



MINISTRY OF TOURISM AND CREATIVE ECONOMY
REPUBLIC OF INDONESIA

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Transforming and Capturing Indonesia's Economic Growth

Presented by:

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Ministry of Tourism and Creative Economy - Indonesia

Ankara - Turkey, 1 October 2014

myths & realities

MYTHS

1. Indonesian economy is relatively unstable
2. Economic growth centers almost exclusively on Metropolitan Cities
3. Indonesia follows the Asian Tigers' export-driven growth model
4. Resources are the economy's main drivers
5. Growth has come largely from an expanding workforce

REALITIES

- ▶ Indonesia's economy has the most consistent growth rate among any OECD or BRICS country over the past ten years
- ▶ Large and midsize cities are growing faster than Jakarta
- ▶ Non-commodity exports have a much lower share of GDP in Indonesia than Malaysia or Thailand
- ▶ The resources sector's share of the economy has fallen over the past decade
- ▶ Increasing productivity has been the main driver of GDP growth

Source: McKinsey Global Institute

Indonesia Today and in 2030



2013

2030

16th largest economy in the world

9th largest economy in the world

45 million members of the consuming class

135 million members of the consuming class

53% population in cities producing **74% of GDP**

71% population in cities producing **86% of GDP**

55 million skilled workers

113 million skilled workers needed

\$ 0.5 trillion market opportunity in consumer services, agriculture and fisheries, resources and education

\$ 1.8 trillion market opportunity in consumer services, agriculture and fisheries, resources and education

INDONESIA STATED AS “ONE OF THE FIVE MAJOR COUNTRIES IN ASIA WITH STABLE GROWTH MOMENTUM”

Table 1: Composite Leading Indicators**

	Ratio to trend, amplitude adjusted					Month on Month change					Year on Year change	Growth cycle outlook
	(long term average =100)					(%)					(%)	
	2013		2014			2013		2014			Latest month	
Nov	Dec	Jan	Feb	Mar	Nov	Dec	Jan	Feb	Mar			
OECD Area	100.6	100.6	100.6	100.6	100.6	0.05	0.02	0.00	0.00	0.01	0.65	stable growth momentum
Euro Area	100.7	100.9	101.0	101.1	101.2	0.17	0.15	0.13	0.10	0.08	1.85	positive change in momentum
Major Five Asia*	99.5	99.4	99.3	99.2	99.1	-0.06	-0.09	-0.11	-0.11	-0.07	-0.80	stable growth momentum
Major Seven	100.7	100.7	100.7	100.7	100.6	0.04	0.00	-0.03	-0.02	-0.01	0.66	stable growth momentum
Canada	99.9	99.9	99.9	99.8	99.8	0.01	-0.03	-0.05	-0.04	-0.03	0.34	stable growth momentum
France	100.2	100.3	100.3	100.4	100.4	0.12	0.09	0.06	0.03	0.02	1.25	stable growth momentum
Japan	101.1	101.1	101.1	101.1	101.0	0.09	0.04	-0.01	-0.05	-0.06	1.07	stable growth momentum
Germany	100.6	100.7	100.8	100.8	100.8	0.13	0.09	0.06	0.02	-0.01	1.32	stable growth momentum
Italy	100.8	100.9	101.1	101.3	101.5	0.16	0.15	0.17	0.18	0.19	2.47	positive change in momentum
United Kingdom	101.1	101.2	101.1	101.1	101.0	0.07	0.01	-0.03	-0.05	-0.04	1.06	stable growth momentum
United States	100.6	100.6	100.5	100.4	100.4	-0.03	-0.06	-0.08	-0.05	-0.01	0.11	stable growth momentum
Brazil	98.8	98.7	98.6	98.5	98.4	-0.07	-0.10	-0.12	-0.12	-0.10	-1.69	growth below trend
China	99.4	99.3	99.1	98.9	98.8	-0.09	-0.16	-0.19	-0.19	-0.11	-1.37	growth below trend
India	97.9	97.9	97.8	97.7	97.7	-0.10	-0.08	-0.07	-0.06	-0.05	-1.21	growth below trend
Russia	99.8	99.7	99.6	99.4	99.2	-0.03	-0.10	-0.17	-0.20	-0.20	-0.29	growth losing momentum

* China, India, Indonesia, Japan and Korea.

**CLI data for 33 OECD member countries and 6 OECD non-member economies are available at:

http://stats.oecd.org/wbos/default.aspx?datasetcode=MEL_CLI

NO	NATIONAL TOURISM STRATEGIC AREAS	PROVINCE	DISTRICT/ CITY	ATTRACTION TYPOLOGY/ AREA
1	Toba and vicinity	North Sumatera	Kab. Toba Samosir, Kab. Samosir, Kab. Simalungun, Kab. Tapanuli Utara, Kab. Karo, Kab. Humbang Hasundutan dan Kab. Dairi	Ecotourism, Geopark, Heritage
2	Muaro Jambi and vicinity	Jambi	Kab. Muaro Jambi	Heritage
3	Palembang Kota and vicinity	South Sumatera	Kota Palembang, Kab. Muara Enim, Kab. Banyuasin	Heritage
4	Kepulauan Seribu and vicinity	DKI Jakarta	Kab. Kep. Seribu	Marine
5	Kota Tua - Sunda Kelapa and vicinity	DKI Jakarta	West Jakarta - North Jakarta	Heritage
6	Borobudur and vicinity	Central Java	Kab. Magelang	Heritage
7	Bromo - Tengger - Semeru and vicinity	East Java	Kab. Malang, Kab. Probolinggo, Kab. Pasuruan, Kab. Lumajang	Ecotourism, Geopark, Heritage
8	Kintamani - Danau Batur and vicinity	Bali	Kab. Bangli	Geopark
9	Menjangan - Pemuteran and vicinity	Bali	Kab. Buleleng	Ecotourism
10	Kuta - Sanur - Nusa Dua	Bali	Kab. Badung, Kota Denpasar	Marine
11	Rinjani and vicinity	West Nusa Tenggara	Kab. East Lombok, Kab. Central Lombok, Kab. North Lombok	Ecotourism, Geopark
12	Komodo and vicinity	East Nusa Tenggara	Kab. West Manggarai	Ecotourism
13	Ende - Kelimutu and vicinity	East Nusa Tenggara	Kab. Ende	Ecotourism
14	Derawan - Sangalaki and vicinity	East Kalimantan	Kab. Berau	Marine
15	Sentarum and vicinity	West Kalimantan	Kab. Kapuas Hulu (Marine, Ecotourism
16	Tanjung Puting and vicinity	Central Kalimantan	Kab. Seruyan, Kab. West Kotawaringin	Ecotourism, Heritage
17	Toraja and vicinity	South Sulawesi	Kab. Tana Toraja, Kab North Toraja	Heritage
18	Bunaken and vicinity	North Sulawesi	Kota Manado, Kab. North Minahasa	Marine
19	Wakatobi and vicinity	Southeast Sulawesi	Kab. Wakatobi	Marine
20	Raja Ampat	West Papua	Kab. Raja Ampat	Ecotourism, Marine
21	Tanjung Kelayang	Bangka Belitung Islands	Kab. Belitung	Heritage, Marine
22	Weh and vicinity	Aceh	Kota Sabang	Ecotourism, Marine
23	Pangandaran and vicinity	West Java	Kab. Pangandaran, Kab. Ciamis	Ecotourism, Marine
24	Teluk Dalam - Nias and vicinity	North Sumatera	Kab. Nias Selatan, Kab. Nias	Heritage, Marine
25	Morotai	North Maluku	Kab. Pulau Morotai	Marine
		20 Provinces	45 Districts and cities	

