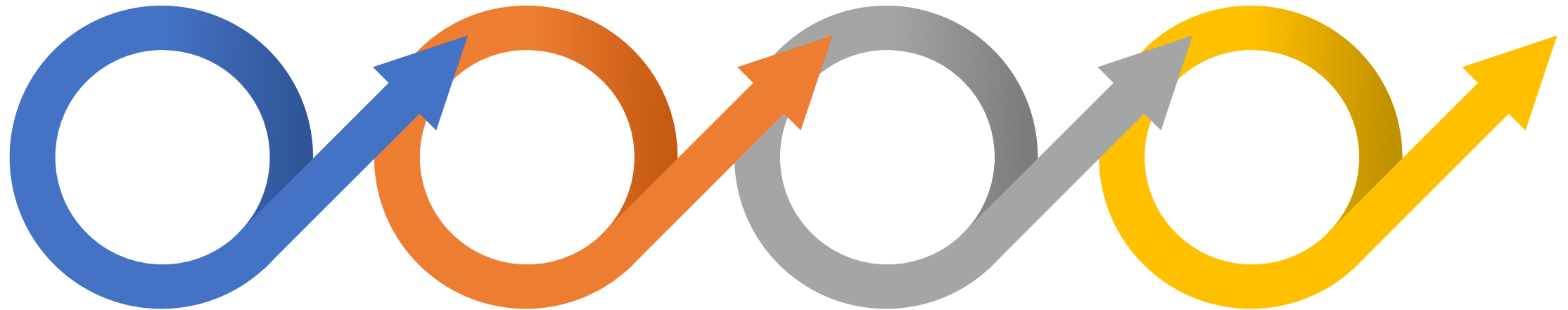
As a Developer

Preparation

Set up Company, Masterplan study, environmental assessment

Submit the proposal to the National Council

Proposal with other required supporting document (local government support, environmental study, masterplan)



