



EMBASSY OF THE  
REPUBLIC OF INDONESIA  
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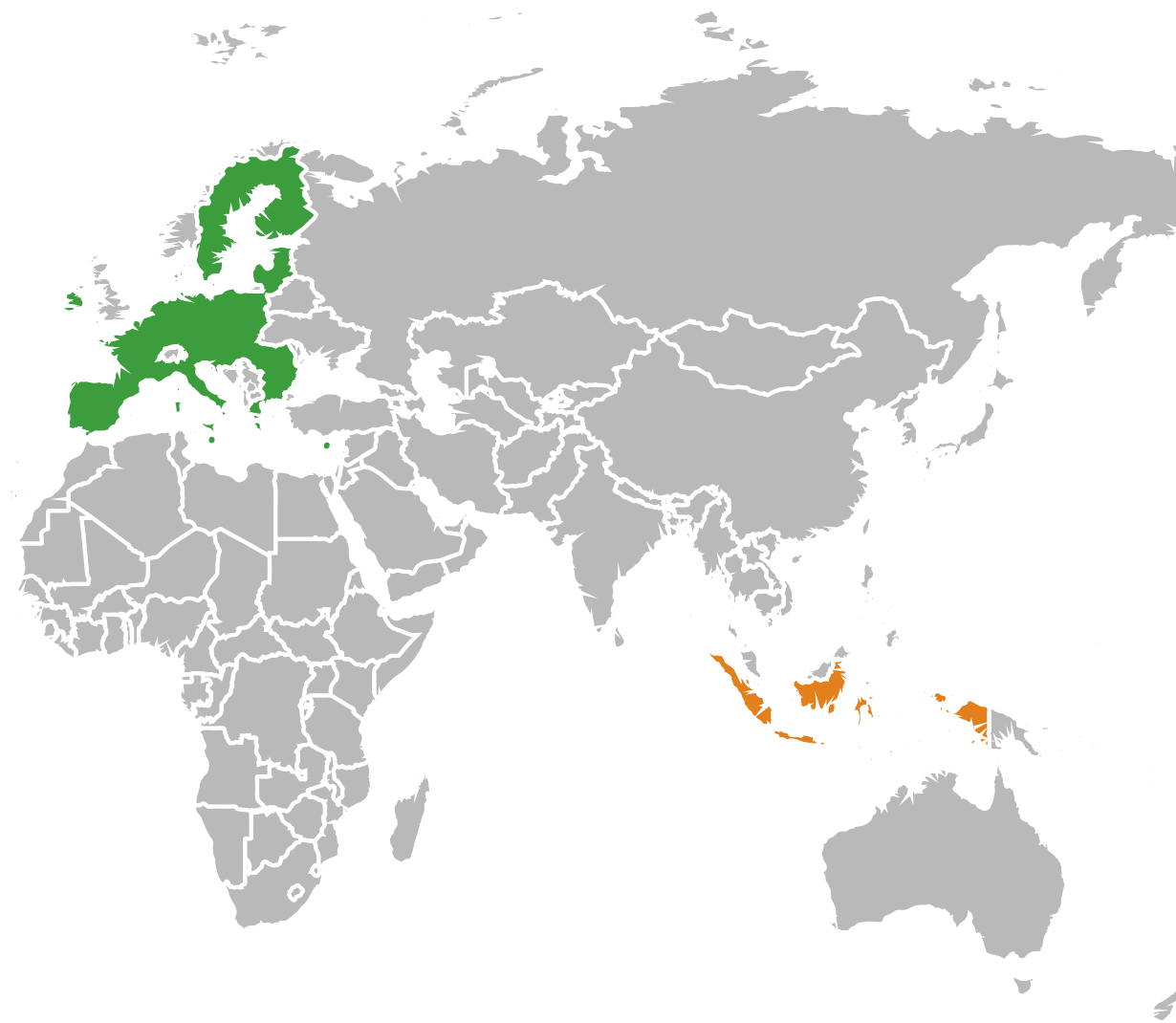