INDONESIA'S GDP DEVELOPMENT, 2010 - 2030

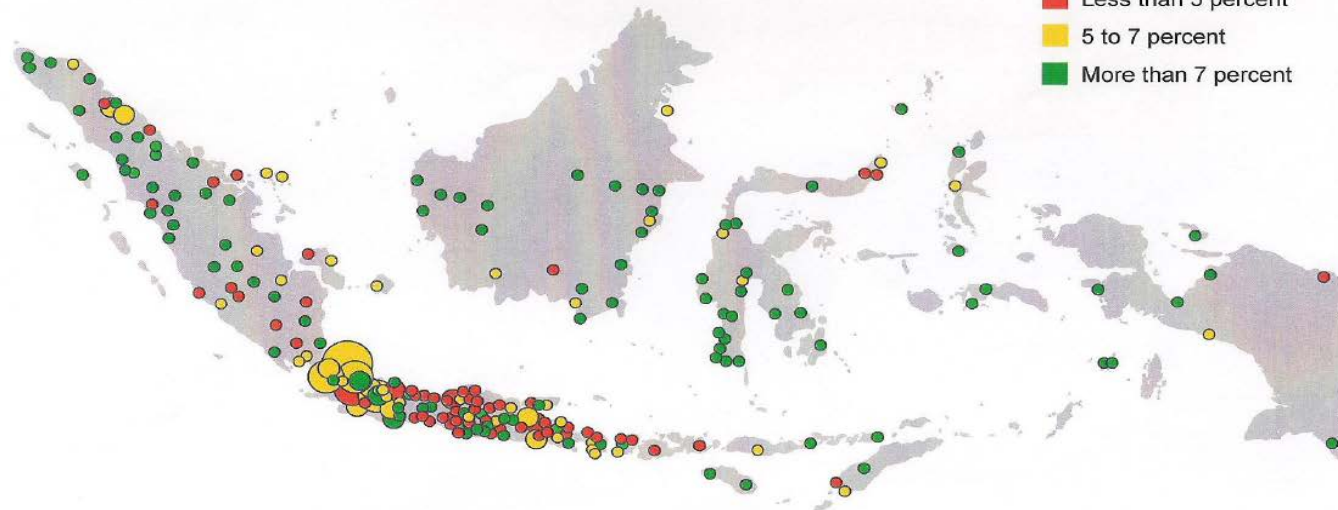
Some 90 percent of urban areas whose GDP is growing at more than 7 percent are outside Java
GDP development, 2010–30

Type of urban area¹

- Small middleweights (150,000–2 million)
- Mid-size middleweights (2 million–5 million)
- Large middleweights (5 million–10 million)
- Jakarta >10 million

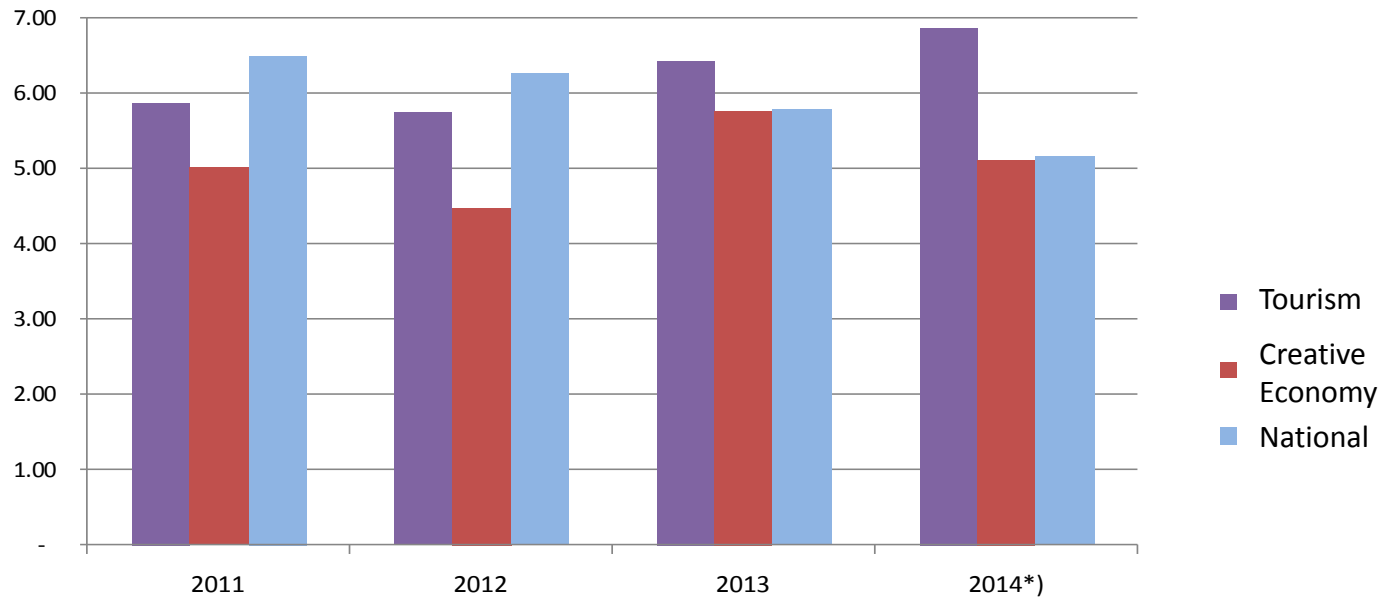
GDP compound annual growth rate, 2010–30 (%)

- Less than 5 percent
- 5 to 7 percent
- More than 7 percent



¹ Urban areas are aggregated areas consisting of cities (*kota*) and districts (*kapupaten*) rather than specific city jurisdictions,
SOURCE: 2010 Population Census, Indonesia's Central Bureau of Statistics; McKinsey Global Institute analysis

Tourism Growth Rate GDP, Creative Economy and National Year 2011-2014 (in %)



*) Semester I, 2014 Data

TOURISM PERFORMANCE IN NATIONAL ECONOMY BASED ON ECONOMIC INDICATORS IN THREE SECTORS (HOTEL, RESTAURANT, RECREATION & ENTERTAINMENT) Quarter I – II 2013 vs 2014

NO	URAIAN	T I-TII 2013**)	T I-TII 2014***)
1	ADHB (triliun Rp)		
	PDB NASIONAL	4,356.40	4,572.37
	PDB PARIWISATA	132.36	136.76
	Hotel	18.72	19.51
	Restoran	101.08	104.06
	Rekreasi & Hiburan	12.57	13.18
2	ADHK 2000 (triliun Rp)		
	PDB NASIONAL	1,360.46	1,430.79
	PDB PARIWISATA	46.19	49.36
	Hotel	10.33	11.24
	Restoran	29.89	31.59
	Rekreasi & Hiburan	5.97	6.53
3	Pertumbuhan Ekonomi y.o.y (%)		
	PDB NASIONAL	5.89	5.17
	PDB PARIWISATA	6.63	6.86
4	KONTRIBUSI PDB PARIWISATA		
	PDB PARIWISATA	3.04	2.99
	Hotel	0.43	0.43
	Restoran	2.32	2.28
	Rekreasi & Hiburan	0.29	0.29

Sumber : BPS (diolah kembali oleh Pusdatin)

Keterangan :

