INDONESIA

FME CWM

Market Analysis Airport Sector

JULY 2012
This report is based on the information retrieved from a variety of different sources. All sources have been recorded and made available throughout the report. Although all efforts have been made to obtain the information from trustworthy sources, there can be no guarantee that the information is fully accurate.

This report has the objective to provide the reader with a wide range of information to obtain a view of Indonesia with the focus on the airport sector.

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In today’s ever growing and evolving economic context, airport management find ways for viable business solutions and models to diversify revenue streams and to keep abreast against stiff global competition. Moreover, the world is witnessing an intense transformation in the global economic landscape to currently facilitate immense flow of goods and people. Under this context, airport industry, being one of the main engines of economic growth, is at the frontline of globalization.

As an emerging economy, Indonesia acknowledges that airport development remains imminent. The demand has evenly surpassed the airport capacity given the statistical facts of international, regional and domestic movement of both travellers and air cargo. At present, the Indonesian government is undertaking measures to streamline and rejuvenate current airports whilst maintaining airports’ financial position as well as to create new ones in other regional corridors of Indonesia for the purpose of expanding airport capacity and spreading air freight and tourism traffic respectively.

Although the world is indeed getting smaller, there is a plenty of room to do business in Indonesia. As Ambassador of Indonesia, I am pleased to note of the trade mission from the Netherlands led by FME – CWM (Dutch Association of Enterprises) to explore business opportunities. Netherlands is globally known in delivering cutting edge technical know-how in air freight traffic and passenger flows, security and engineering as well as in maximizing resources under the Airport City concept. With vast market and potentials in the airport industry, Indonesia is a country to be seriously reckoned with for investment prospects.

I wish all the readers to enjoy this publication reflecting a window of immense opportunities where Indonesia in a strategic geographical location, is positioning herself to becoming a full pledged Gateway of Asia.

Retro L.P. Marsudi
Ambassador of the Republic of Indonesia
to the Kingdom of the Netherlands
Indonesia is currently experiencing high economic growth rates and becoming ever more important on a global scale. Key to maintaining economic sustainable growth is strategic infrastructure development. With over 17,000 islands in Indonesia the airport sector plays an essential role in the country’s infrastructure.

The airport sector in Indonesia is in terms of numbers and future prospects one of Asia’s most promising markets that is currently experiencing extraordinary growth rates.

This report prepared by FME will provide you with a detailed market analysis of the airport sector in the country. I hope this report will enhance your understanding of Indonesia and aid you in the process of doing business.

The Netherlands is a leading developer of airport and airport related business. Schiphol Airport is an international example of the airport city concept representing the capabilities of Dutch companies in this sector. The Dutch airport industry draws considerable attention with the implementation of remarkable projects worldwide, the design and construction of airports and related activities, as well as, the introduction of new products and services.

Dutch companies are known for their innovative achievements, great reliability, financial stability and their strong communication. Dutch suppliers deliver exceptionally innovative products of excellent quality. They are specialised in manufacturing custom-engineered products. In addition, they offer outstanding services in the field of design, engineering, installation, and maintenance. Because of these positive qualities, Dutch suppliers make an outstanding durable cooperation and lasting partnership possible.

Dutch enterprises are ready to share their innovative solutions and to explore opportunities with Indonesian business partners. Therefore, I am pleased to announce that FME, in collaboration with the Netherlands Airport Technologies and Dutch Avian Group, and with support from the Indonesian and Dutch Embassy, organizes a trade mission to Indonesia from 25-29 June 2012. I am confident that this mission will provide a stimulus to further strengthening our partnership.

As president of the Netherlands association of enterprises in the technological industry, I am therefore proud to present you this report and support the companies participating in the trade mission.

Ineke Dezentjé Hamming – Bluemi
President Association FME-CWM
Association FME-CWM is the Dutch association of enterprises in the technological sector. The organization represents 2,500 members in the metal, plastic, electronics and electrical engineering industries. These enterprises together employ a workforce of 225,000 in total. Joint annual turnover of member companies amounts to around 60 billion euro with a direct export totalling at 37 billion. We actively protect our members’ interests nationally and internationally, provide services to individual member companies and clusters of member companies, and support 120 trade associations.

FME wants to strengthen the position of technological industry in the Netherlands, internationally as well as nationally, by means of a vision, lobbying, advice and services designed to improve the competitiveness of its members, and by positioning the sector optimally and assuring its continuity.
The Netherlands Airport Technology group (N.A.T.) is located close to Amsterdam Schiphol Airport, in Zoetermeer, and is an association of reputable manufacturing and service providing companies in The Netherlands, supplying high-class products, equipment, systems and services to airports throughout the world.

