

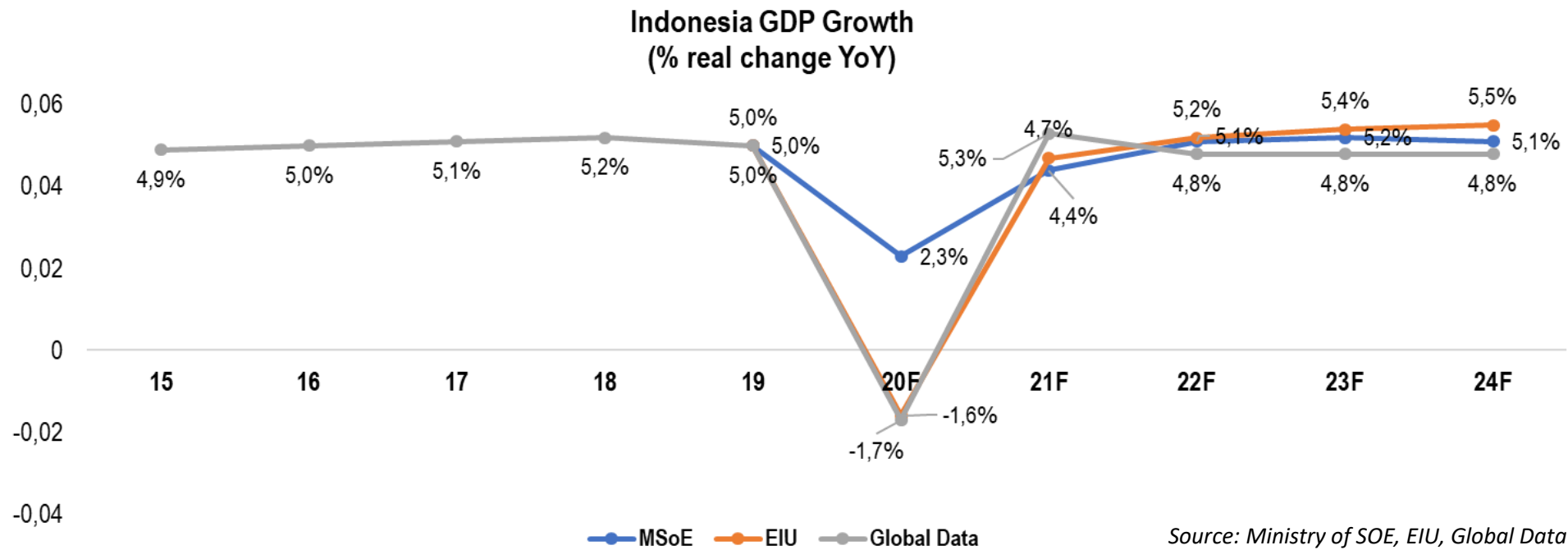
INDONESIA STRATEGIC DEVELOPMENT PLAN IN THE CONSTRUCTION SECTOR



Bimakarsa Wijaya

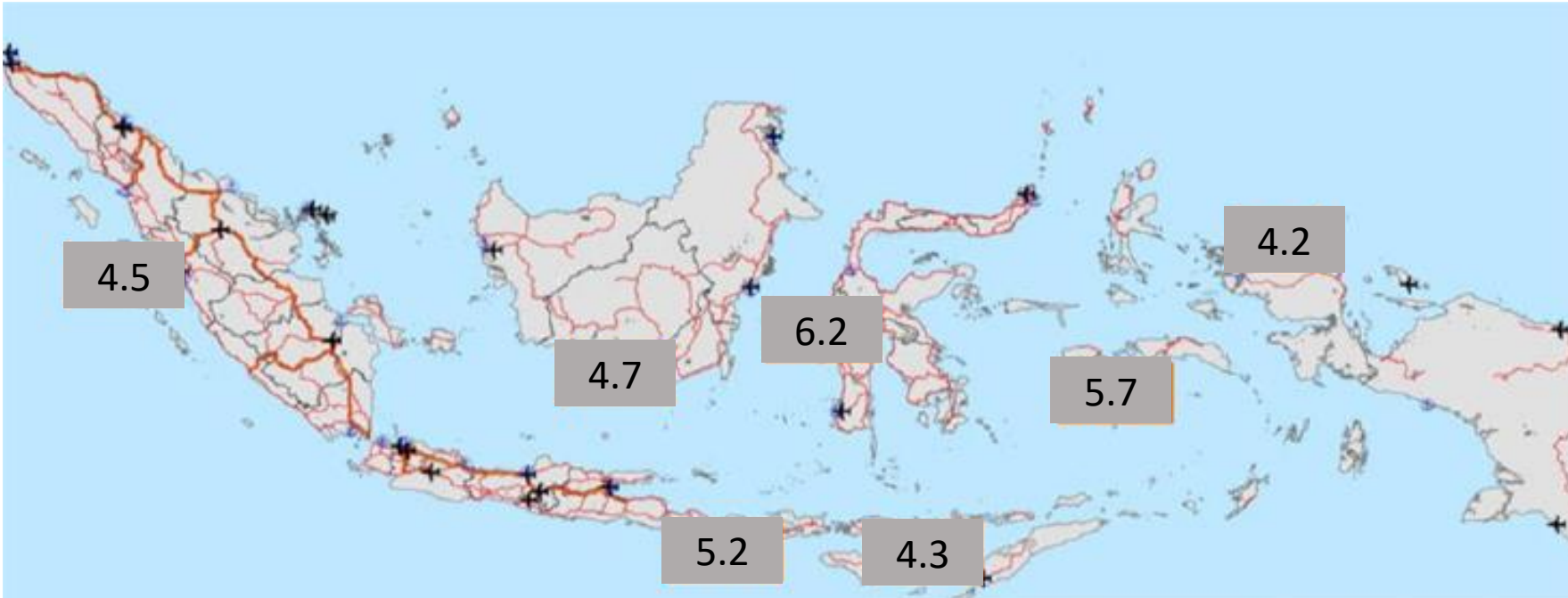
The Indonesian Iron & Steel Industry Association