*) Angka sementara

***) Angka sangat sementara

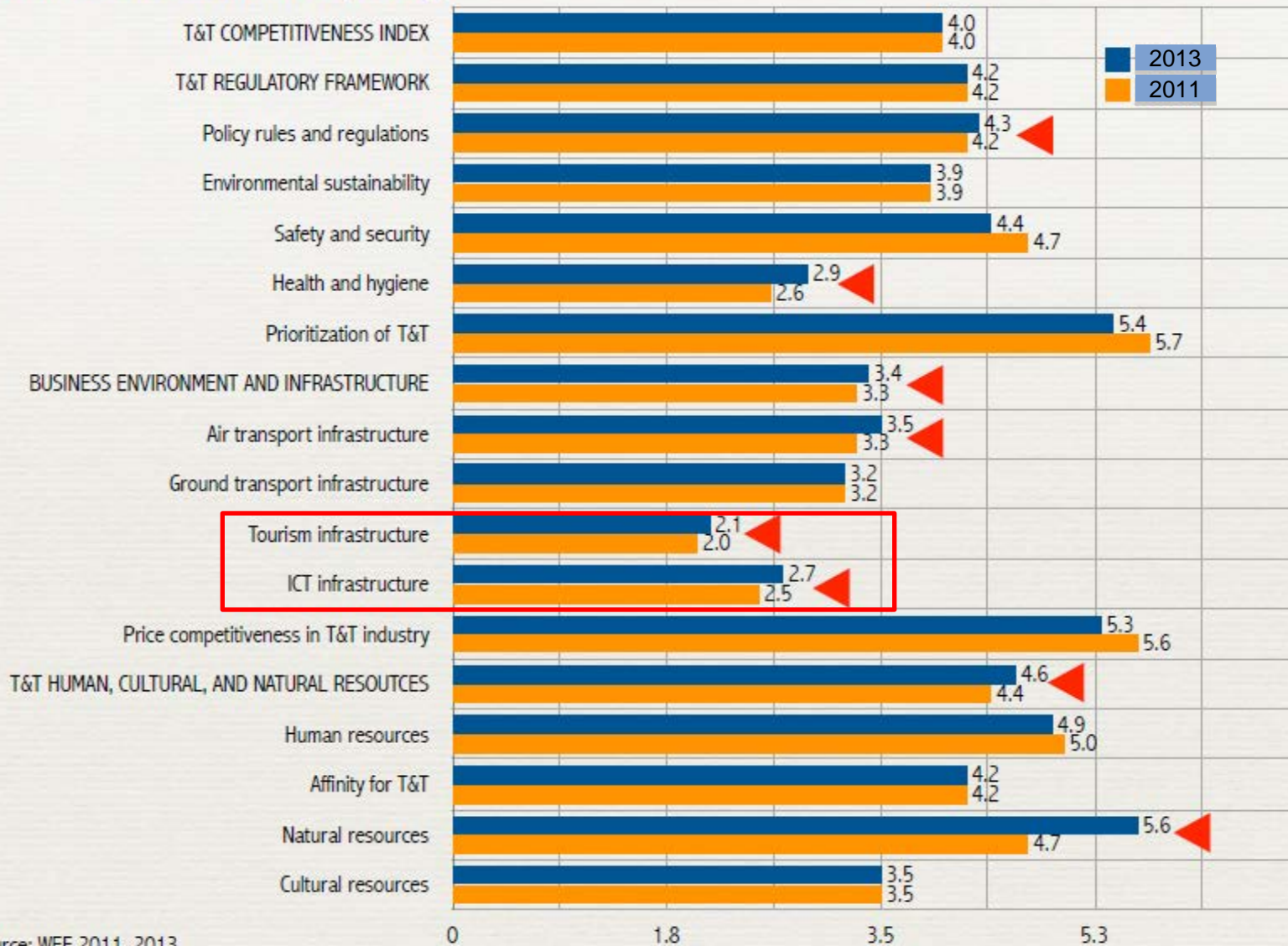
ADHK : Atas Dasar Harga Konstan

- **Tourism GDP** in 3 (three) sub-sectors (hotel, restaurant and entertainment services and recreation) based on Current Market Prices (ADHB) until II quarter of 2014***) has reached 136.76 trillion rupiah or an increase of 3,32% compared to the same period in 2013**) with the amount of 132.36 trillion rupiah.
- Tourism GDP **Growth rate** until II quarter of 2014***) has reached 6,86%. This number is above the national GDP growth rate in the same period of 2014***) with the amount of 5,17% and above tourism GDP growth rate in the same period of 2013**) with the amount of 6,63%
- Tourism GDP **contribution** in 3 (three) sub-sectors towards national GDP based on Current Market Prices (ADHB) until II quarter of 2014***) has reached 2,99%

Indonesia
Tourism and
Travel
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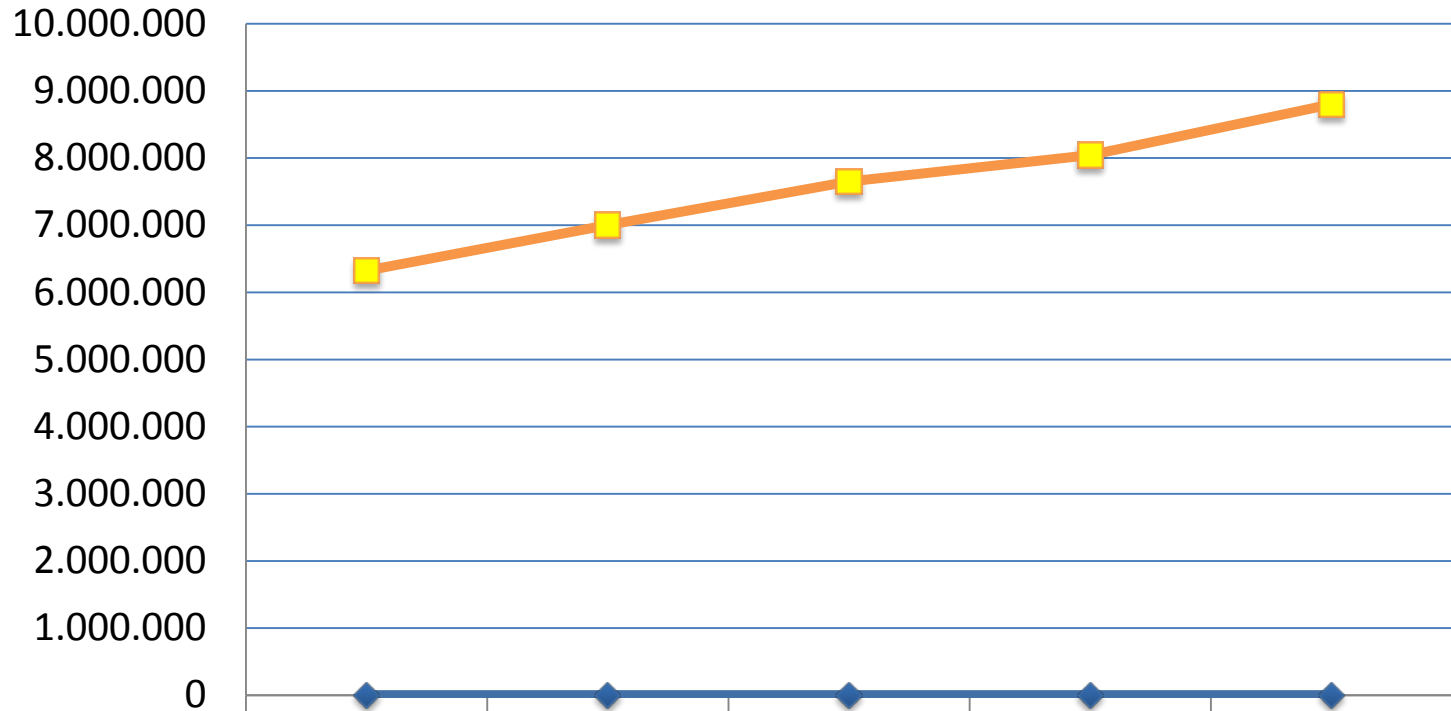
Improved from 74th rank (out of 139 countries) in 2011 to rank 70th (out of 140 countries) in 2013.