# Indonesia

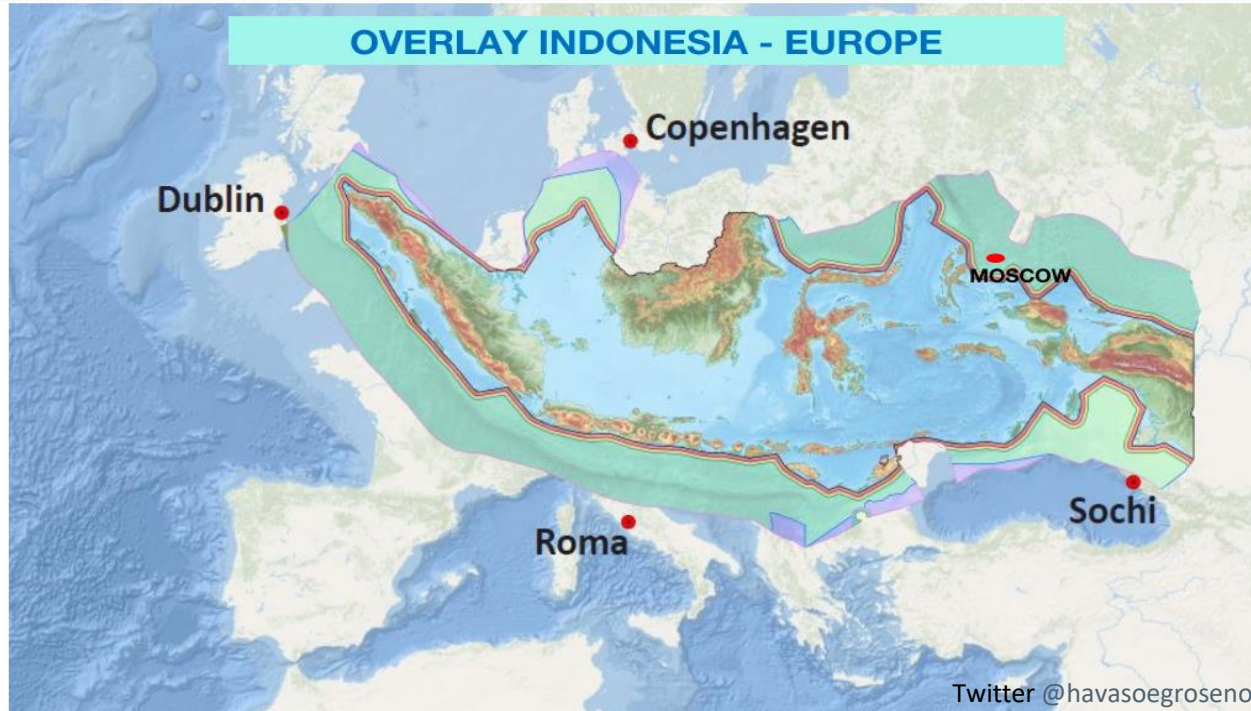
is

# B.I.G

“**B**oosting green **I**nfrastructure as **G**rowth driver”



# Indonesia is a key player on the global stage--large size, strategic location, and rich natural resource endowment



*Largest archipelagic in a strategic location with the world's fourth largest population*