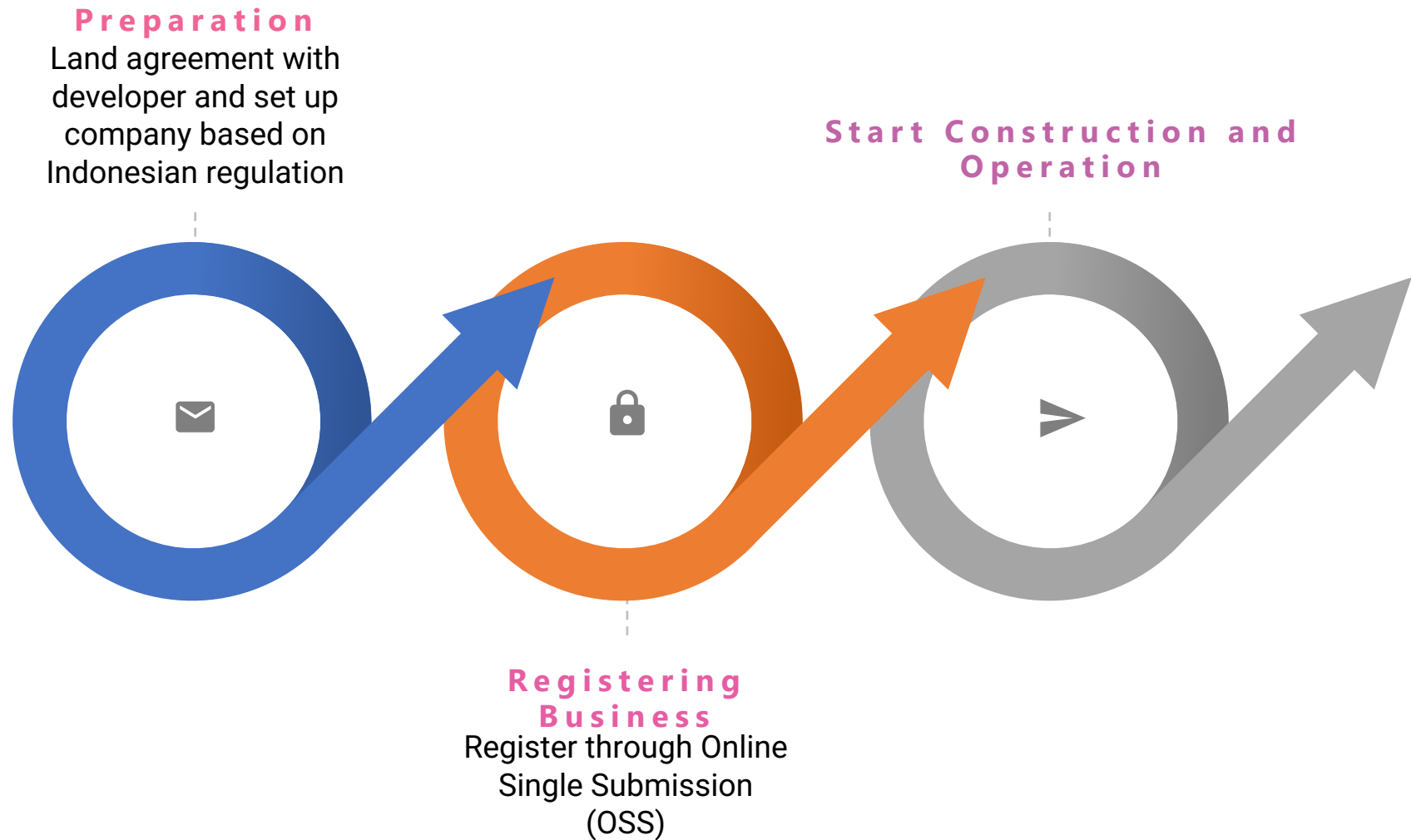
Land

Provide land with at least 50% of the proposed area

Declaration of SEZ

Declaration of the SEZ by issuing Government Regulation

How to Apply As a Tenant



Arun Lhokseumawe

North Aceh Regency, Lhokseumawe City, Aceh Province






LOCATION






PROFILE

-  **LEGAL BASIS**
Government Regulation (PP) Number 5 of 2017
Officially Operated :
December 14th 2018
-  **DEVELOPER**
PT Patriot Nusantara Aceh (PATNA)
-  **AREA**
2,622.48 Ha
-  **POPULATION**
North Aceh: 593,492 People







BUSINESS OPPORTUNITY

-  **Energy Industry**
-  **Palm Oil Industry**
-  **Petrochemical and other chemical Industry**
-  **Logging Industry**
-  **Logistic**

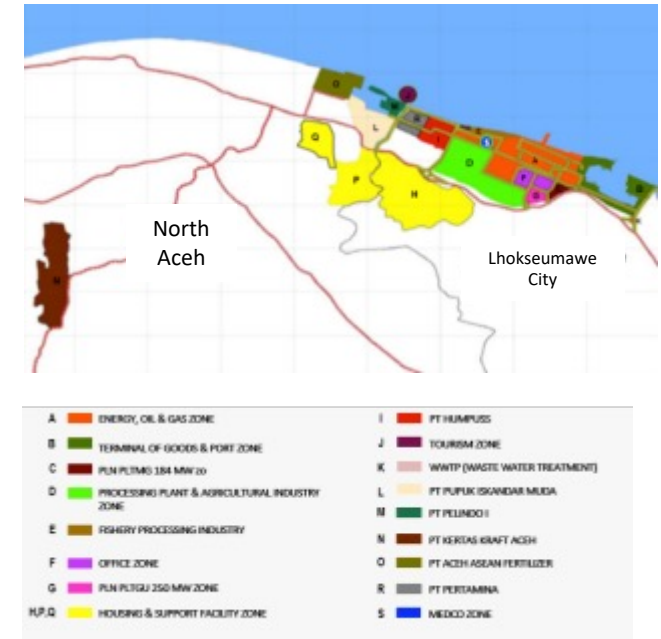
INFRASTRUCTURE

-  13 km from **Malikussaleh Airport**
-  **Krueng Geukueh Seaport** is integrated into the Zone
-  Road is **fully constructed** with several sector need minor maintenance