T&T COMPETITIVENESS INDEX (SCORE)



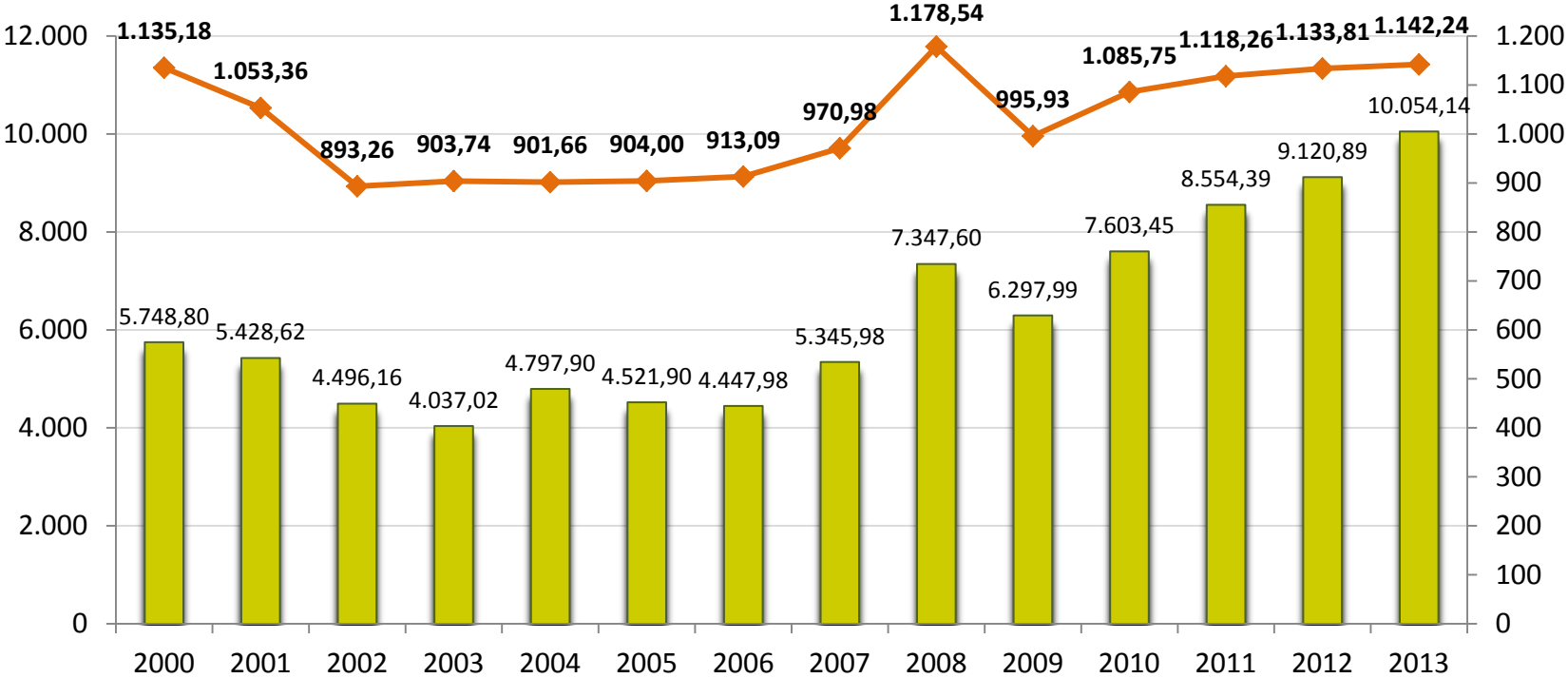
INTERNATIONAL VISITORS ARRIVALS

Period: 2009 -2013



	1	2	3	4	5
◆ YEAR	2009	2010	2011	2012	2013
■ Tourist Arrivals	6.323.730	7.002.922	7.649.731	8.044.462	8.802.129