By joining experience and resources, the members of the N.A.T. group offer a comprehensive range of products and services to be combined into fully integrated airport systems.

The N.A.T.’s success is a product of coordinating strength and close and efficient cooperation between its members in meeting clients’ needs.

As the voice of the Dutch Airport Industry the N.A.T. serves as a useful tool in the promotion of companies or individual members in the airport industry. In this site we present information on the products and services of the N.A.T. members that ensure the achievement of airport excellence.

www.nat.nl
Introduction

The airport sector in Indonesia is in terms of numbers and future prospects one of Asia’s most promising markets that is currently experiencing extraordinary growth rates. Yet many of the over 600 airports are lagging behind in terms of developments and are not able to cope with the fast rising demand of both passengers and cargo growth. This is resulting in several of the large national and international airports currently operating well above the normal capacity. The Soekarno-Hatta international airport in Jakarta, which is considered to be the main entrance for foreign travelers coming into Indonesia, is currently even operating at twice its actual capacity.

The majority of the airports are operated by local governments or through technical Executive Units under the Ministry of Transportation. There are many funds being allocated by the government and airport operators for the development of the airports. In addition, regulations for the involvement of private and foreign investors are being liberalized to speed up developments and attract additional funds.

Indonesia is a country that comes with its own manual. The country is very diverse in terms of culture and people. It is sometimes even said that the over 17,000 islands combined form one country, the Republic of Indonesia, but can be seen as multiple individual countries. Doing business in Indonesia requires basic knowledge of how to cope with the different situations you might encounter when doing business in this vibrant and remarkable country.

Although it is not considered to be the easiest market in terms of doing business, there is a large untapped potential offering opportunities for foreign companies.

This report will provide you with a general overview of the country and the airport sector that will enhance your understanding of Indonesia and aid you in the process of doing business.
Global developments have never taken place at such a fast pace as in the last decade. Never before has it been so easy to communicate, travel and do business with countries all over the world. With the world heavily struck by the financial crisis of 2008-2009, and its consequences that are still present in 2012, it was made clear how globalization is truly affecting countries all over the world.

Several Asian countries are experiencing economic growth rates well above average and have only seen a relative small slowdown due to the financial crisis. The fast increasing population in Asia and the international trade are contributing enormously to this growth. However, many countries in Asia are lagging behind in terms of developments that are not able to grow at an equal pace as the economy. This can especially be noticed in the infrastructural developments of a country.

Indonesia is one of these countries, with annual economic growth rates exceeding six per cent and with a population of over 240 million people. As an archipelago with over 17,000 islands, the infrastructure, and aviation in particular, plays a vital role in the movement of people and goods. Many airports are not equipped to handle this large increase in air traffic. This is causing problems for the airports and can affect the economic growth negatively due to inefficient handling of the passenger and cargo flow.

The Indonesian government is aware of this problem and is taking measurements to stimulate the developments in the country’s infrastructure. Development plans and programs are drawn up and types of ownership and investment constructions are simplified to increase the availability of funds and expertise.

This is leading to the development of several new airports in Indonesia and many investments for development and expansion in current airports to increase the capacity and make them compete on a global scale.

The Dutch are internationally known for their expertise in the field of technology and overall quality of products and services. This offers many opportunities to contribute to the already strong Dutch-Indonesian business relations. The Dutch entrepreneurial spirit and innovative ways reflect in the world-class Schiphol airport that sets an international example of how an airport can be fully exploited under the Airport City concept. The Indonesia airport sector is a market to take into serious consideration.
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Country Profile Indonesia
## 1.1 Country Overview

<table>
<thead>
<tr>
<th><strong>Official Name</strong></th>
<th>Republic of Indonesia</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Capital</strong></td>
<td>Jakarta</td>
</tr>
<tr>
<td><strong>Population</strong></td>
<td>248.2 million (2012)</td>
</tr>
<tr>
<td><strong>Middle Class</strong></td>
<td>+/- 50 million (2011)</td>
</tr>
<tr>
<td><strong>Main Distribution</strong></td>
<td>Java +/- 50% // Sumatra +/- 22% (2011)</td>
</tr>
<tr>
<td><strong>Surface Area</strong></td>
<td>1,905 (1000 km²)</td>
</tr>
<tr>
<td><strong>Islands</strong></td>
<td>over 17,000</td>
</tr>
<tr>
<td><strong>Main Languages</strong></td>
<td>Bahasa Indonesia, English, Dutch (+/- 580 local languages)</td>
</tr>
<tr>
<td><strong>Main Religions</strong></td>
<td>Muslim (86%) // Protestant (6%) // Roman Catholic (3%)</td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>Indonesian Rupiah (IDR) (+/- 11,800 IDR = 1 EUR) (June 2012)</td>
</tr>
</tbody>
</table>