INDONESIA GDP GROWTH: BEFORE & AFTER COVID-19



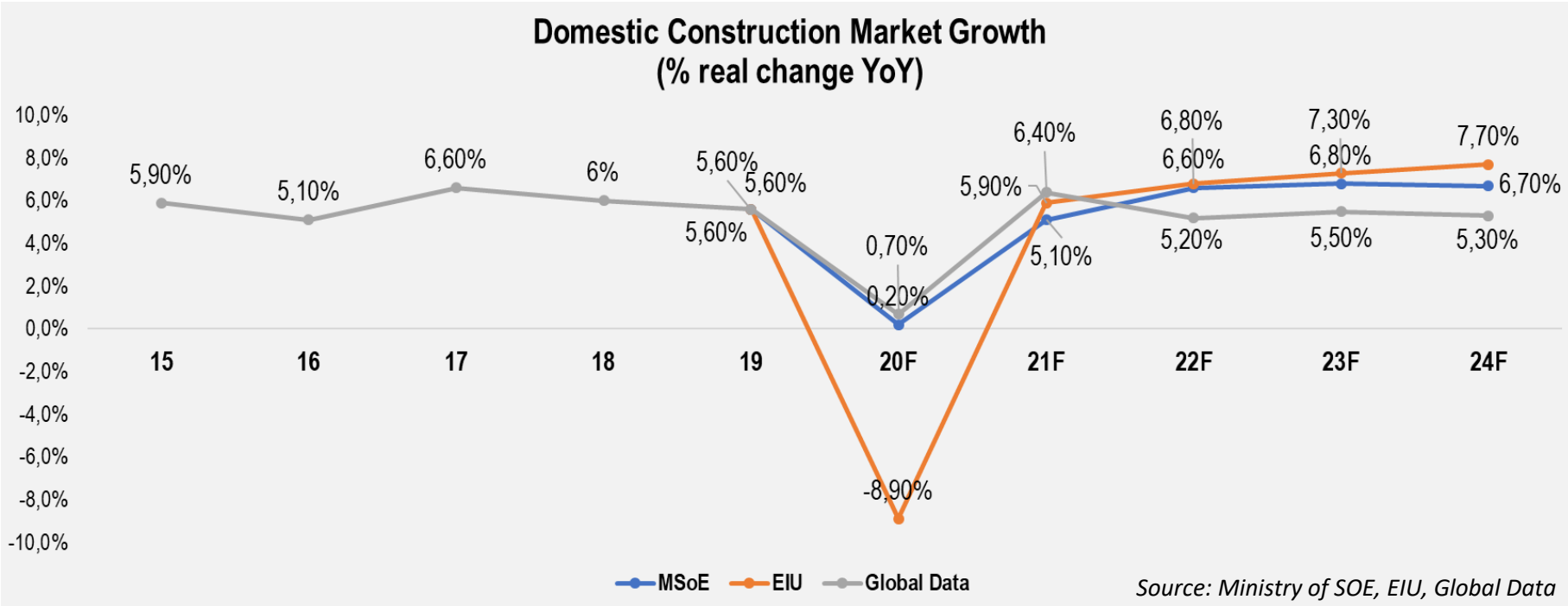
| | 2019 | H1 2020 | Target 2020 | | 2021 Mid-term Development Plan (revised) |
|---------------------|------------|-------------|-----------------|--------------------|--|
| | | | Before COVID-19 | After COVID-19 | |
| GDP growth | 5.0 | -1.3 | 5.3 | -0.4 to 1.0 | 4.5 to 5.5 |
| Consumption | 5.2 | -1.5 | 4.9 | -0.6 to 1.5 | 4.1 to 4.9 |
| Government spending | 3.2 | -2.4 | 4.3 | 3.2 to 3.7 | 2.5 to 3.5 |
| Investment | 4.4 | -3.5 | 6.0 | -2.8 to -0.5 | 6.0 to 7.1 |
| Export | -0.9 | -5.7 | 3.7 | -7.7 to -5.1 | 3.5 to 5.1 |
| Import | -7.7 | -9.6 | 3.2 | -12 to -8.6 | 4.4 to 5.9 |