AVERAGE EXPENDITURE AND FOREIGN EXCHANGE EARNING

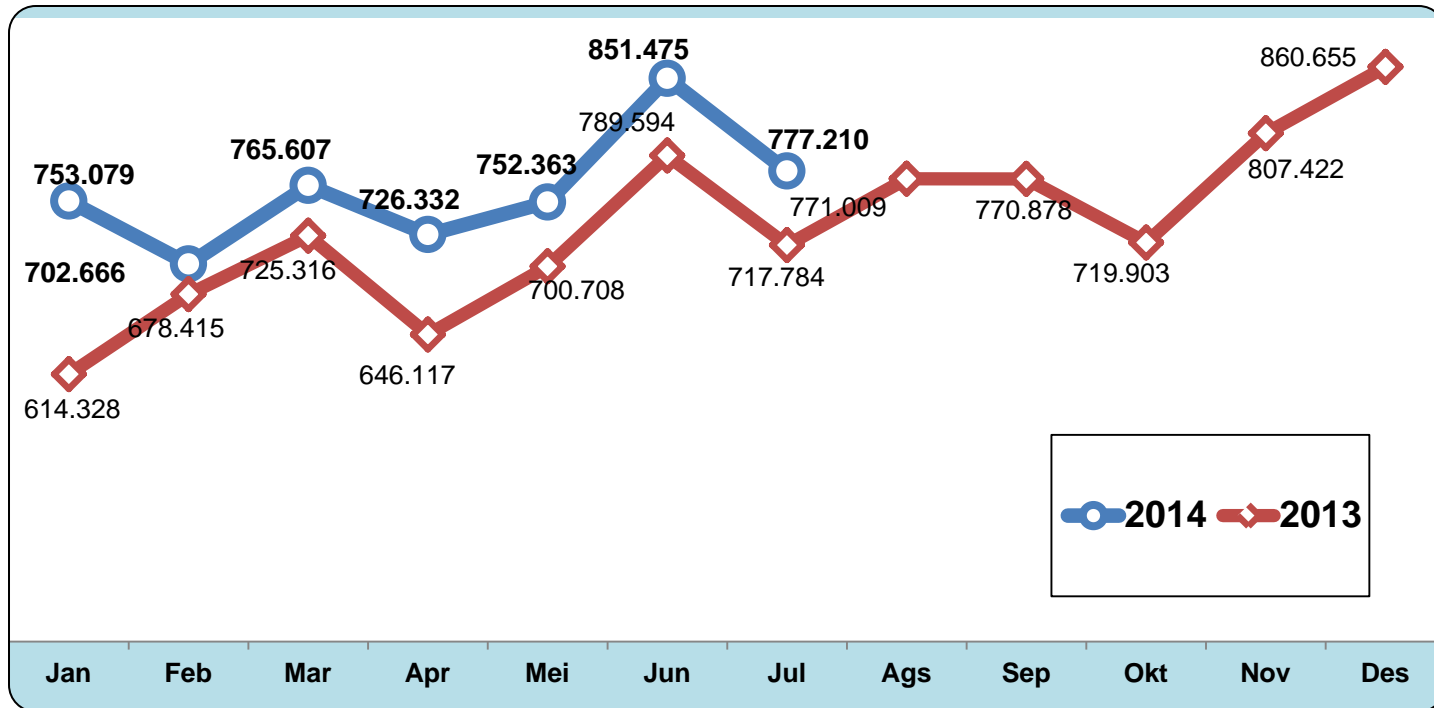


Source: PES, 2013

Foreign Exchange Earning

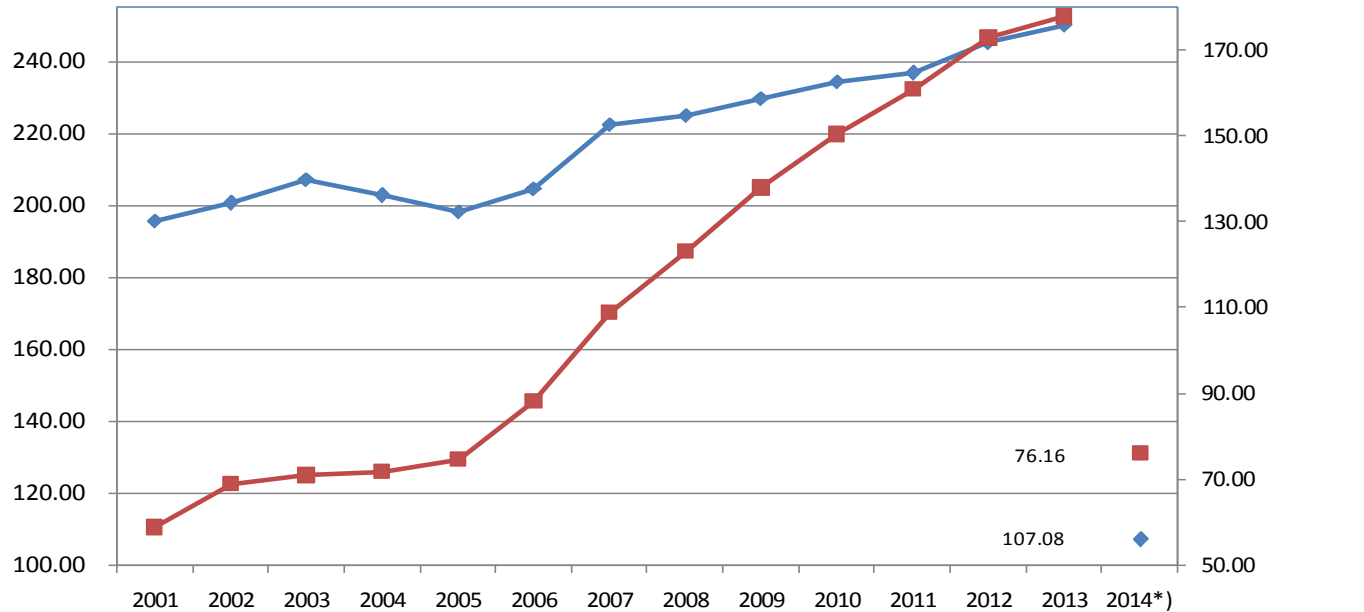
Tourist Expenditure Per Visit

INTERNATIONAL VISITORS MONTHLY VISIT 2014 vs 2013



- International visitors to Indonesia through entire entrances in July 2014 amounted to 777.210 international visitors or an increase of 8,28% compared to July 2013 with the amount of 717.784 international visitors
- Cumulatively, international visitors to Indonesia through entire entrances in January until July 2014 reached 5.328.732 international visitors or an increase of 9,37% compared to January until July 2013 with the amount of 4.872.262 international visitors

DOMESTIC TOURIST MOVEMENTS AND EXPENDITURES YEAR 2001 - 2014



Domestic tourist trips in the first semester in 2014 is estimated at **107.077.625** or **has 0,40% growth** compared to the same period in 2013 with the amount of **106.651.021**

- ◆ Trip (million)
- Total Expenditures (Trillion Rupiah)

INDONESIA INVESTMENT COMPETITIVENESS

Japan Bank for
International
Cooperation (2013)



#1 Investment
destination

Fitch Ratings (2013)



credit rating at **BBB-** level
with **stable** outlook.

Rating and
Investment
Information, Inc. (2013)



credit rating at **BBB-/stable** outlook.

Japan Credit Rating
Agency, Ltd. (2013)



foreign currency long-term senior debt at
BBB- with **stable** outlook.

S&P (2012)



sovereign credit rating at **BB+** level for
long-term

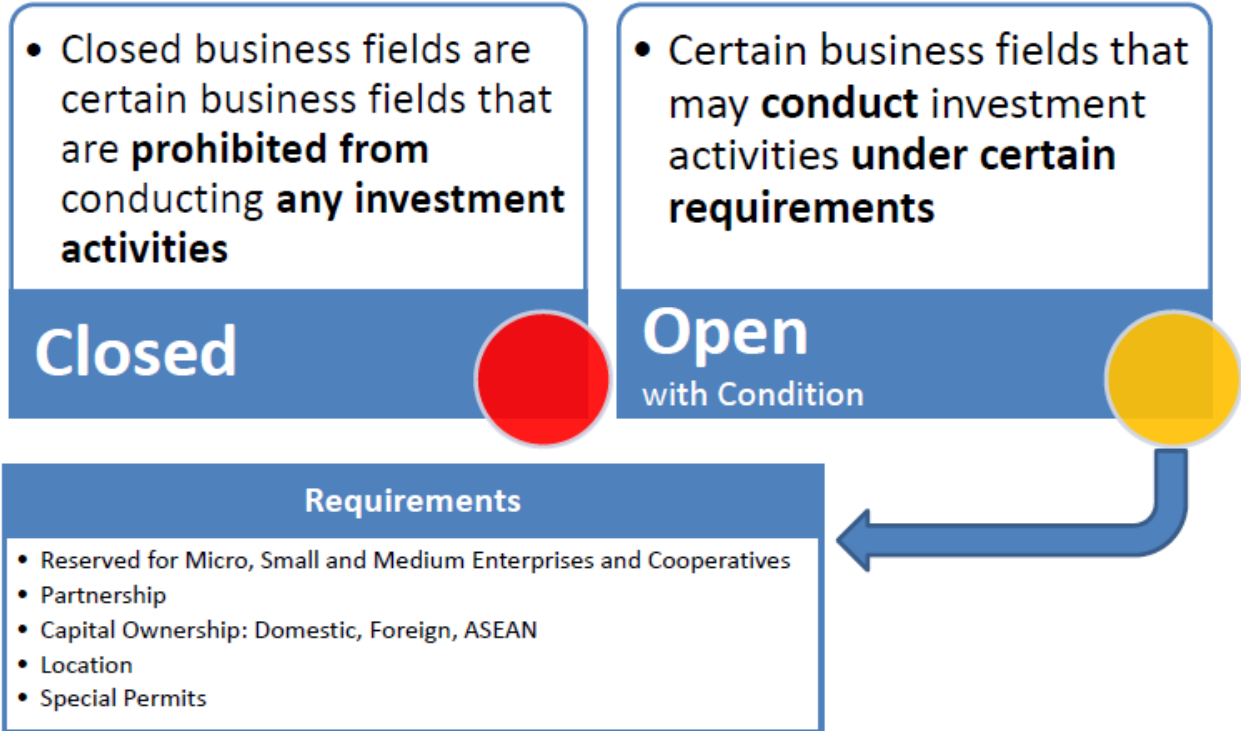
Moody's Investors
Service (2012)



foreign and local-currency bond ratings
Baa3 with **stable** outlook

PRESIDENTIAL REGULATION NUMBER 39 YEAR 2014 ON LIST OF BUSINESS FIELDS CLOSED TO INVESTMENT AND BUSINESS FIELDS OPEN, WITH CONDITION, TO INVESTMENT

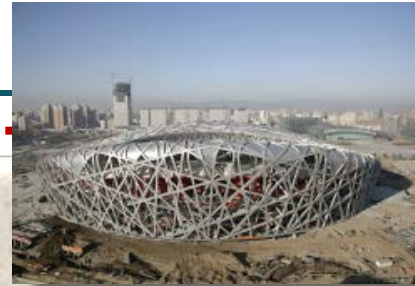
Provision on Business Fields *“Any business fields or types are **open** to investment activity, **except for those declared as being closed and open with certain conditions.**”* – Article 12 Paragraph (1) Investment Law Number 25 Year 2007