ON SITE INFRASTRUCTURE

-  164,75 km road inside zone
-  Power plant/ electricity 490 MV (PLN, PIM, PAG)
-  Clean water with capacity of 1500 m³ or 14.46 liter/second
-  Waste water treatment plant 5200 m³/day
-  Firefighter: 147 hydrant/ 6 units of car
-  Garbage facilities area 6 Ha & 3 units of transportation facilities (truck)

MASTERPLAN



A	ENERGY, OIL & GAS ZONE	I	PT HUMLUSS
B	TERMINAL OF GOODS & PORT ZONE	J	TOURISM ZONE
C	PLN PELINDO 134 MW ZONE	K	WWTP (WASTE WATER TREATMENT)
D	PROCESSING PLANT & AGRICULTURAL INDUSTRY ZONE	L	PT PUPUK ISKANDAR MUDA
E	FISHERY PROCESSING INDUSTRY	M	PT PELINDO I
F	OFFICE ZONE	N	PT KERJASAMA ACEH
G	PLN PELINDO 250 MW ZONE	O	PT ACEH ASEAN FERTILIZER
H,P,Q	HOUSING & SUPPORT FACILITY ZONE	R	PT PERTAMINA
		S	NKKDD ZONE

Contact Person

Mr. Rustam Efendi, +62 811 673 250 16

Galang Batang

Bintan Regency, Riau Islands Province




LOCATION





PROFILE

-  **LEGAL BASIS**
Government Regulation (PP) Number 42 of 2017
-  **Officially Operated**
December 8th 2018
-  **DEVELOPER**
PT GBKEK Industri Park
-  **AREA**
2,333. 6 Ha
Land Availability
1100 Ha (estimated)
-  **LOCATION**
1 hour from Singapore
-  **REGIONAL MIN. WAGE**
IDR 3,6 Million








BUSINESS OPPORTUNITY

-  **Bauxite Industry**
-  **Alumina Industry**
-  **Logistic**

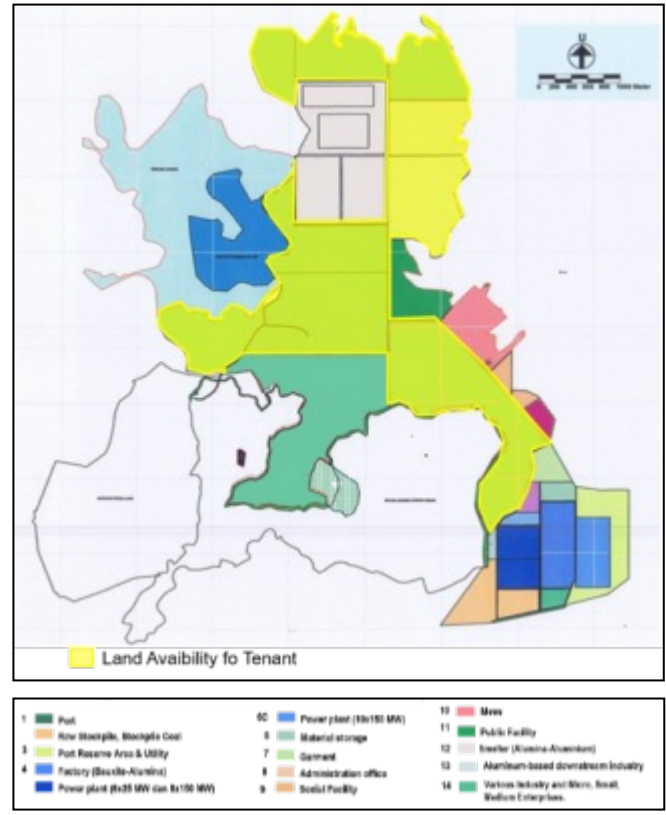
INFRASTRUCTURE

-  20 km from Raja Haji Fisabilillah Airport
-  **Seaport** is integrated into the Zone
-  **8 km** hot asphalt access road