17,500 islands with  
**+108,000 km** of coastline



Population of **278 million** people



Located along major sea lanes connecting East Asia, South Asia and Oceania

*Rich in energy transition mineral reserves and high RE potential*



World's biggest nickel reserves



World's 2<sup>nd</sup> biggest tin reserves



6<sup>th</sup> biggest bauxite reserves



7<sup>th</sup> biggest copper reserves



437.4 GW of potential RE<sup>1</sup>

# Despite Global Turmoil, Indonesia's Macroeconomic Indicators are one of The Best in G20 Countries

## Strong Economic Growth

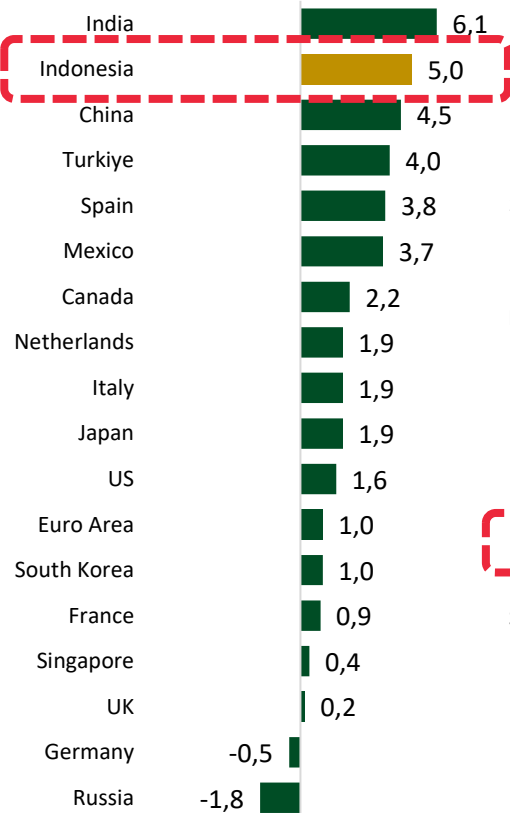
## Low Inflation rate

## Low Government Debt

## Stable Stock Performance

## Stable Exchange Rate

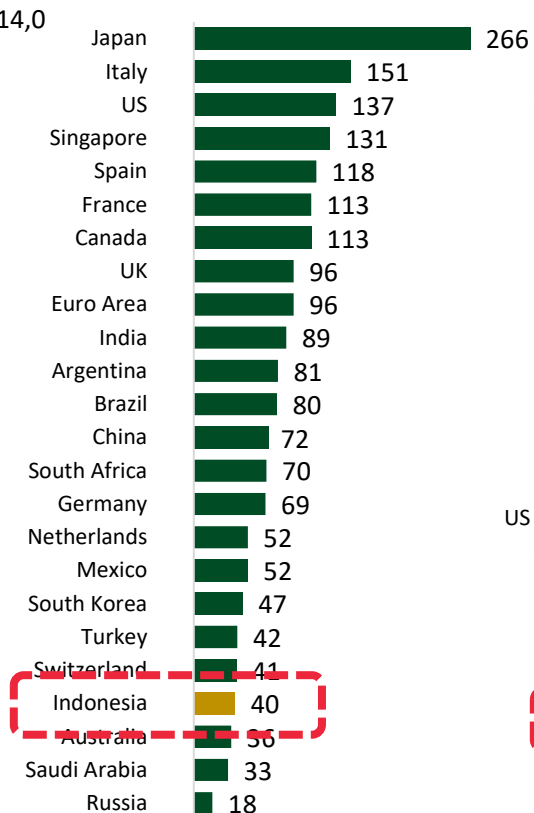
GDP Growth% 1Q23 - G20 Countries



Latest Inflation% - G20 Countries



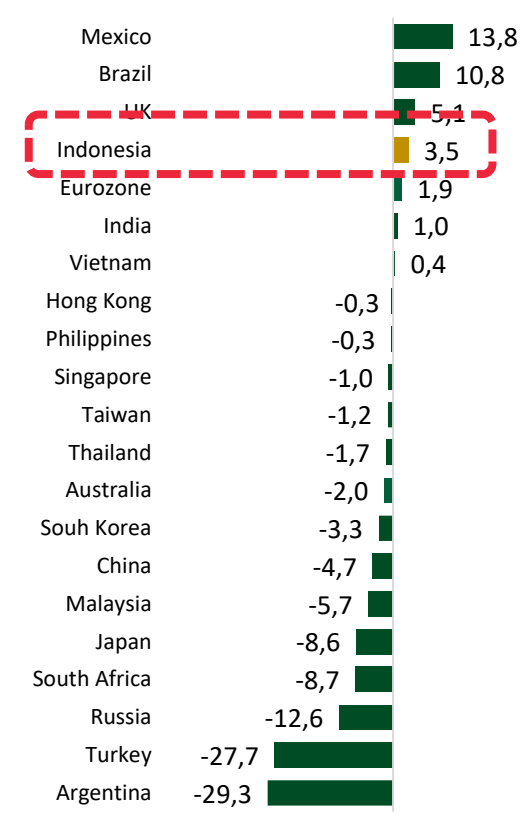
Gov Debt to GDP% 2022 - G20 Countries



Stock Index YTD2023 - G20 Countries



Exchange Rate YTD2023 - G20 Countries

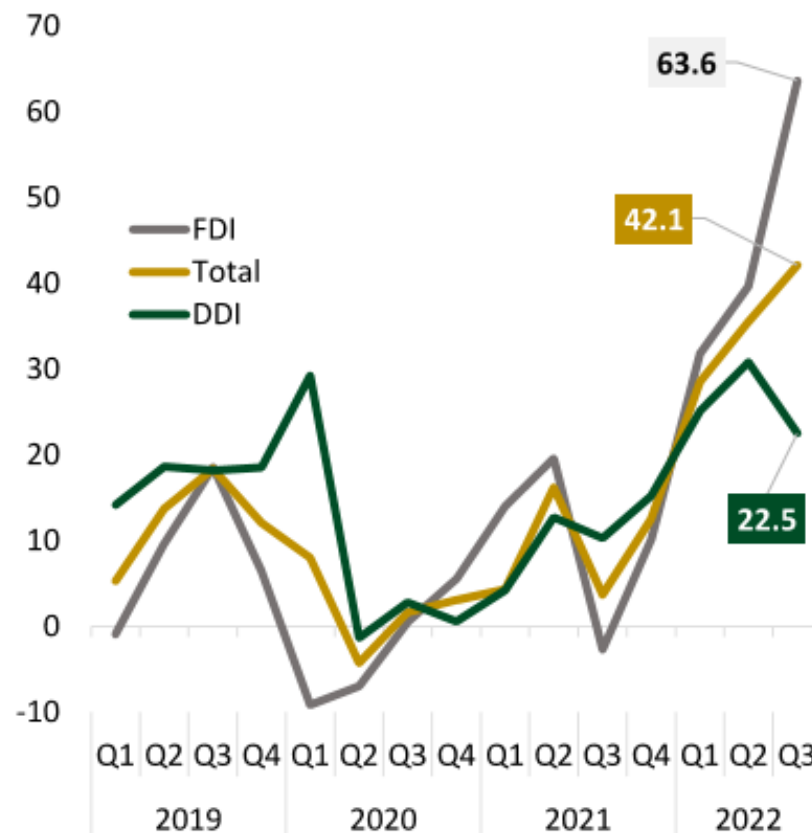


# Driven by Strong Macroeconomic Performance, Including Stable Investment Performance and Strong Export Growth

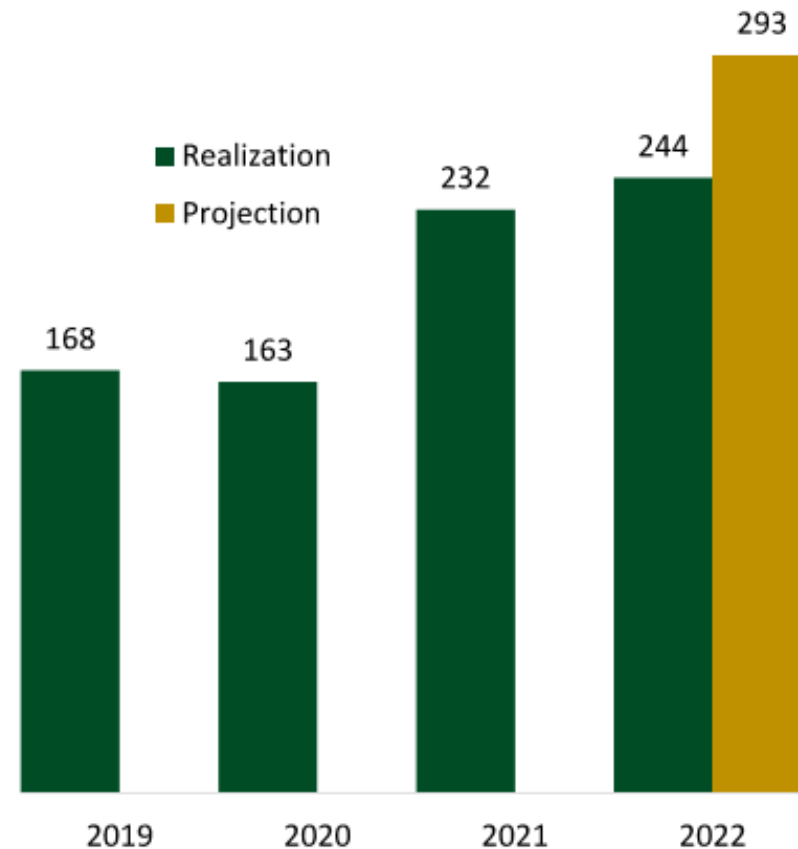
## Stable Investment Performance: Capable of Double-digit Growth