INDONESIA GDP GROWTH BY REGION: BEFORE & AFTER COVID-19



| GDP Growth by Region | 2019 | H1 2020 | Target 2020 | | 2021 Mid-term Development Plan (revised) |
|----------------------|-------|---------|-----------------|----------------|--|
| | | | Before COVID-19 | After COVID-19 | |
| Sumatera | 4.6 | 0.1 | 4.8 | -0.3 to 1.3 | 3.9 to 5.1 |
| Jawa – Bali | 5.5 | -1.8 | 5.4 | -0.5 to 0.8 | 4.8 to 5.5 |
| Kalimantan | 5.0 | -1.0 | 6.4 | -0.4 to 1.8 | 3.6 to 5.7 |
| Sulawesi | 6.7 | 0.4 | 6.8 | -0.5 to 2.1 | 5.4 to 7.0 |
| Nusa Tenggara | 4.5 | 0.6 | 5.9 | 0.0 to 1.3 | 3.5 to 5.2 |
| Maluku | 5.8 | 1.5 | 6.1 | -0.3 to 1.5 | 5.2 to 6.2 |
| Papua | -10.7 | 2.9 | 6.0 | 0.0 to 1.6 | 2.6 to 5.8 |

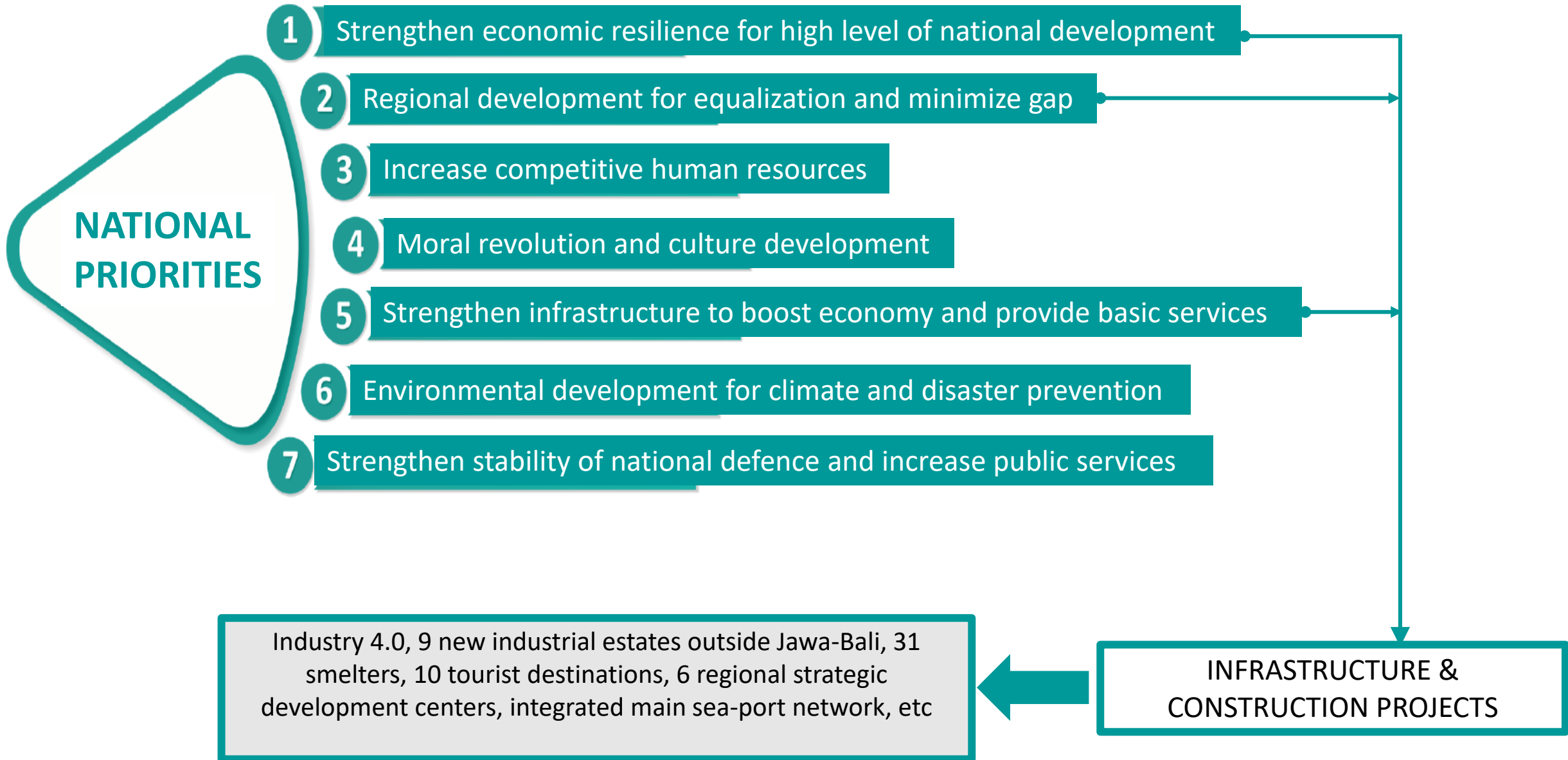
DOMESTIC CONSTRUCTION GROWTH: BEFORE & AFTER COVID-19 AND PROJECTIONS



| GDP by Sector | 2019 | H1 2020 | 2020 Plan | | 2021 Mid-term Development Plan (revised) |
|---------------------|------------|-------------|-----------------|--------------------|--|
| | | | Before COVID-19 | After COVID-19 | |
| Mining | 1.3 | -1.1 | 1.9 | -2.1 to -0.8 | 0.7 to 1.7 |
| Industry | 3.8 | -2.1 | 5.0 | -1.9 to 0.8 | 4.7 to 5.5 |
| Electricity & Gas | 4.0 | -0.8 | 4.2 | 1.6 to 2.6 | 4.8 to 5.8 |
| Water | 6.8 | 4.6 | 4.0 | 1.7 to 3.2 | 4.6 to 5.6 |
| Construction | 5.8 | -1.3 | 5.7 | -0.9 to 0.8 | 5.3 to 6.5 |
| Real Estate | 5.7 | 3.0 | 4.9 | -0.2 to 1.2 | 4.9 to 5.9 |