ON SITE INFRASTRUCTURE

-  Refinery Alumina 2 million ton/year
-  Steam-electric power station 6 x 25 MW
-  Water Reservoir 5 million m³
-  Seaport
-  Coal Gas Plant
-  Road
-  Executive Housing

MASTERPLAN



Contact Person
Mr. Santony, +62 812-8798-8283

Gresik

Gresik Regency, East Java Province






LOCATION



PROFILE

-  **LEGAL BASIS**
Government Regulation (PP) Number 71 of 2021
-  **DEVELOPER**
PT Berkah Kawasan Manyar Sejahtera (PT BKMS)
-  **AREA**
2.167 Ha
- Land Availability**
1.065,15 Ha
-  **LOCATION**
1 hour from Surabaya
-  **REGIONAL MIN. WAGE**
IDR 4,3 Million






BUSINESS OPPORTUNITY

-  **Metal Industry** (copper and steel smelters)
-  **Energy Industry**
-  **Electronic Industry**
-  **Logistic**
-  **Chemical Industry**

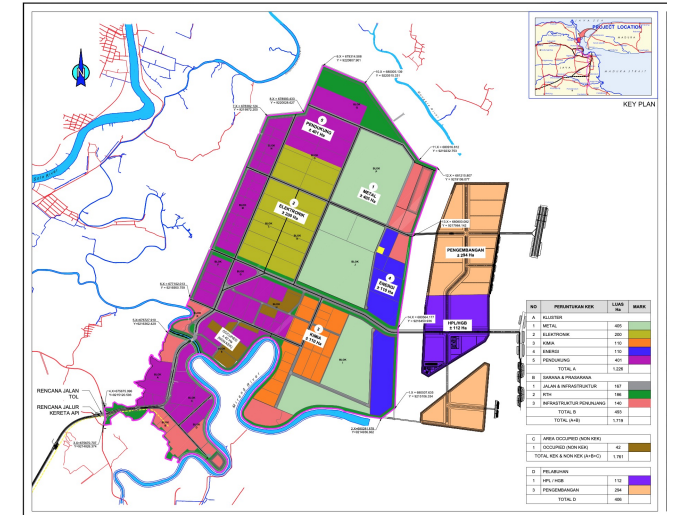
INFRASTRUCTURE

-  55 km from **Juanda International Airport**
-  - 10 km from **Duduk Station**
- Planned railway depot connected to Duduk Station, connected by the end of 2024
-  Connected with:
- Manyar Toll Gate (KLBM) is 3.5 km
- Connected with arterial road access to Gresik, Surabaya and Tuban (Dendels road)
- Connected to the Manyar toll gate (KLBM) plan at the end of 2021
-  Connected to **PGN's gas pipeline** with a capacity of 143.5 MMSCFD

ON SITE INFRASTRUCTURE

-  Clean Water
-  - Integrated with **JIIPE Seaport**
- 27 km from Tj. Perak Seaport
-  Gas and Steam Power Plant with capacity of 23 MW
-  - The 80 m row area road is fully constructed along 2,076 Km and ROW 30 m along 0.76 Km
- 1 Km of area road will be built in 2021
-  WWTP with capacity of 2500 m3/day

MASTERPLAN



Contact Person

Mr.Akira Takami (+62) 21 2567 4562;
overseas@bkms.jiipe.co.id

Palu

Palu City, Central Sulawesi Province

LOCATION



PROFILE



LEGAL BASIS
Government Regulation (PP) Number 31 of 2014
Officially Operated :
September 27, 2017



DEVELOPER
PT Bangun Palu Sulawesi Tengah (BPST)