## High Exports: Recorded a Surplus of 30 Consecutive Months

**Investment Realization**  
(percent, yoy)

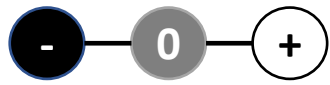


**Indonesia's Export**  
(USD Billion)



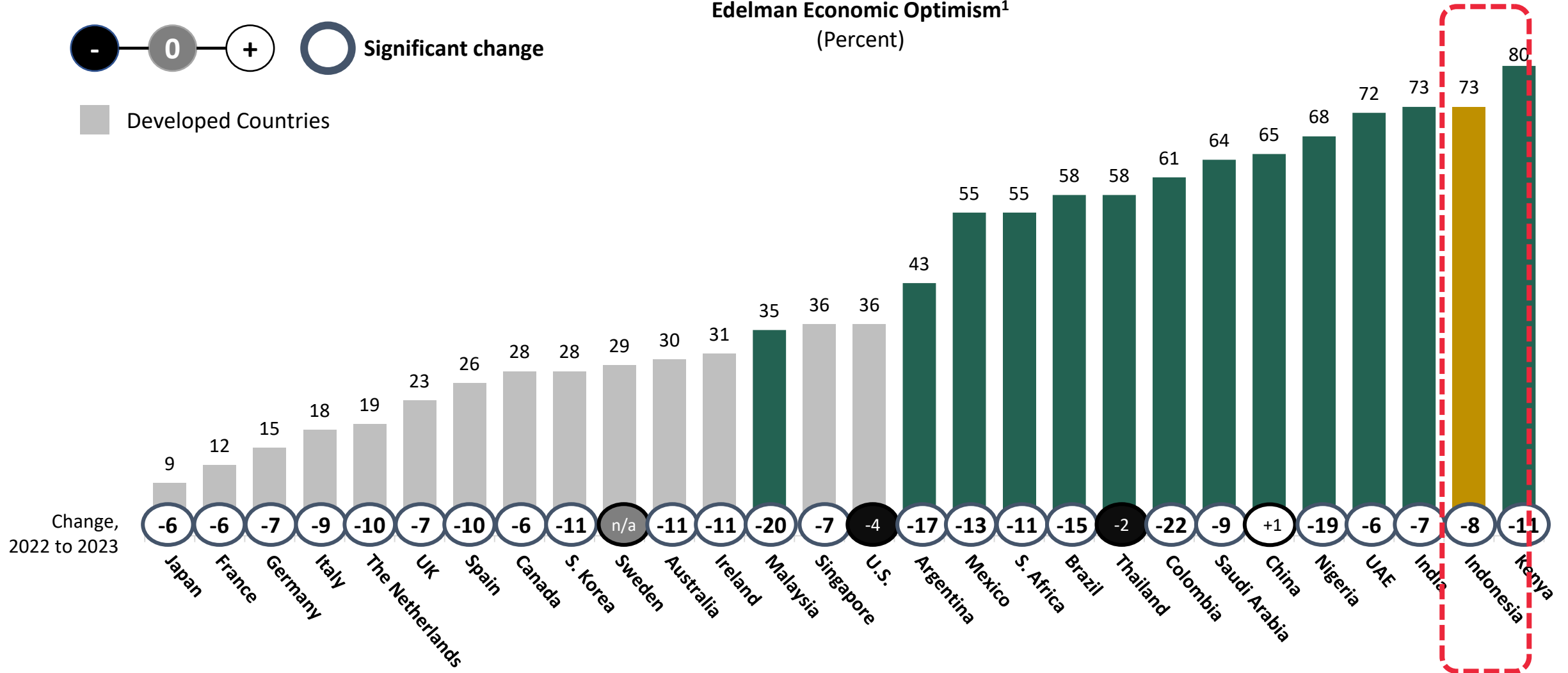
# Indonesia Is Ranked Second In The List Of Countries With a High-Level of Economic Optimism

Edelman Economic Optimism<sup>1</sup>  
(Percent)



○ Significant change

■ Developed Countries



1. Percent who say my family and I will be better off in five years  
Source: Edelman Trust Barometer, 2023

# Indonesia will continue to leverage green growth initiatives as the driver of its economic growth and welcomes collaboration with global players



## Drivers of Indonesia's green growth

**Large-scale deployment of renewables** and accelerated CFPP retirement

**Accelerating EV adoption** and proliferation of EV charging network

Developing **low-carbon liquid fuels** to reduce emissions in hard-to-abate sectors

Building EV battery and solar PV **manufacturing value chains**

Leveraging **forest and geological carbon sinks** to remove and store CO<sub>2</sub> emissions

## Targeted Sectors



Agriculture



Waste



Industry



FOLU



Energy



How global players can partner with Indonesia  
~~Providing low-interest and concessional~~  
**finance** to green economy projects

Providing **offtake agreements** for low-carbon industrial products

**Technology transfer** for the latest low-carbon tech developments

Supporting **capability building initiatives** for Indonesia's workforce development

Engage in **joint projects and studies** to identify new decarbonization opportunities



- To achieve net zero emissions by 2060, Indonesia is trying to make an energy transition from fossil fuels to renewable energy
- Indonesia has high potential for new renewable energy, but only 11.61 GW has been installed (mostly hydro)



# Energy Needs for Industrial Estate and Special Economic Zones (SEZ)

**1. KEK Arun Lhokseumawe**  
Aceh Utara & Lhokseumawe, Aceh  
(PP No. 5/2017 - Februari 2017)  
Beroperasi Desember 2018  
Kegiatan Utama:  
- Industri Energi  
- Industri Petrokimia dan Kimia Lainnya  
- Industri Pengolahan Kelapa Sawit  
- Industri Pengolahan Kayu  
- Logistik