Source: Central Bureau of Statistic, National Development Planning Agency

2021 GOVERNMENT ACTION PLAN: SEVEN NATIONAL PRIORITIES



2021 CONSTRUCTION PROJECT: TOURISM DESTINATION DEVELOPMENT

Major Project of 10 Tourism Destination: Toba Lake, Borobudur, Lombok-Mandalika, Labuan Bajo, Manado-Likupang, Wakatobi, Raja Ampat, Bromo-Tengger-Semeru, Bangka Belitung, and Morotai

1. Integrated Tourism Master Plan: Labuan Bajo, Manado-Likupang, Bromo Tengger Semeru, Wakatobi
2. Infrastructure on Lake Toba, Borobudur, Lombok, Labuan Bajo, Manado-Likupang (75%)
3. Infrastructure on Bromo Tengger Semeru, Wakatobi, Bangka Belitung, Raja Ampat (25%)



1. Sibisa Airport
2. Railway to Adi Sumarmo Airport 13.5 km
3. Railway to Yogyakarta International Airport 5.7 km
4. Ferry Port to Ambarita, Balige, Muara, Poersea, Binongko, Tomia and Klademak
5. Seaport Likupang

1. By-Pass Road BIL-Mandalika 17.4 km
2. Access Road Borobudur Tourism Site 20 km
3. Access Road to Labuan Bajo Tourism Site 21.4 km

**IDR 161 trillion
(USD 11.38 billion)**

2021 INFRASTRUCTURE PROJECT: INDUSTRIAL ESTATES

Major Project of 9 National Priority Industrial Estates outside Jawa-Bali and 18 Developing Industrial Estates



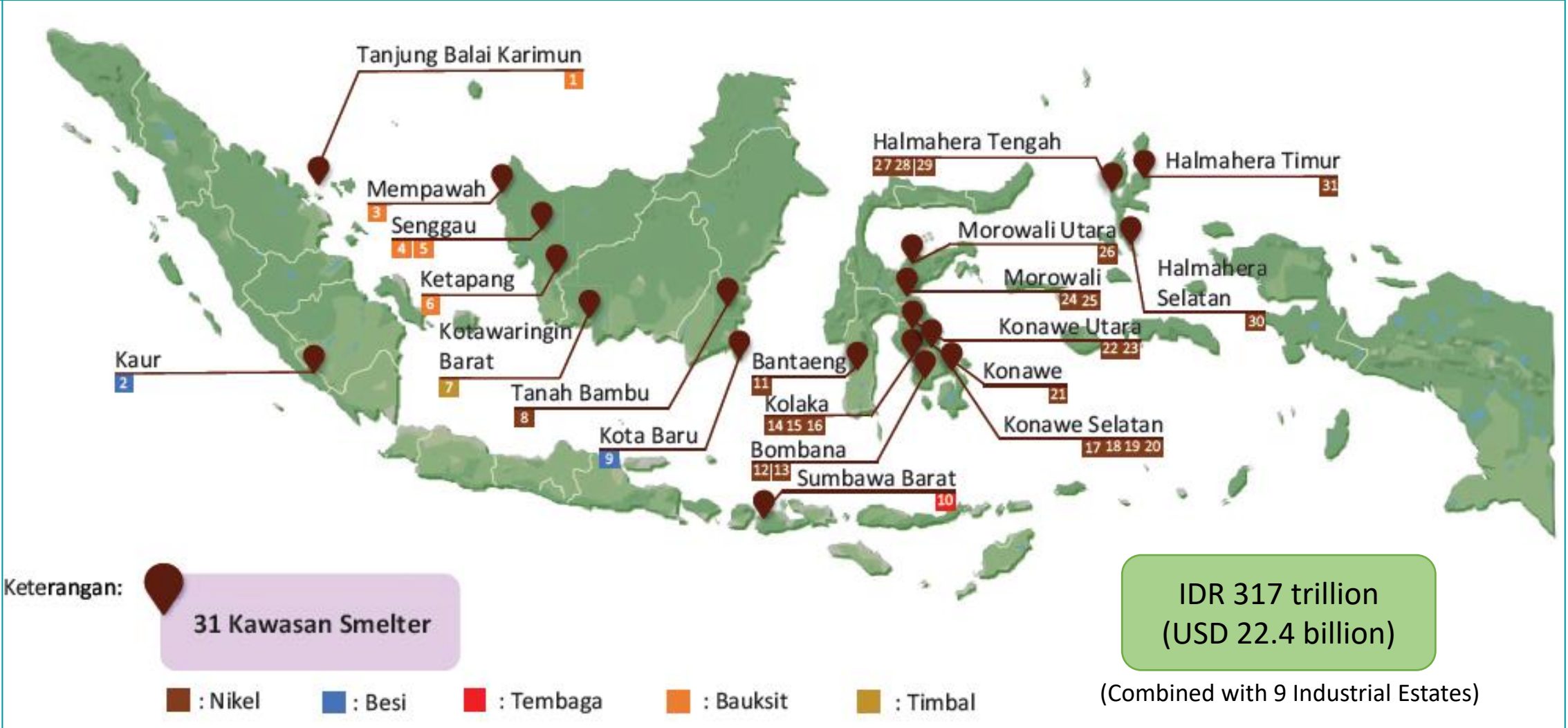
Keterangan:

- 9 Kawasan Industri Prioritas Nasional
- 18 Kawasan Industri yang Dikembangkan

*KI Palu difasilitasi Rehabilitasi dan Rekonstruksi Pasca Gempa
 **KI Teluk Bintuni difasilitasi dengan KPBU

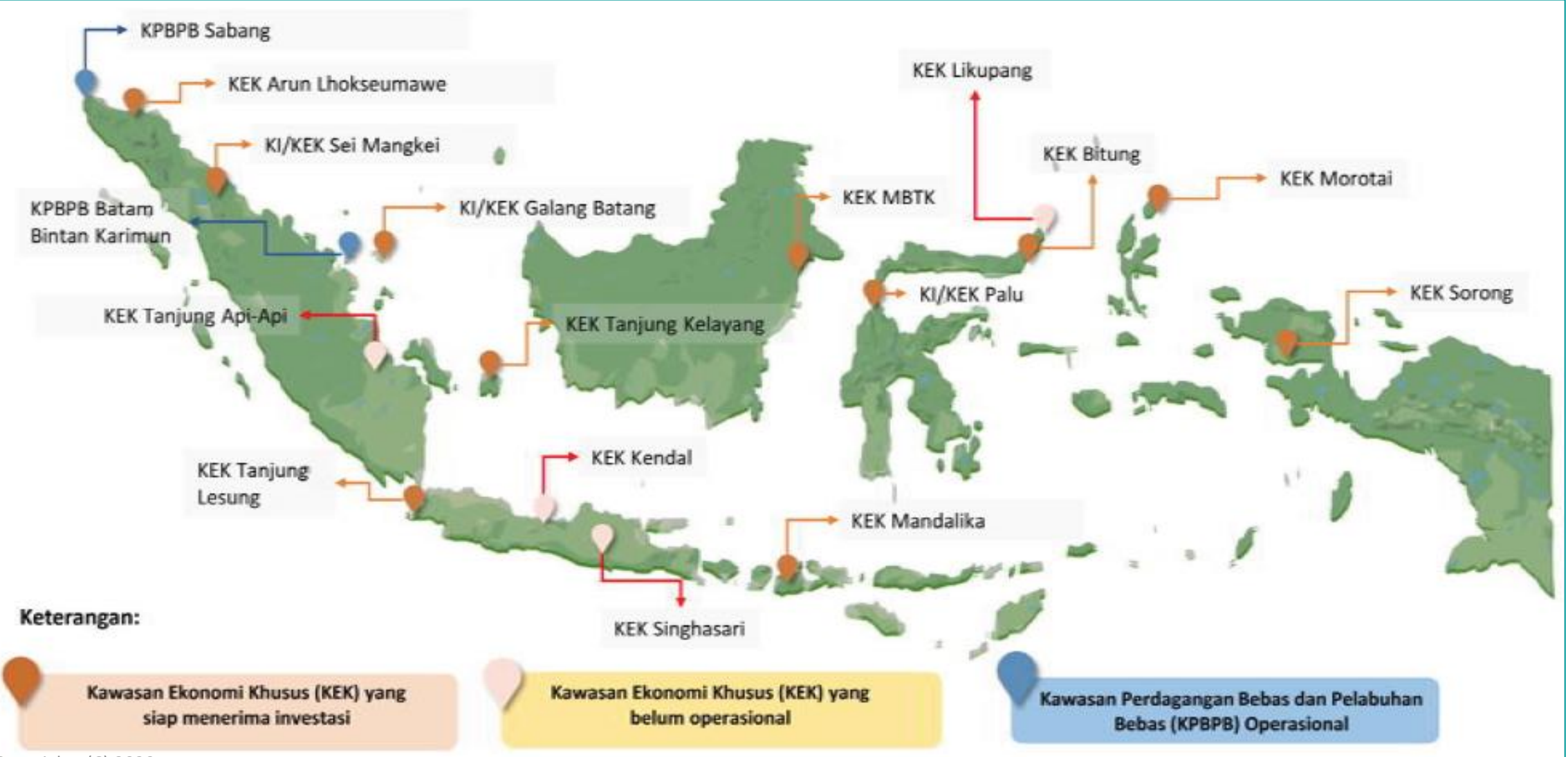
2021 CONSTRUCTION PROJECT: SMELTER

Major Project of 31 Smelter to Process Abundant Resources of Nickel Ore, Iron Ore, Copper, Bauxite and Galena



2021 INFRASTRUCTURE PROJECT: SEZ & FTZ

Major Project of 15 Special Economic Zone (SEZ) and Free Trade Zone (FTZ)