### Economic

| **Nominal GDP**   | 1.121 trillion USD (2011) |
| **GDP Growth**    | 6.4% (2011)               |
| **GDP per capita**| 4,700 USD (2011)          |
| **Inflation rate**| 5.7% (2011)               |
| **External Debt** | 136.2 billion USD (2011)  |
| **Exports**       | 208.9 billion USD (2011)  |
| **Imports**       | 172.1 billion USD (2011)  |
| **Labour Force**  | 117 million (2011)        |
| **Unemployment rate** | 6.7% (2011)               |
| **Internet Users**| 30 million (2012)         |

### Interesting facts:

- Worlds fourth largest country in terms of population
- Seas and oceans compromise 81 per cent of the total area of the republic
- The largest predominant Islamic country in the world
- The population is expected to reach 315 million by 2035
- Badminton and soccer are the two most popular sports in Indonesia
- Indonesia means “Indus”, Latin for India, and “Nesos” Greek for islands

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KPGM Thinking Beyond Borders Indonesia 2011
Economist “Indonesia’s middle class” 2012
Rabobank Indonesia Country Report 2011
Want To Know It - Indonesia Facts 2012
Worldbank Country Profile 2012
Euromonitor Fact file 2012
National Geographic 2012
Indonesia Statistics 2012
CIA Factbook 2012

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Country Profile Indonesia | 1
1.2 Background

Indonesia is a diverse country with large regional differences in people and culture. From a historic point of view, foreign cultures and countries have had a large influence in this matter. For instance, the relation with India dates back for almost two millennia and contributed largely in the distribution of the Hinduism and Buddhism religion and related customs in Indonesia. In addition, the occupation by the Dutch and consecutively the Japanese also left a large footprint behind.

Currently Indonesia has a predominant Muslim religion, which originally was introduced by Arab Muslim traders several centuries back. The Islam has an increasingly larger influence within the country.

Indonesia is experiencing substantial economic growth the past few years with the government focusing on stimulating economic developments and to create a sustainable growth and an equal distribution of wealth within the country.

1.3 Geography

Indonesia is an archipelago existing out of more than 17,000 islands of which approximately 6,000 are inhabited. Located between the Indian Ocean and the Pacific Ocean the country compromises a Length of 5,200 km and a width of 1,870 km. There are three different time zones in Indonesia as can be seen in figure 1 below. The largest islands are respectively Sumatra, Java, Kalimantan (Borneo), Sulawesi (Celebes), and New Guinea.

Of these islands, Java is the most populous with over 130 million people, more than half of the total population of Indonesia.

With over 150 active volcanoes in Indonesia, it is commonly referred to be located in the “Ring of Fire”. This contributes to the fertility of agricultural land and the surrounding oceans but also brings many dangerous with it like volcanic eruptions and earthquakes that can have a disastrous impact.

Indonesia consist of 33 Provinces with 497 Regencies

Cities in Indonesia:

- 11 Metropolitan (>1 m Pop)
- 15 Large Cities (>500,000 – 1 m)
- 48 Medium Cities (>100,000 – 500,000)

Transportation development Indonesia 2011
Indonesia Masterplan Development 2011
Indonesian Embassy 2012
Wikipedia 2012
1.4 Culture

The Indonesian culture is very diverse with influences from many different countries and religions. With influences from Buddhism and Hinduism brought over from India, Islam from Arab countries and the colonization by the Dutch and Japanese it is difficult to define Indonesia to have one typical individual culture. Influences from western countries can also increasingly be seen in Indonesia due to the globalization. Shopping malls and other western concepts for instance, are becoming a more common sight, especially in the larger cities.

1.5 Economic Development and MP3IE

The economy of Indonesia is still largely driven by the exploitation of natural resources. To build a sustainable economy there should be more added value created in the business landscape through innovation and creativity. Besides this aspect, there are several other challenges that need to be overcome to create a balanced economy and realize sustainable growth.