**2. KEK Sei Mangkei**  
Kab. Simalungun, Sumatera Utara  
(PP No. 29/2012 - Februari 2012)  
Beroperasi Januari 2015  
Kegiatan Utama:  
- Industri Pengolahan Kelapa Sawit  
- Industri Pengolahan Karet  
- Pariwisata  
- Logistik

**3. KEK Batam Aero Technic**  
Kota Batam, Kepulauan Riau  
(PP No. 67/2021 - Juni 2021)  
Kegiatan Utama:  
- Industri MRO (Maintenance, Repair, Overhaul) Pesawat

**4. KEK Nongsa**  
Kota Batam, Kepulauan Riau  
(PP No. 68/2021 - Juni 2021)  
Kegiatan Utama:  
- IT-digital  
- Pariwisata

**5. KEK Galang Batang**  
Kab. Bintan, Kepulauan Riau  
(PP No. 42/2017 - Oktober 2017)  
Beroperasi Desember 2018  
Kegiatan Utama:  
- Industri Pengolahan Bauksit  
- Logistik

**11. KEK Singhasari**  
Kab. Malang, Jawa Timur  
(PP No. 68/2019 - September 2019)  
Kegiatan Utama:  
- Pariwisata  
- Pengembangan Teknologi

**12. KEK Sanur**  
Denpasar, Bali  
(PP No. 41/2022 - November 2022)  
Kegiatan Utama:  
- Kesehatan  
- Pariwisata

**13. KEK Mandalika**  
Kab. Lombok Tengah, NTB  
(PP No. 52/2014 - Juni 2014)  
Beroperasi Oktober 2017  
Kegiatan Utama:  
- Pariwisata

**14. KEK MBTK**  
Kab. Kutai Timur, Kalimantan Timur  
(PP No. 85/2014 - Oktober 2014)  
Beroperasi April 2019  
Kegiatan Utama:  
- Industri Pengolahan Kelapa Sawit  
- Industri Energi  
- Logistik

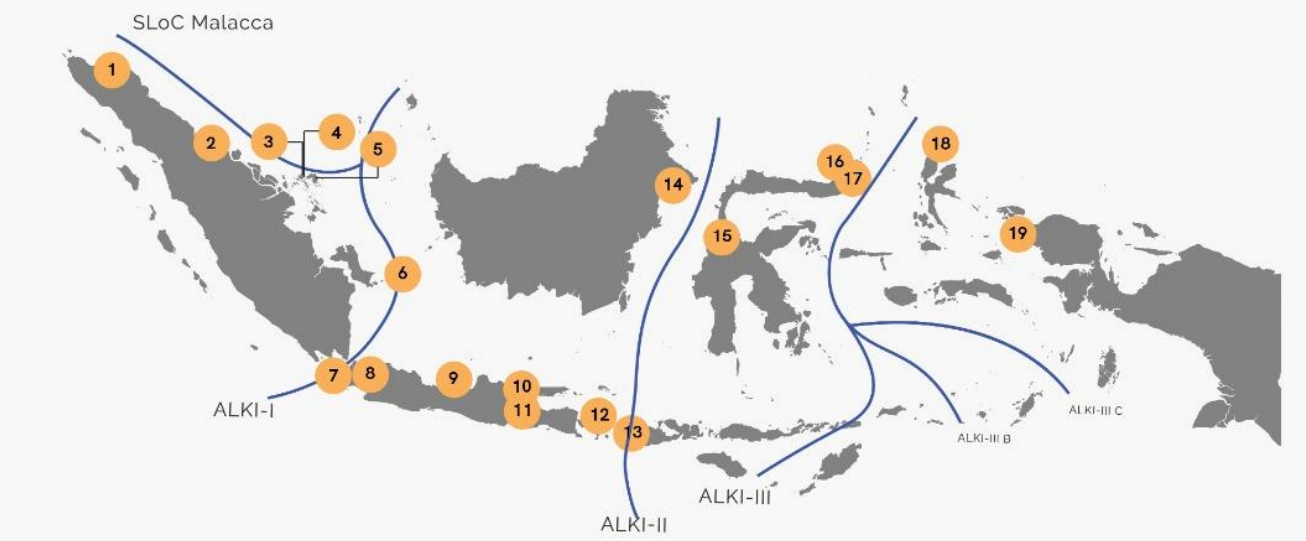
**15. KEK Palu**  
Kota Palu, Sulawesi Tengah  
(PP No. 31/2014 - Mei 2014)  
Beroperasi September 2017  
Kegiatan Utama:  
- Industri Logam Dasar  
- Logistik

**16. KEK Likupang**  
Kab. Minahasa Utara, Sulawesi Utara  
(PP No. 84/2019 - Desember 2019)  
Kegiatan Utama:  
- Pariwisata

**17. KEK Bitung**  
Kota Bitung, Sulawesi Utara  
(PP No. 32/2014 - Mei 2014)  
Beroperasi April 2019  
Kegiatan Utama:  
- Industri Pengolahan Kelapa  
- Industri Pengolahan Perikanan  
- Logistik

**18. KEK Morotai**  
Kab. Pulau Morotai, Maluku Utara  
(PP No. 50/2014 - Juni 2014)  
Beroperasi April 2019  
Kegiatan Utama:  
- Industri Pengolahan Perikanan  
- Pariwisata  
- Logistik

**19. KEK Sorong**  
Sorong, Papua Barat  
(PP No. 31/2016 - Agustus 2016)  
Beroperasi Oktober 2019  
Kegiatan Utama:  
- Industri Pengolahan Nikel  
- Industri Pengolahan Kelapa Sawit  
- Industri Hasil Hutan dan Perkebunan (Sagu)  
- Logistik