2021 CONSTRUCTION PROJECT: REGIONAL ECONOMIC DEVELOPMENT



2021 CONSTRUCTION PROJECT: REGIONAL ECONOMIC DEVELOPMENT



Source: National Development Planning Agency, 2020

2021 CONSTRUCTION PROJECT: REGIONAL ECONOMIC DEVELOPMENT

Arah Pengembangan Wilayah 2021 Wilayah Kalimantan

| | |
|--|---|
|  ICI/KEK/KPBPB |  Pusat Kegiatan Strategis Nasional |
|  Wilayah Metropolitan (WM) |  Kota Besar |
|  Kota Baru |  Kota Sedang |
|  Ibu Kota Negara | Koridor Pembangunan |
|  Sentra Kelautan dan Perikanan Terpadu (SKPT) |  Koridor Pertumbuhan |
| |  Koridor Pemerataan |



MAJOR PROJECT PRIORITAS RKP 2021


Pemulihan Industri, Pariwisata, dan Investasi

-  MP 1 Industri 4.0 di 5 Sub Sektor Prioritas
-  MP 3 9 Kawasan Industri di Luar Jawa dan 31 Smelter
-  MP 17 Pendidikan dan Pelatihan Vokasi untuk Industri 4.0
-  MP 22 Jaringan Pelabuhan Utama Terpadu

Reformasi Sistem Kesehatan Nasional

-  MP * Penguatan Sistem Kesehatan Nasional

Reformasi Sistem Jaring Pengaman Sosial

-  MP 18 Integrasi Bantuan Sosial menuju Skema Perlindungan Sosial Menyeluruh

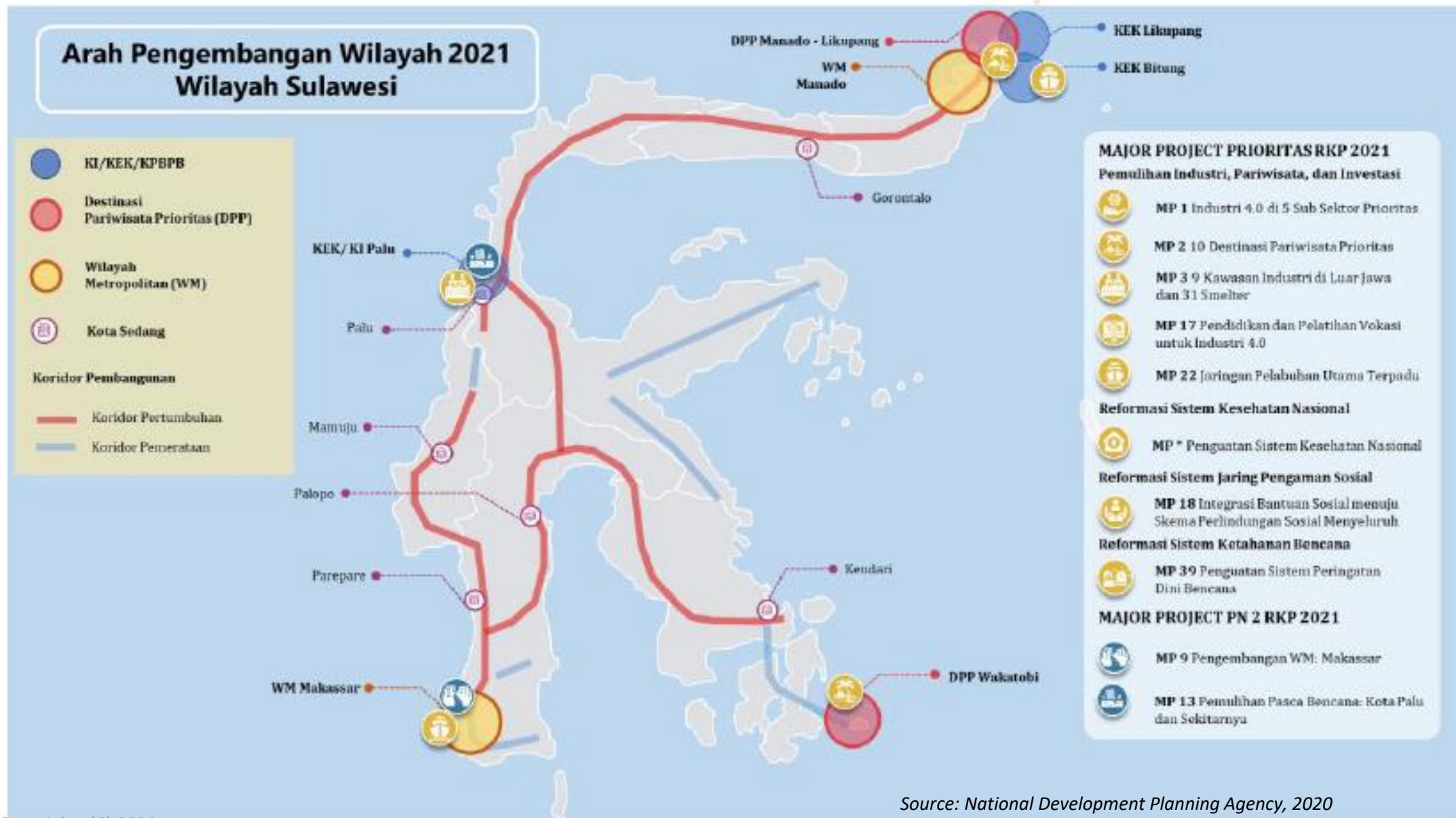
Reformasi Sistem Ketahanan Bencana

-  MP 39 Penguatan Sistem Peringatan Dini Bencana

MAJOR PROJECT PN 2 RKP 2021





-  MP 9 Pengembangan WM: Banjarmasin
-  MP 10 Pembangunan IKN
-  MP 11 Pembangunan Kota Baru: Tanjung Selor
-  MP 14 Pusat Kegiatan Strategis Nasional: PKSN Paloh Aruk, PKSN Nunukan