The developing industrial areas are mainly located in the western part of Indonesia, creating an unequal division in wealth and overall developments. There are many regional differences in the infrastructure conditions that generally are not developing at an equal pace in relation to the economy. This is holding back the trade and putting a strain on further economic developments.

Indonesia has a large labour force of approximately 117 million. An obstacle in this matter is that a large percentage of the labour force is unskilled with only a small section having obtained a proper education.

There is a large shift in the population moving from rural areas to larger cities in search for better jobs. This urbanization leads to already 53 per cent of the population living in cities in 2010. This amount is expected to increase to 65 per cent by 2025. The cities will need to develop at least at an equal rate to provide balanced living conditions for all its citizens.

Facing these challenges requires decisiveness and consistency from the government to implement developments and investments in infrastructure and in the economy in general.

The Indonesian government still plays a significant role by owning several large Enterprises and influencing prices on commodities like fuel, rice and electricity. This offers the advantage that in certain cases reforms can be implemented efficiently by the government.
There is a wealth in natural resources available in the country that still compromise the main export commodities. This is a major contributor to the economic growth of the economy but with declining supplies and environmental protection regulations, it is important that the country is not solely depending on this to drive the economy.

Australia is a large contributor in stimulating the economic growth and developments in Indonesia. Relations between the two countries date back for over 100 years and are still very strong. Australia is providing much support in terms of fighting the country’s poverty and supporting economic developments. In addition, in the field of infrastructure the Australian government is supporting Indonesia through “the Indonesian Infrastructure Initiative” (IndII) that has the main objective for Australia to promote economic growth in Indonesia.

Indonesia currently ranks as 16th largest economy in the world and has the goal to reach the top ten world economies by the year 2025. To achieve this the government has issued a Masterplan that will guide Indonesia to achieve this goal.

The Masterplan for Acceleration and Expansion of Indonesia Economic Development 2011-2025 (MP3IE) is drawn up to drive the realization of high, balanced, fair and sustainable economic growth through the development of specific economic regions and other programs with the main objective of “placing Indonesia at the top ten advanced economies in the world by 2025”.

According to the MP3IE plan the government will spend 4,000 IDR trillion to develop the infrastructure accordingly.
2.1 Background

As an archipelago Indonesia is highly depending on ways of transportation by water and air to connect the over 17,000 different islands in its republic. With over 600 operational airports in Indonesia, traveling by air has always been a popular means of transportation in the country. Recent years the flourishing economy and the global developments in air travel has made air travel accessible to an increasingly greater number of people. This encourages the airport sector in Indonesia to become one of the largest in its region. However, this also means that many developments have to be implemented in this sector to keep up with the increasing demand.

The infrastructure in Indonesia is by far not developing at an equal pace in relation to the current economic growth and developments that the country is experiencing. This is putting a strain on the economic growth and developments. The government is recognizing this as a problem and have, in recent years, taken several measurements to stimulate the developments in the infrastructure and thus in the airport sector. The infrastructural sector has opened up more to private investments to ensure faster and better results. This is changing the climate at a fast pace with development plans being implemented for numerous modes of infrastructure. The airport sector as well is taking advantage of the much-needed results from this trend.

The air traffic numbers in cargo and passengers have experienced large growth rates the past decade. The economic growth in Indonesia is one of the main aspects contributing to this, supported by various aspects on the supply side; increase of regional attractiveness, improved connectivity and route development, and by aspects on the demand side; increased disposable income, increase in aviation, intensive industry and a higher propensity to fly. These factors have led and will lead to the fast ever-increasing demand for air traffic in Indonesia.
2.2 Market size

The high increase in air traffic can largely be related to the increase in common wealth of the Indonesians and the country becoming an evermore-popular destination for foreign tourists.

Indonesian airports handled a total of 66 million travellers and 870,000 ton of air cargo in 2011. Out of the 66 million passengers there were 58.8 million domestic travellers and 7.2 million international travellers in 2011. This is an increase of approximately 15 per cent in comparison to the preceding year.

Soekarno-Hatta, Juanda, Ngurah Rai and Polonia respectively are the four largest airports in Indonesia and combined accounted for almost 50 per cent of the total air cargo handled throughout 2011. Out of this 50 per cent approximately 35 per cent went via the largest International Airport, Soekarno-Hatta in Jakarta.