**6. KEK Tanjung Kelayang**  
Kab. Belitung, Bangka Belitung  
(PP No. 6/2016 - Maret 2016)  
Beroperasi Maret 2019  
Kegiatan Utama:  
- Pariwisata

**7. KEK Tanjung Lesung**  
Kab. Pandeglang, Banten  
(PP No. 26/2012 - Februari 2012)  
Beroperasi Februari 2015  
Kegiatan Utama:  
- Pariwisata

**8. KEK Lido**  
Bogor, Jawa Barat  
(PP No. 69/2021 - Juni 2021)  
Kegiatan Utama:  
- Pariwisata  
- Industri Kreatif

**9. KEK Kendal**  
Kab. Kendal, Jawa Tengah  
(PP No. 85/2019 - Desember 2019)  
Beroperasi Mei 2021  
Kegiatan Utama:  
- Industri Tekstil dan Busana  
- Industri Furnitur dan Alat Permainan  
- Industri Makanan dan minuman  
- Industri Otomotif  
- Industri Elektronik  
- Logistik


**10. KEK Gresik**  
Kab. Gresik, Jawa Timur  
(PP No. 71/2021 - Juni 2021)  
Kegiatan Utama:  
- Industri Metal  
- Industri Elektronik  
- Industri Kimia  
- Industri Energi  
- Logistik

| Type                   | Total Potential (MW) |
|------------------------|----------------------|
| Geothermal             | 8218                 |
| Wind                   | 25013                |
| Water                  | 20775                |
| Solar                  | 110140               |
| Ocean Current          | 15062                |
| Biogas                 | 14516                |
| Waste                  | 225                  |
| Microhydro & Minihydro | 9649                 |

Considering the potential of renewable energy sources in the SEZ location province, the difference between electricity demand in the coming year and current availability opens up opportunities for the development of power plants around SEZ. This opportunity opens investment opportunities both in the electricity supply and business activities

# There is a ripe opportunity to invest in Indonesia's EV ecosystem due to its automotive market, government support, and natural resources



## Large auto market and ambition EV targets

| Vehicle type   | Total fleet | 2030 EV fleet targets | Current EV production capacity |
|--|-------------|-----------------------|--------------------------------|
|  Passenger cars | 20.9 mn     | 2 mn                  | 14 k / year                    |
|  Motorcycles    | 121.2 mn    | 13 mn                 | 1 mn / year                    |

## Strong government support

| Presidential Regulation No 55 of 2019  | Presidential Instruction No 7 of 2022  | SOE Ministry Circular Letter (S-565/MBU/09/2022)                        |
|--|--|---|
| Acceleration of the Battery Electric Vehicle (BEV) Program for Road Transportation | Use of BEV as Operational and Individual Service Vehicles for Central and Local Government | Support for the Acceleration of the BEV Program for Road Transportation |

## Abundant resources for EV batteries

|  |   |  |
|--|---|--|
|  <b>#1</b> in the world for Nickel reserves |  <b>#6</b> in the world for Bauxite reserves |  <b>#7</b> in the world for Copper reserves |
|--|---|--|



# North Kalimantan Industrial Estate Will Be the Biggest Green Industrial Park in the World



| Project                      | Capacity/ Year   | Capex (US\$ Bn) | Revenue/ Year (US\$ Bn) |
|------------------------------|------------------|-----------------|-------------------------|
| Petrochemical                | 4*16 Million ton | 56.0            | 67.0                    |
| Aluminum smelter             | 1,5 Million ton  | 8.0             | 7.5                     |
| Steel                        | 5 Million Ton    | 1.7             | 2.1                     |
| New Energy Battery           | 265 GwH          | 43.0            | 26.5                    |
| Industrial Silicon           | 1,2 Million Ton  | 8.3             | 3.7                     |
| Polycrystalline Silicon      | 0,2 Million Ton  | -               | 6.2                     |
| Land & Auxiliary Facilities* | -                | 15.0            | -                       |
| <b>Total</b>                 | -                | <b>132.0</b>    | <b>113.0</b>            |

|  |   |
|--|---|
| <b>Project Owner and Shareholder Structure</b> | <ul style="list-style-type: none"> <li>PT. Kalimantan Industrial Park Indonesia (PT KIPI) for the Green Industrial Park dan Affiliates (Blue Industrial Park)</li> </ul>  |
| <b>Investment and Output Value</b>             | <ul style="list-style-type: none"> <li>Investments : US\$ 132.0 Billion (until 2029)</li> <li>Output Value : US\$ 113.0 Billion</li> </ul>  |
| <b>Work Force</b>                              | <ul style="list-style-type: none"> <li>Construction : 100.000 employees</li> <li>Operation : 60.000 employees</li> </ul>  |
| <b>Area</b>                                    | <ul style="list-style-type: none"> <li>Area : 16,400 Ha with the potential to add to 19,000 ha in phase I dan 30,000 Ha in phase II</li> </ul>  |
| <b>Type of Industry Built</b>                  | <ul style="list-style-type: none"> <li>Green Aluminum, Steel, Polysilicon, Graphite</li> <li>New Energy Battery (Nickel Based dan LFP)</li> <li>Petrochemicals</li> <li>Solar Panel</li> </ul>  |
| <b>Industrial Estate Facilities</b>            | <ul style="list-style-type: none"> <li>Port</li> <li>Airport</li> <li>Hotel and Employee Accommodation</li> <li>Polytechnic and Job Training Center</li> </ul>  |
| <b>Energy Source</b>                           | <ul style="list-style-type: none"> <li>Hydropower (10GW) and Solar Cell (10GW) for the <i>Green</i> area (KIPI) and Coal-fired Power Plant for the transition.</li> <li>Natural gas and other energy sources for the <i>blue</i> Industrial Park</li> </ul> |
| <b>Project Phases</b>                          | <ul style="list-style-type: none"> <li>Construction start : 2021</li> <li>Commercial Operation : 2023 (first)</li> </ul>  |