Tourism Investment Opportunity

1. 100 % of capital share can be owned by **foreign investor** for the following business:

- 3 to 5 Star Rated Classified Hotel;
- Tourism Resort,
- Golf Course & Driving Range,
- Convention & Exhibition Center,
- International Hotel Operator,
- Tourism Consultant (included Hotel Management)



Tourism Investment Opportunity

2. Foreign Equity Participation (51% share owned by foreign investor) for the following business

- a. 1 and 2 Star Hotel;
- b. Non Classified Hotel;
- c. Motel & Lodging Service;
- d. Home-stay;
- e. Catering;
- f. Spa;
- g. Amusement Center;
- h. Bar, Café, Singing Room (karaoke);
- i. Restaurant;
- j. Recreational Parks;
- k. Tour Operator;
- l. PCO (Professional Conference Organizer)
- m. Impresario;
- n. Tourism Attraction;
- o. Culture and Nature Tourism (except in conservation site).



Tourism Investment Realization (Hotel and Restaurant)

	1st Semester 2013 (in US\$ Million)	1st Semester 2014 (in US\$ Million)
FDI	96,910	243,035
DDI	22,330	12,956
Total	119,240	255,991

Tourism investment realization growth in the 1st semester of 2014 has grown up to **114.68%** compared to investment realization in the 1st semester of 2013

(in US\$ Juta)	Q1 2013	Q1 2014	Growth	Q2 2013	Q2 2014	Growth
FDI	31,170	117,240	276.13%	65,740	125,795	91,35%
DDI	5,340	12,888	141.35%	16,990	0,068	-99,60%
Total	36,510	130,128	256.42%	82,730	125,863	52,14%

DISCOVER INDONESIA TOURISM INVESTMENT OPPORTUNITIES

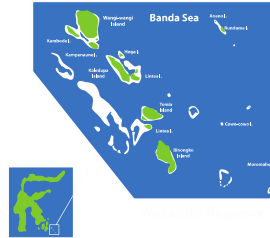
Small Islands	Bali Beyond	Sumatera Island	Eco Region	Sulawesi Island	Special Interest
<i>Wakatobi Regency (Southeast Sulawesi Province)</i>	<i>Mandalika Resort Lombok (West Nusa Tenggara Province)</i>	<i>Bono Tidal RiverBore (Riau Province)</i>	<i>Tanjung Ringgit (West Nusa Tenggara Province) & Eight Islands (NW Sumbawa)</i>	<i>Manado</i>	<i>Bugam Raya (Central of Kalimantan Province)</i>
<i>Anambas Archipelago (Riau Islands Province)</i>	<i>Mekaki Bay (West Nusa Tenggara Province)</i>	<i>Tobasa, Regency of Lake Toba (North Sumatra Province)</i>		<i>Bunaken</i>	
<i>Matakus Marine Tourism Triangle (Maluku Province)</i>	<i>Medana Bay Marina (West Nusa Tenggara Province)</i>	<i>Samosir, Regency of Lake Toba (North Sumatra Province)</i>			
<i>Belitung (Bangka Belitung Province)</i>					
<i>Sabang (Aceh Province)</i>					
<i>Bintan Island (Kepulauan Riau)</i>					

Small Islands Opportunities

Wakatobi Regency (South-east Sulawesi Province)

Total Area

3500 ha



Access

- Daily jetfoil services Baubau, mostly departing from Kendari and Makassar, with transit at Baubau. The only point of arrival by air is Matahora airport of Wangi wangi. Kendari and Makassar (Ujung Pandang) are both served from Jakarta and Bali.
- There are regular passengers ferry services between the main islands of Wakatobi.

Investment Opportunities

- Hotels and serviced accommodation
- Spas and managed residential estates
- Village based landed residential
- Retail, Restaurant, and Theme Leisure
- Entertainment facilities
- International airport
- Beachfront development sites
- Maleone village
- Extensive Marine Protection Area



Investment Opportunities

The regency administration has identified several beaches or islands prime for development. Individual beachfront parcels or islands may be acquired by private sector entities for eco – sensitive development of:

- Small boutique hotels, ranging from 3 to 5 star
- Boutique integrated spas and managed residential estates
- Stilt building at water edge or upon piers extended to deep water
- Water based tourism and sport facilities
- “Living History” ethnic village – boutique hotel and restaurants within traditional “Fishing Village” style houses and public gathering places
- Waterfront boardwalk with family leisure and entertainment facilities
- Waterfront conference / convention facilities





Investment Opportunities

- Expansion of existing village and related support services
- Fishing boat harbor and land-side facilities for processing and chilled storage of fresh fish, and facilities for seaweed drying and processing
- Major yacht marina and moorings, with full land-side facilities including various grades of accommodations, food and beverage outlets, local arts and crafts outlets, family sport and recreation club, as well as maintenance chandlery and fuel / water facilities
- High end hotel facilities in resort format with individual single and multi-room villas having their own pools, and variety of food and beverage outlets, business center, and extensive health / integrated spa facilities
- Main and subsidiary arrival jetties with associated facilities, to accommodate speedboats, traditional wood hulled ferries, float planes and helicopters

Belitung (Bangka Belitung Province)

Total Area

300 – 500 ha



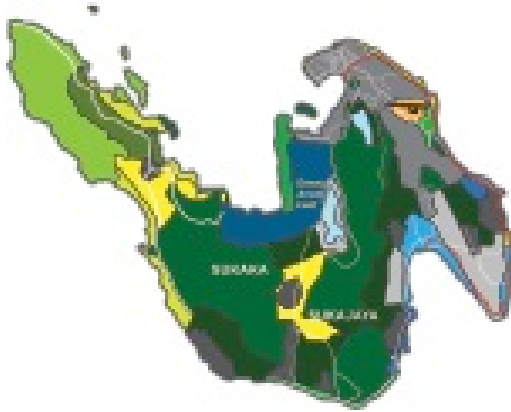
Access

- There are several daily flights from Soekarno Hatta Airport, Jakarta to Tanjung Pandan, Belitung. Flight takes 45 minutes
- 3-hour drive by public bus from Mentok to Pangkalpinang, the capital of Kepulauan Bangka Belitung
- There are ships heading to Bangka from Jakarta and Jetfoil from Palembang. It takes about 3 hours by jetfoil from Bom Baru Palembang to Tanjung Kalian in Mentok, West Bangka. The ships schedule from Tanjung Priok to Pangkalpinang or to Belinyu in Bangka as well as from Tanjung Priok to Tanjung Pandan or Tanjung Ru in Belitung are nevertheless irregular that you need to confirm beforehand with the port administrator

Sabang (Aceh Province)

Total Area

100 ha (5 different spots)



Access

- Sultan Iskandar Muda International Airport, also called Banda Aceh International Airport is the airport located 13,5 kilometers Southeast of the capital of Aceh Province, Banda Aceh.
- The most commonly used access from Banda Aceh to Sabang by sea and usually using sea transportation with facilities available, such as passenger ships (fast) and ship (slow). Passenger ships operate 2 times a day in the morning and evening, with departures that have been defined. Similarly, passenger ships, cargo ships also operate day-to-day but only once a day, at a rate that is not so expensive and provide comfort for passengers only once a day with travel time approximately 1 until 2 hour – drive