AREA
1,500 Ha



POPULATION
Palu City: 367.342
People

BUSINESS OPPORTUNITY



Base Metal Industry



Logistic

INFRASTRUCTURE



26 km from **Mutiara SIS Al Jufri Airport**



1 km from **Pantoloan Seaport**



- 1,2 km road inside zone is **fully constructed**
- **Pantoloan Flyover**

ON SITE INFRASTRUCTURE



1,2 km Road inside zone



Electricity: 20 MW



Clean water: 15 liter/second

MASTERPLAN



Contact Person

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infocenter@kekpalu.com

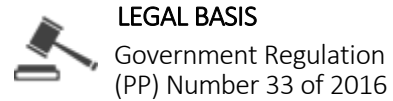
Sorong

Sorong Regency, West Papua Province

LOCATION



PROFILE



LEGAL BASIS

Government Regulation (PP) Number 33 of 2016

Officially Operated :
October 11th, 2019



DEVELOPER

PT Malamoi Olom Wobok (MOW)



AREA

523,7 Ha



POPULATION

Sorong: 82,784 People

BUSINESS OPPORTUNITY



Nickel Smelter Industry



Palm Oil Industry



Forestry (Sago) Industry



Logistic

INFRASTRUCTURE



30 km from Domine Eduard Osok Airport



- Arar Seaport is integrated into the Zone and under construction
- 35 km from Port of Sorong



Road is **fully constructed** with several sector need minor maintenance

ON SITE INFRASTRUCTURE



Road inside zone is **fully constructed**

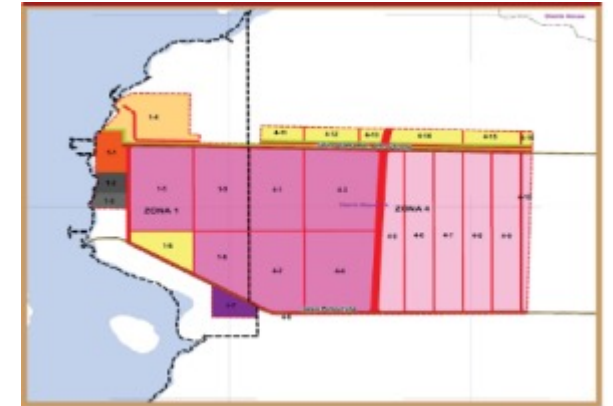


Gas Engine Power Plant: 2x30 MVA



Clean water and Raw water network

MASTERPLAN



Available:	Occupied:	Stock Pile Zone Plan	Bulk Cement Industry
Big Industrial Zone Plan	Roro Port Zone		
Middle Industrial Zone Plan	Petrochina Industry	Public Facility, Social & Office Zone	Asphalt Industry

Contact Person

Mr. Gabriel Simanjuntak, +62 813-8851-2234

Kendal

Kendal Regency, Central Java Province

LOCATION



PROFILE

LEGAL BASIS
Government Regulation (PP)
Number 85 of 2019

DEVELOPER
PT Kawasan Industri Kendal

AREA
1,000 Ha
Land Availability
530 Ha (estimated)

LOCATION
20 km from Semarang

REGIONAL MIN. WAGE
IDR 2,3 Million

BUSINESS OPPORTUNITY

- Textile & Clothing Industry
- Automotive Industry
- Furniture & Toy Industry
- Electronic Industry
- Food & Beverage Industry
- Logistic

INFRASTRUCTURE

23 km from **Ahmad Yani Airport**

27 km from **Tanjung Emas Seaport**

Passed by **Semarang – Pejagan Toll Road and Pantura Road**

ON SITE INFRASTRUCTURE

- Firefighter
- Electricity
- Waste water treatment plant
- Water treatment plant
- Fiber optic
- Road

MASTERPLAN



- Toll road
- Toll road plan
- Railway
- Gas pipeline
- Proposed gas pipeline
- Railway
- Proposed railway