# Opportunity in pharma and medical device to cater the demand

## I. Why Invest in Indonesia Health Industry?

### Rising middle-class population and the rise of middle-class household income

- Upcoming demographic bonus
- Rising middle class lifestyle with increasing lifestyle-related diseases
- Rising health awareness in the general public

### Universal Healthcare Coverage as Indonesia's national priority are now supported with enhancement in multiple supporting system

- Indonesian government aim to achieve health system resilience, especially by improving pharma and med-devices sector
- As part of system transformation, Indonesia's Citizen-Health apps, integrating all patients-related records, was launched on August 2022

### Current market structure offers solid growth with lucrative return which are open for majority-stake foreign ownership (as a priority sector)

- Wide market opportunity available to support the growth
- Major players in Indonesia have reported EBITDA Margin up to 33% in the last 5 years

## II. Innovation projects partnering with prominent industry players/institutions

Please feel free to explore further details by reaching out to us

### PHARMACEUTICAL

1. **Papilloguard (HPV Vaccine)** by Etana Biotechnologies Indonesia
2. **Kgbio: Upgrade and Expansion of Biologic Manufacturing Facility** by Kgbio (Kalbe Farma Group)
3. **New TB vaccine** by PT Bio Farma (SOE Pharma Holding Co)
4. **Human Papillomavirus Vaccine (HPV)** by PT Bio Farma
5. **Measles Rubella (MR) Vaccine** by PT Bio Farma
6. **Indonesia Propolis for Therapy of COVID-19** by Universitas Indonesia

### MEDICAL DEVICES

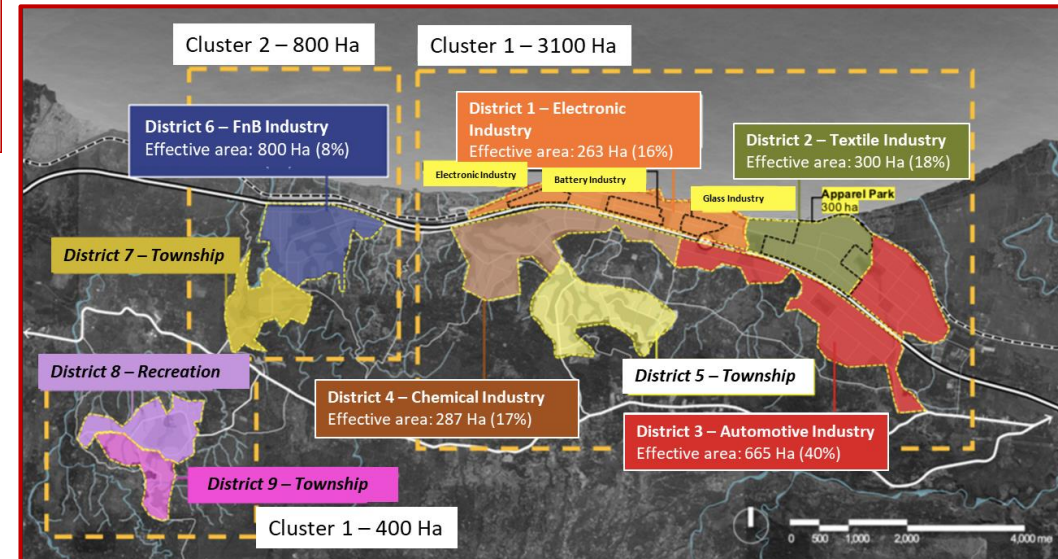
7. **Dialyser Project** by PT Forsta Kalmedic Global
8. **ViuMe** by PT PathGen Diagnostik Teknologi
9. **ColoMelt-Dx and PulmoAmp-Dx** by PT PathGen Diagnostik Teknologi
10. **HPV and EBV Cancer-associated infection molecular Screening Test** by PT PathGen Diagnostik Teknologi
11. **Cancer Prediction Model for Clinical Decision Support** by PT PathGen Diagnostik Teknologi
12. **CentriFlo High Flow Oxygen Therapy Device** by Universitas Indonesia
13. **Ventilator for ICU** by Universitas Indonesia

**Disclaimer:**

LPS/DIC's role is to support the Bloomberg CEO Forum, a part of the G20 Summit Side Event. All information provided here should not be considered/interpreted/understood as a form of guarantee to obtain an investment offer, commitment and/or agreement. Commitment/agreement regarding investment is entirely the will of the party offering the proposal and the investor/donor.

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## III. Production facilities in Batang Integrated Industrial Zone (KITB) – the strategically located industrial zone



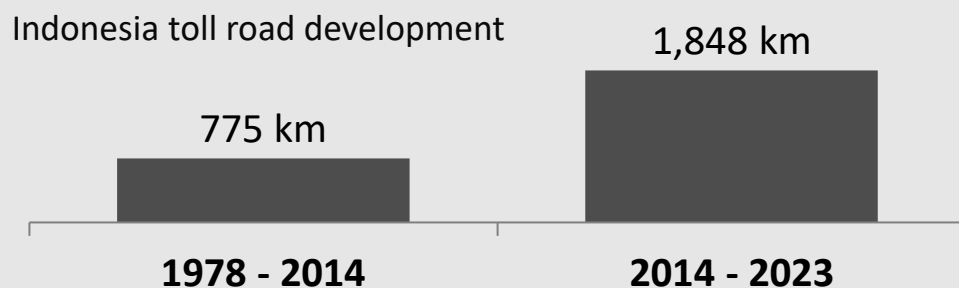
3 domestic medical device companies will set up their plants