2021 CONSTRUCTION PROJECT: REGIONAL ECONOMIC DEVELOPMENT



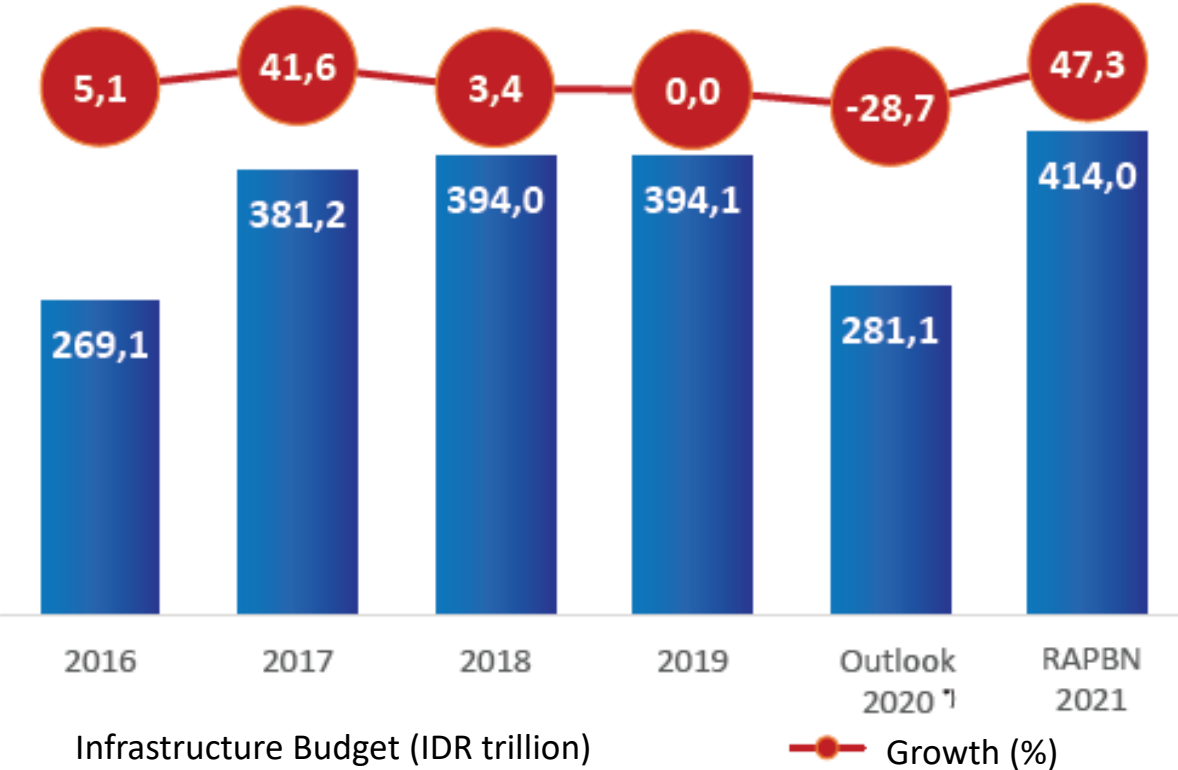
Source: National Development Planning Agency, 2020

2021 MINISTRY OF PUBLIC WORKS AND HOUSING GOALS: INFRASTRUCTURE FOR URBAN & BASIC SERVICES

| WATER RESOURCES | CONNECTIVITY | RESIDENTIAL AREA | HOUSING |
|---|--|--|---|
| Water supply 58.3 m ³ /capita/year | 2,500 Km Tollroad | 100% drinking water access 30% piping network | 51,340 Unit Apartment |
| 61 water dam | 3,000 Km New road | 90% sanitary 15% health safety | 10,000 Unit Special House |
| 500 unit water reservoir | 38,328 m Bridge | 10,000 Ha Take care for Slump Area | 813,660 Unit Selfmade House |
| 500,000 Ha water irrigation | 31,053 m Fly over/Underpass | 100% Urban Residential with good waste management | 262,345 Unit Housing Facilities |
| 2,000,000 Ha water irrigation network | | 5,555 Unit Development & Rehabilitation of Education, Sport & Market Facilities | |
| Water debit 50 m ³ /second | | | |
| 2,100 Km Flood control and Beach Protection | | | |
|  |  |  |  |