Contact Person
Ms. Juliani +62 822-6605-0051





Maloy Batuta Trans Kalimantan

East Kutai Regency, East Kalimantan Province



LOCATION



PROFILE

-  **LEGAL BASIS**
Government Regulation (PP) Number 85 of 2014
Officially Operated :
April 1st 2019
-  **DEVELOPER**
PT Maloy Batuta Trans Kalimantan
-  **AREA**
557.34 Ha
-  **POPULATION**
East Kutai: 833,625 People









BUSINESS OPPORTUNITY

-  **Palm Oil Industry**
-  **Energy Industry**
-  **Logistic**
-  **Wood Processing Industry**

INFRASTRUCTURE

-  - 118 km from **Tanjung Bara Airport**
- 280 km from **APT Pranoto Airport**
- 406 km from **Sultan Aji Muhammad Sulaiman Sepinggan Airport**
-  Multipurpose **Maloy Seaport** inside in SEZ is under construction (operating in 2019)
-  11.44 km **access road**




ON SITE INFRASTRUCTURE

-  Road
-  Electricity: 30 MW
-  SPAM Maloy with capacity of 200 liter/second
-  Telecommunication tower
-  Firefighter building
-  Administrator office
-  Mosque
-  Workshop building

MASTERPLAN



Legend :

	Other Industry Zone		Biodiesel Industry Zone		Treatment Zone
	Basic Oleochemical Zone		By-product Zone		Food Based Zone

Contact Person
Mr. Abi, 0811-550-175 22

Bitung

Bitung City, North Sulawesi Province




LOCATION



PROFILE

-  **LEGAL BASIS**
Government Regulation (PP) Number 32 of 2014
Officially Operated :
April 1, 2019
-  **DEVELOPER**
PT Membangun Sulut Hebat (MSH)
-  **AREA**
534 Ha
-  **POPULATION**
Bitung City: 212,409 People




BUSINESS OPPORTUNITY

-  **Coconut Processing Industry**
-  **Fishery Industry**
-  **Logistic**

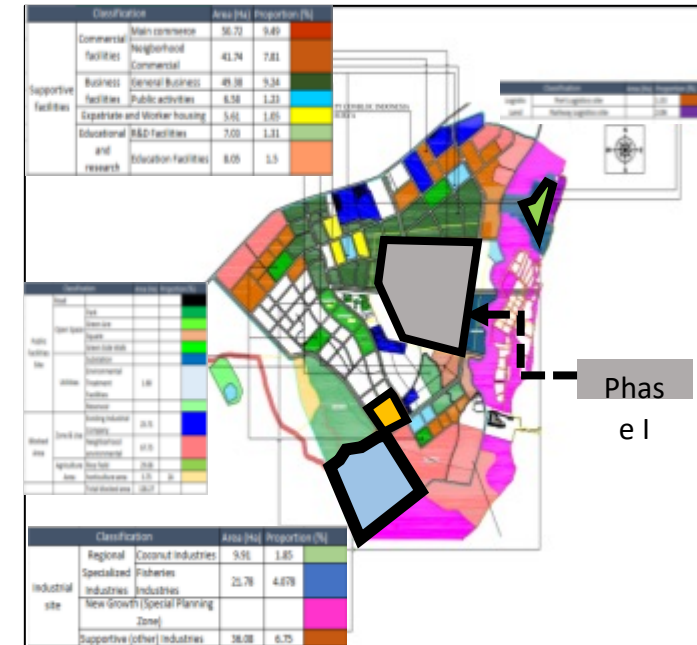
INFRASTRUCTURE

-  36 km from **Sam Ratulangi Airport**
-  7 km from **Perikanan Samudera Seaport**
-  415 m road inside zone is **fully constructed**

ON SITE INFRASTRUCTURE

-  415 m road inside zone is **fully constructed**
-  Electricity : 30 MW
-  Clean water : 15 liter/second