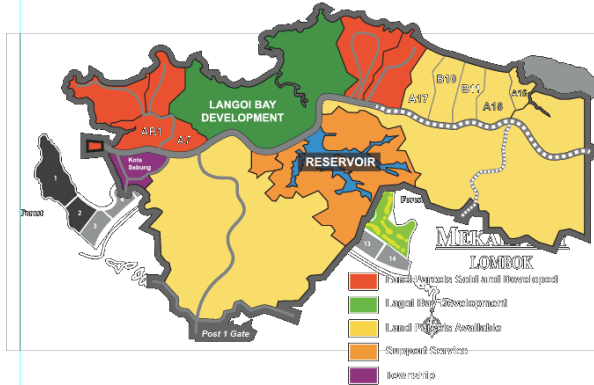
Investment Opportunities

- Port Service (Docking yard)
- Infrastructure for Port (Marina)
- Cruise Destination (Travel Agents)
- Green Power Plant
- Golf
- International Restaurant
- Hotel, Bungalow, and Resort
- Jungleland

Bintan Island (Kepulauan Riau Province)

Total Area

3500 ha



Investment Opportunities

- Prime beachfront resorts
- Idyllic resort homes
- Retail
- Spa
- F&B
- Golf Course
- Retirement village

Access

Airport: Private-tourist Airport 35 minutes by road from Lagoi Bay Suitable for 737 and A320 aircraft Mainly domestic and regional routes charters and private jets multiple daily flights from major Indonesian cities via Hang Nadim airport in Batam direct air services to Kijang airport in Bintan Sriwijaya – 2x daily from Jakarta Sky Aviation – 7x weekly from Pekanbaru Batavia Air – 7x weekly from Jakarta Lion Air – 5x weekly from Jakarta

By Road: 35 minutes by road from Lagoi Bay

By Sea: There are regular speedboat services plying Telaga Punggur Ferry Terminal, Batam and Bandar Bentan Telani Ferry Terminal, Bintan resorts. The journey takes approximately 45 minutes. Special chartered boat arrangements can also be made between Nongsa Ferry Terminal, Batam and Bandar bentan Telani Ferry Terminal, Bintan Resorts.



Bali and Beyond Opportunities

Mandalika Resort Lombok (West Nusa Tenggara Barat)

Total Area
1250 ha



Investment Opportunities

- Two 18 holes golf course and associated facilities
- Extensive land and sea sport / activities
- Upmarket hotels, condotels, serviced villa compounds
- Wellness centers and Medical centers
- Gated residential/ retirement communities
- Commercial & Retail center; Food & Beverages Outlets
- Convention facilities; performances venues
- Entertainment outlets; family amusement attractions
- Museum; arts & crafts galleries
- Surface infrastructure – roads
- Transportation facilities; port

Access

- Lombok International Airport
- 16 Km or 20minutes by car from Lombok International Airport
- By boat, there are a few that run from Bali via the Gili Isles, the boat trip (dependent upon boat type) can be as little as one hour from Bali to the Gili's, then approximately one and a half hours to the south of Mandalika Resort. Please check the internet for the latest available boat charters as these can change quite frequently. Slow ferry (approximately 5hours) is also available from Bali, arriving at the western port of Lembar with a transfer time of approximately 35minutes.



Mekaki Bay (West Nusa Tenggara Province)

Total Area

200 Ha



Access

- There is Lombok International Airport
- From Lombok International Airport can be access by road it only takes 1,5 – 2 hours to reach Mekaki Bay

Investment Opportunities

Developing tourism attraction such as; Theme park, Hotel, Resort, and Facilities in Biliton Island based on sustainability tourism development



Medana Bay (West Nusa Tenggara Province)

Total Area

7,4 ha (74.000 m²)



Investment Opportunities

- Develop a financial model with yield projections for: Mid-rise apartment block/hotel – possible to 10 levels high (about 40 m), hotel of 4 star quality (100 – 150 rooms) – management company, Parkland villas plan.
- Develop recreational & service facilities: main hotel swimming pool and junior pool, children's playground & safe shaded beachside area, tennis courts and badminton courts, shops and service outlets, hire cars, trekking guides, dive shops, health clinic – branch of SOS Medika International, spa and fitness well-being gym, jet ski hire, clubhouse and bar

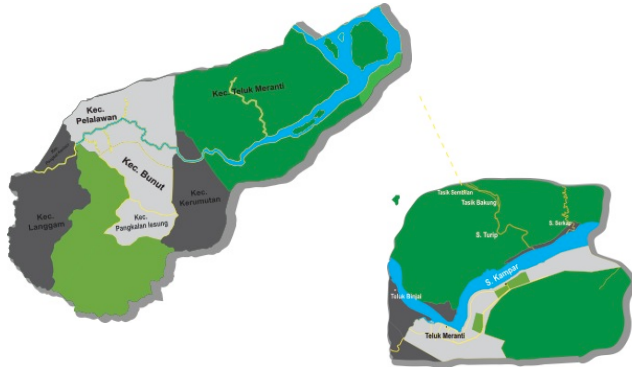
Access

- The airport for Lombok (LOP) is 25 minutes flying time from Bali (DPS), 50 minutes from Surabaya (SUB), and 1 hour 50 minutes from Jakarta (CKG). Silk Air flies directly to Lombok from Singapore in 3 hours. Lombok airport is 56 km by road from Medana, about a 90 – minute drive via the inland road over the hills
- Regular vehicles ferries run from Lembar to Padang Bai in Bali (4 hours) and from East Lombok across to West Sumbawa (1 hour) and the Newmont mine areas. Fast passenger boats run from Bali direct to nearby Gili Trawangan and the public jetty at Bangsal 6 km away. A dedicated fast boat to Medana from Bali provide dock to dock service with a two hour journey time



Sumatera Island Opportunities

Bono Tidal RiverBore (Riau Province)



Access

There is International Airport at Pekanbaru capital of Riau Province, receives international flights from Singapore and Kuala Lumpur, and domestic flights from Jakarta, Padang, Kuala Namu (Medan) and Batam plus other local airports.

From Pekanbaru, the drive to Pangkalan Kerinci, capital of Pelalawan Regency, is around 70 km and it is another 3 or 4 hours drive to the Bono River Tidal Bore site. There is potential for seaplane service from Batam some 150 km distant.

Investment Opportunities

The concept to develop this area refers to eco – sensitive development of:

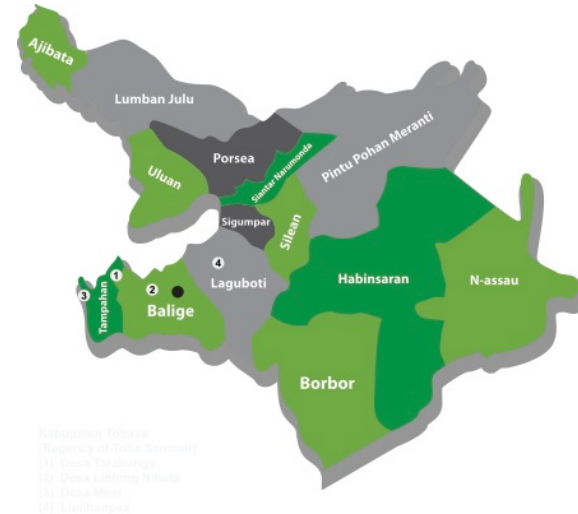
- Hotels of varying sizes, ranging from 3 to 5 star;
- High end spas and managed residential estates;
- Theme park (nature tourism / safari style);
- Extensive retirement focused housing. Active retired residents shall be encouraged to use their skill for community benefit;
- Water based tourism and sport facilities;
- “Living history” ethnic village – boutique hotel and restaurants within traditional Riau style houses and public gathering places;
- Riverfront boardwalk with family leisure and entertainment facilities;
- Riverfront conference / convention facilities;