**IDR 150 trillion
(USD 10.57 billion)**

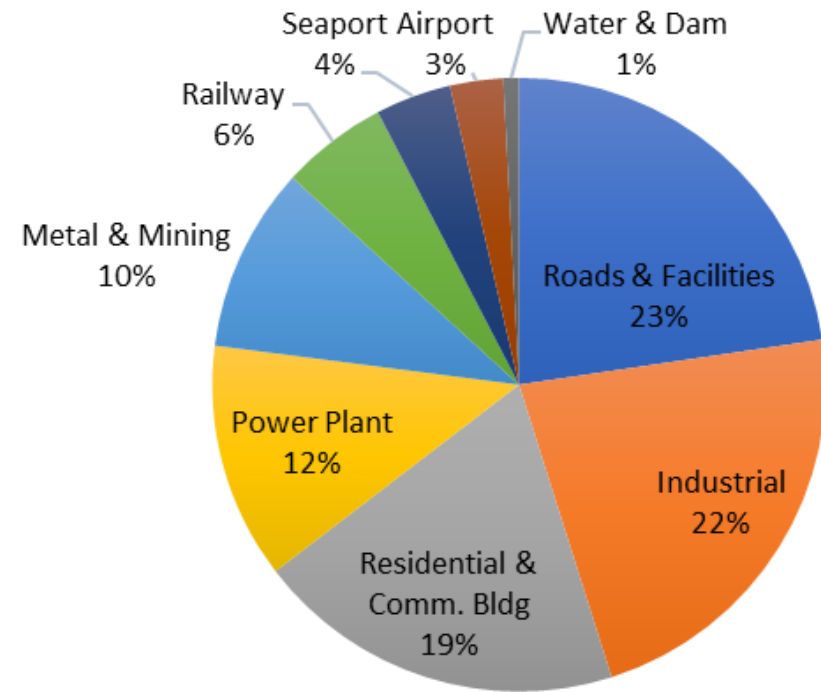
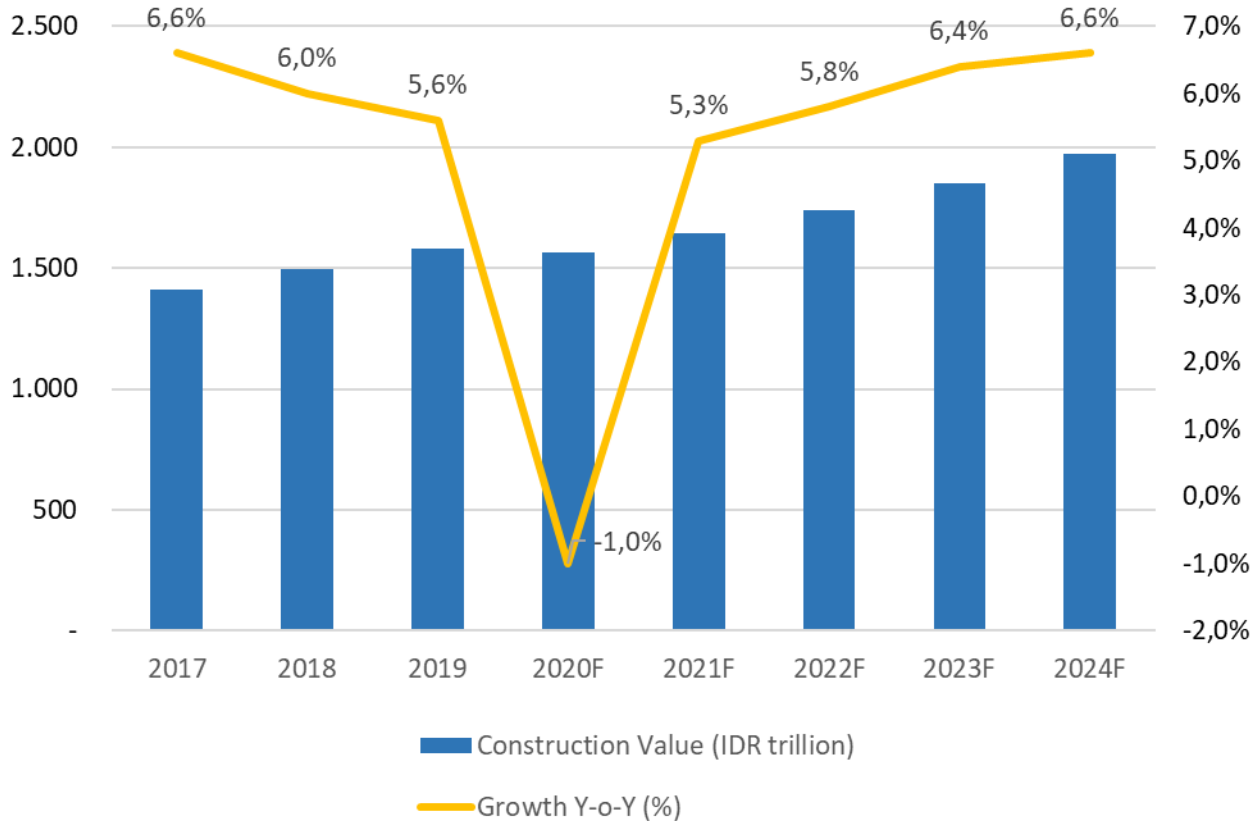
2021 INFRASTRUCTURE STATE BUDGET PLAN



IDR 414 trillion
(USD 29.2 billion)

Source: Ministry of Finance, 2020

ANALYSIS AND PROJECTION FOR CONSTRUCTION SECTOR 2020 - 2024



A new projection of construction sector growth has been made based on the National Mid-term Development Plan 2020-2024 (est. Jan. 2020) and the 2021 Government Action Plan which established recently (Sept. 2020). Basically Indonesian construction sector is expected to be back in business in the near future. Further analysis on the budget values shows the main construction segments are roads and industrial, followed by residential and power plant.

Terimakasih