MASTERPLAN



Contact Person
Mr. Jefferson Lungkang +62 811-430-751

Morotai

Morotai Island Regency, North Maluku Province




LOCATION



PROFILE

-  **LEGAL BASIS**
Government Regulation (PP) Number 32 of 2014
Officially Operated :
April 1st , 2019
-  **DEVELOPER**
PT Jababeka Morotai
-  **AREA**
1,101.76 Ha
-  **POPULATION**
Morotai Island: 74,436 People (2020)








BUSINESS OPPORTUNITY

-  **Tourism**
-  **Fishery Industry**
-  **Logistic**

INFRASTRUCTURE

-  23 km from **Lombok International Airport**
-  46 km from **Lembar Seaport**
-  11 km road inside zone is **fully constructed**

ON SITE INFRASTRUCTURE

-  Small and medium enterprises shops
-  Administrator office
-  Gate
-  Road
-  Homestay
-  Clean Water
- Available: 9.25 liter/second (pump well)
- Future capacity: 30 liter/second
-  Electricity
- Available: 106 kVa
- Future Capacity : 180 MW (2020)

MASTERPLAN



Contact Person
Mr. Windy, +62 812 94289856

Sei Mangkei

Simalungun Regency, North Sumatra Province

LOCATION



PROFILE



LEGAL BASIS
Government Regulation
(PP) Number 29 of 2012

Officially Operated:
January 27, 2015



DEVELOPER
PT Perkebunan Nusantara III



AREA
2,002.77 Ha
Land Availability
1.066,93 Ha (estimated)



LOCATION
2 hours from Medan via toll road



REGIONAL MIN. WAGE
IDR 2,4 Million

BUSINESS OPPORTUNITY



Palm Oil Industry



Tourism



Rubber Industry



Logistic

INFRASTRUCTURE



±115 km from
Kualanamu Airport



±50 km from
Kuala Tanjung Seaport



Road inside zone is **fully constructed**

ON SITE INFRASTRUCTURE



Dryport capacity 2300 TEUs



Tank Farm: - 8000 Ton CPKO
- 25000 Ton CPO



Firefighter 5m³



Dump Truck capacity 24 m³



Gas pipe capacity 75 MMSCFD



Electrical distribution substation
with a capacity of 60 MVA

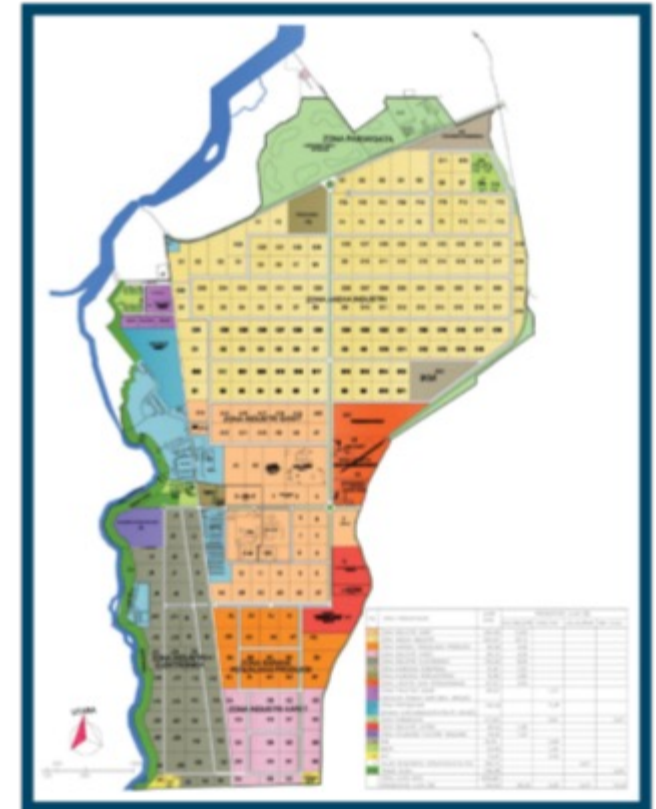


Sewage liquid waste 250 m³/hour



Clean water 250 m³/hour

MASTERPLAN



Contact Person
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THANK YOU