Tobasa Regency (North Sumatra Province)

Access

- The closest airport is at Silangit airport, near Balige, a 40-minute flight from Kualanamu International Airport. Continued 2-hour drive to Parapat
- There is a ferry port that can be used to cross from Parapat to Samosir Island



Investment Opportunities

Developable land at various waterfront and inland locations have been zoned in the Regional District Plan for tourism. Individual parcels may be acquired by private sector entities for eco-sensitive development of:

- Hotels of varying sizes, ranging from 3 to 7 star;
- High end spas and managed residential estates;
- “Living History’ village – hotel and restaurant within traditional Batak style houses;
- Waterfront promenade with family leisure and entertainment facilities;
- Safari park with themed hotel village



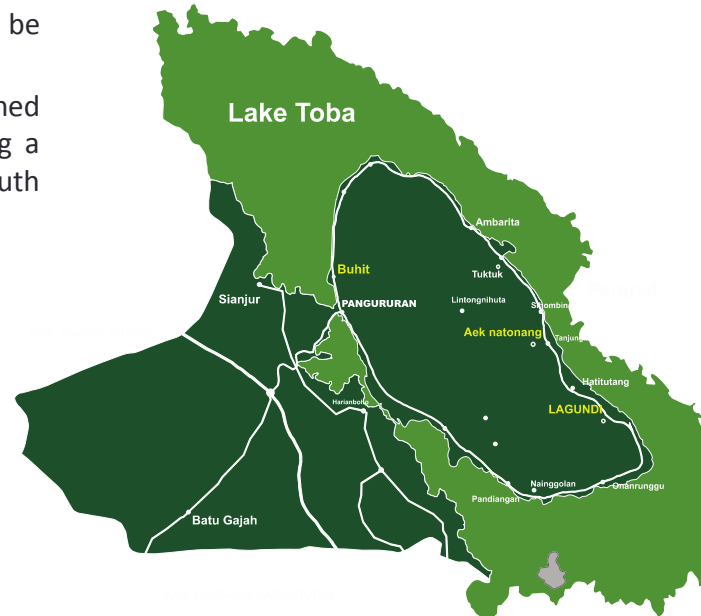
Samosir Regency (North Sumatra Province)

Access

- The closest airport is at Silangit Airport, near Balige. A 40-minute flight from Kualanamu International Airport continued 2-hour drive to Parapat
- There is a ferry port that can be used to cross from Parapat to Samosir Island

There are 3 areas of Samosir Regency will be developed, which are:

- 1) Aeknatonang Area, an elevated rolling site, zoned for tourism, some 94 hectares in size, including a charming lake of some 14 Ha, bound on the South by protected rain forest
- 2) Lagundi Area, development area of 28 Ha
- 3) Sigulatti Area





Investment Opportunities

1. Aek Natonang Area

An elevated, rolling site, zoned for tourism, 94 Ha. A lake 14 Ha, bound on the South by a protected rain forest. Individual parcels may be acquired by private sector entities for eco-sensitive development of:

Hotels of varying sizes, ranging from 3 to 5 star; High end spas and managed residential estate; Theme park (nature tourism / safari style); Extensive retirement focused on housing; Water based tourism facilities; “Living History” ethnic village – boutique hotel and restaurants within traditional Batak style houses and public gathering places; Lake-front conference / convention facilities; Support components may include lakefront boardwalk with family leisure and entertainment.

2. Lagundi Area

A development area of 28 Ha, ideally suited to sustainable residential hotel and camping products, supported by a traditional / ethnic village providing all necessary services and water sport facilities. Active retired residents will be encouraged to use their skills for community benefit

3. Sigullatti Area

A proposal for UNESCO recognition of the Regency cluster and protected forests around Lake Toba, plus the island of Samosir is under preparation. Investors are encouraged to enter public – private development agreements that will generate naming rights for the most spectacular geological formations to be included in the Geo – Park application

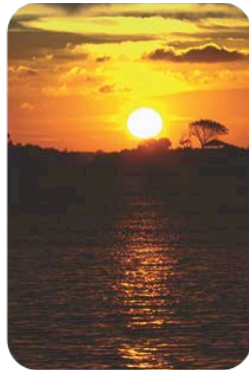
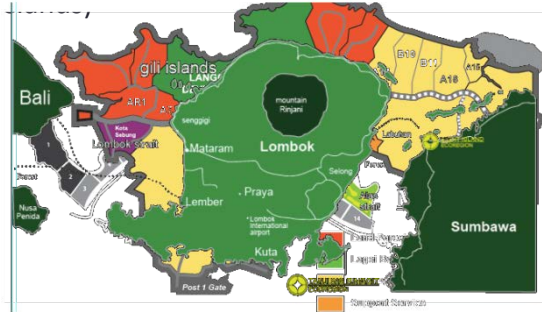
Eco Region Opportunities

Tanjung Ringgit (West Nusa Tenggara Province) & Eight Islands (NW Sumbawa)

Total Area

400 ha (Tanjung Ringgit)

20,000 ha (Eight



Access

Airport: Lombok International Airport

By road: 1,5 hours from the airport to Tanjung Ringgit

By sea: 20 minutes from Telongelong to Tanjung Ringgit and approximately 1 hour to Eight Islands



Investment Opportunities

- Prime beachfront eco-resort and hotels
- Sustainable eco-homes and villas
- Marinas
- Transportation facilities
- Renewable energy generation
- Dive centres and watersports
- Wellness centres and medical centre
- Commercial and retail centers
- Restaurants and bars

Special Interest Opportunities

Bugam Raya (Central of Kalimantan Province)

Total Area

105,5 square kilometers



Access

- Regular flights from international airport Soekarno Hatta - Jakarta to Iskandar Muda airport - Pangkalan Bun, 1,5hours.
- River ferries, inter-island ferries, freighters and passenger vessels are serviced by port facilities clustered on the river front at Kumai

Investment Opportunities

- Create a major transport interchange between Keraya and Sebuai (Zone KB1). Ensure variety of shuttle links between airport and seaport. Seaport should contain:
 - Inter-island ferry terminal
 - River ferry terminal
 - Cruise ship terminal
 - Super-yacht marina
 - Cruise yacht marina
- Associated with the port, create a high-end waterfront tourism focused district with restaurants, shops, leisure, and entertainment facilities, and all the services normally required by residents and visitor alike
- Eco-friendly development of leisure facilities such as golf courses, themed animal parks and a family oriented water park.
- Some 'floating' hotels in the area.



VISIT OUR WEBSITE TO UPDATE MORE OPPORTUNITIES ON INDONESIA TOURISM INVESTMENT

<http://www.indonesia-tourism-investment.com/>

The screenshot shows the homepage of the Indonesia Tourism Investment website. At the top, there is a purple navigation bar with the Indonesian Ministry of Tourism and Creative Economy logo, the 'wonderful indonesia' logo, and a 'Contact Us' link. The main banner features a scenic view of sailboats at a dock with the text 'Discover Indonesia Tourism Investment Opportunities' and 'Appreciation Of Natural Asset'. Below the banner is a row of seven category tiles: 'Welcome to Indonesia' (elephant), 'Invitation to Invest' (beach), 'Our Country' (temples), 'Our People' (market), 'Opportunities' (sailing), 'Development Philosophy' (person on boat), and 'Regional Investment' (outdoor seating). The bottom section includes a 'LINK' area with the ministry logo and a 'VIRTUAL TOUR' area with a sunset background.



MINISTRY OF TOURISM AND CREATIVE ECONOMY
REPUBLIC OF INDONESIA

www.indonesia.travel

TERIMA KASIH - THANK YOU



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