- PT Tawada Healthcare;
- PT Jayamas Medika Industri (Onemed); and
- PT Mursmedic Jaya Mandiri

# Indonesia Continues to Strengthen Interconnectivity by Debottlenecking Land Transport

## Indonesia has a concrete toll road development plan...

Indonesia has **accelerated toll road development** significantly in the past 9 years through Trans-Jawa and Trans-Sumatra Toll



**17,864**  
km total toll road

Indonesia has a detailed development plan for a total of **18 thousand km toll road connecting cities in Indonesia by 2050**

Source: Rencana Umum Jaringan Jalan Tol [PUPR](#); Kemenkomarves

## ...supported by solid programs for public transport development

### 1 Indonesia continuing development of public transport



### 2 Strategic National Projects to further develop transportation modes across Indonesia

#### Non-exhaustive



- High speed railway Jakarta – Bandung\*
- Railway KA Airport Yogya – Kulon Progo
- MRT Jakarta North-South \*
- MRT Jakarta East-West \*
- LRT Jakarta, Bogor, Depok \*



- Railway KA Tebing Tinggi-Kuala Tanjung
- Railway KA Prapat-Kota Pinang\*
- LRT Metro Palembang



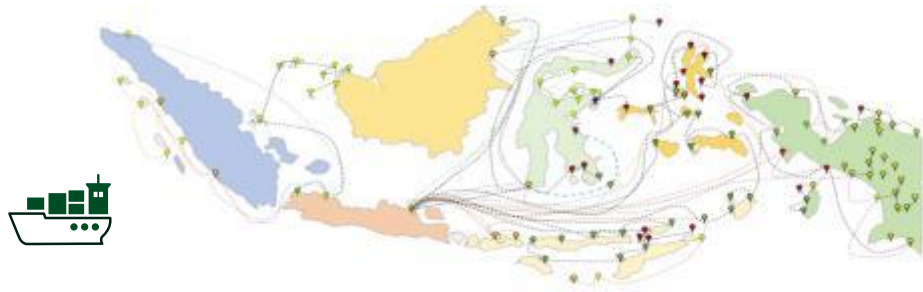
- Railway KA Makassar – Parepare

\*under development

# Indonesia Implements Sea Toll and Air Toll Programs to Connect and Drive Traffic Growth in The Outer Rural Areas

Sea toll program grows the traffic in Eastern Indonesia through interconnectivity and economic supports

Air toll program aims to grow the traffic and transform pioneering into commercial flights



Since 2019, the sea toll program has connected...

...and propelled the growth of cargo in the east

Since 2019, the air toll program has developed pioneering flights across Indonesia

**130**  
seaports

**+60%** (157k)  
ton of cargo

**21**  
coordinating points

**220**  
pioneering passenger routes

**41**  
pioneering cargo routes

**33**  
main sea routes

**+68%** (13)  
fleet

The government continues to subsidize flights operations to transform pioneering into commercial flights (fuels, labor, airport and navigation fee, ground handling, training, etc.)



# Investment Opportunity in New Capital City

**151** → **110**

companies (local and foreign) have stated that they are interested to invest in IKN

letters of intention (LOI) have been received by IKN team with details below:

- 35 Infrastructures and utilities
- 16 Consulting services
- 13 Housing
- 11 Education
- 10 Commercial and mixed-use
- 10 Technology
- 7 Health sector
- 4 State & Private Enterprises
- 3 Goods & Services
- 1 Government Offices

**Super priority sector:** energy, housing, transportation, telco, water treatment and waste management.  
**Priority sector:** township management, technology, medical facility, commercial building, school and university, industrial zone.

Global Investor: 49



Roadmap to Carbon Neutral City



Advanced Air Mobility



Masterplan Smart City Nusantara



Pilot environment and smart city solutions



SDG tokens for development



Quality control for construction, best practices



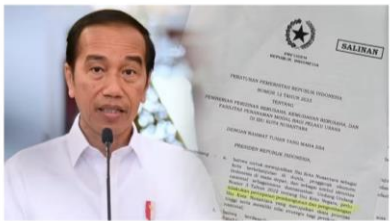
Development in education and health sector

## NIKKEI Asia

### ECONOMY

#### Indonesia's Jokowi approves new list of tax holidays for Nusantara

Capital authority receives 100 letters of intent, including from China, U.S.



Indonesian President Joko Widodo signed a new regulation on March 6 offering tax holidays for investments in Indonesia's planned new capital, Nusantara. (Source photo by AP and Erwida Maulia)

ISMI DAMAYANTI and ERWIDA MAULIA, Nikkei staff writers  
 March 9, 2023 17:57 JST

NUSANTARA/JAKARTA – President Joko "Jokowi" Widodo has approved a new regulation that offers incentives to businesses investing in Indonesia's planned new capital, Nusantara, including tax holidays of up to 30 years and 95 years of

## Government Regulation No. 12 of 2023

- Published in 6 March 2023, **Government Regulation No. 12 of 2023 on Business Licenses, Ease of Doing Business and Incentives on Investment for Private Sectors in Nusantara**, is the implementing regulation as mandated in Law No. 3 of 2022 on New Capital City of Indonesia
- GR 12/2023 consists of 7 chapters and 73 articles: a) **General Provisions**; b) **Business Licenses**; c) **Ease of Doing Business**; d) **Incentives on Investment**; e) **Monitoring**; f) **Evaluation**; g) **Others**.
- Ministries and/or Institutions, including Ministry of Finance and Capital Authority, is currently designing implementing regulations to regulate details on the business licenses, ease of doing business and/or procedures for investment incentives as mandated in GR 12/2023.





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Exhibition | Seminar | Business Matching | Trade Mission

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18 OCT - 18 DEC 2023  
(Online Exhibition)

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