The ownership and management of the airports in Indonesia is divided amongst several operators. Out of the more than 600 airports in Indonesia, 233 are public state owned and operated airports out of which 29 are designed for international flights. Twenty-five of the larger airports out of those 233 are managed by two stated owned enterprises. Combined they are accountable for approximately 90 per cent of the total market revenue.

The majority of the other airports are owned and operated by local governments or through technical Executive Units under the Ministry of Transportation (e.g. the Directorate General of Civil Aviation).

The increase in air traffic numbers is not developing at an equal rate in comparison to the development of airports in Indonesia. As a result, many airports are operating well above its normal capacity and are not able to process the air traffic efficiently.

With the rise in air traffic, the revenue of the airport operators also increased at an exponential rate. The main source of revenue is still obtained by aeronautical means, which leaves a large space for development through other means of airport revenues.
In relation to most of the other countries in Asia, the Indonesian airport sector is still very much underdeveloped with a multitude of under-utilized small regional airports. A large investment potential is available to develop and improve airports and correlating facilities.

Soekarno-Hatta, international airport Jakarta, is by far the largest airport of Indonesia that in recent year (2011) handled over 51 million people, way above its operational capacity. This makes Soekarno-Hatta the 12th largest airport in the world by numbers of passenger handling in 2011.

**Market Growth**

To accommodate the increasing number of passengers, an estimated 17 per cent annual growth in the airport sector in Indonesia will need to be achieved.

The expected overall growth rate for air transport in Indonesia is between 6 and 10 per cent per year. This is mainly caused by the rapid growth of the economy and population. The strategic location in the heart of South-East Asia provides tremendous potential for further growth.

Other stimulus effects such as the ASEAN Open Skies Agreement have not even been taken into account in this forecast. When fully implemented this could add another 5 to 10 per cent to that growth rate.

With these prospects it is important that Indonesia will be able to cope with this growth and that the safety will not be neglected under the circumstances. With a total of 33 air traffic related accidents reported between 2005 and 2010 and a previous ban by the EU on Indonesian flights entering the European airspace due to a lack in compliance to safety standards, there are still much improvements to be made. With Indonesian airports already heavily burdened and the increasing growth in air traffic, investments and developments in airports and air traffic systems are of great importance to improve and sustain the safety of air traffic in Indonesia.
2.3 Developments

To meet the increasing demand in air travel in Indonesia the government has initiated several development plans aimed at the country’s infrastructure. They include the development to construct 14 new airports within the next five years and to expand and renovate 118 existing airports to increase the capacity and to develop the non-aeronautical activities of the airports. Private investors will be attracted to acquire the needed funds for the development plans and to increase the effectiveness and success rate of the plans. Regulations for the involvement of the private sector in infrastructure plans are still rather turbid. Therefore, several reforms in regulations have been implemented to moderate the private sector involvement. The reforms contribute to distinct ruling in regards to ownership, responsibilities, approaches and governmental support.

After completion of the current expansion and development plans in 2014 for the Soekarno-Hatta airport, it will be designed to accommodate 62 million passengers annually. This capacity will only be sufficient for the following decade since it is estimated that the demand will grow to 87 million passengers annually by 2025.

ASEAN Open Sky policy

"Open Skies in the ASEAN context is the liberalisation of air services between the 10 ASEAN member states. Through liberalisation of existing bilateral agreements between member states, existing restrictions on airline designation, market entry/access, frequency, capacity, schedules, products, code-sharing, tariffs, ownership and control are significantly relaxed for intra-ASEAN air services operated by airlines domiciled within the ASEAN member states."

The agreement will be fully implemented by 2015 for five Indonesian airports: Soekarno-Hatta, Juanda, Ngurah Rai, Sultan Hasanuddin and Polonia. Based on experiences from implementing the Open sky policy in other countries, several beneficial opportunities will originate from this. Open Skies will boost the air traffic growth and with it will come increased GDP and employment generation.

The primary routes that are expected to experience the direct consequences of the agreement is the Jakarta - Singapore and the Jakarta Kuala Lumpur that are both close to reaching its capacity limits.
In 2025 an additional 16.3 million international passengers, 99,159 aircraft movements and 291,000 tons of air cargo will be generated due to the implementation of ASEAN Open Skies. Jakarta will be the main beneficiary of the additional traffic followed by Bali Surabaya.

There are however certain potential risks involved for Indonesia. Indonesia has far more international airports than some other ASEAN countries that can create market, operational and logistic challenges for the already heavily burden Indonesian airports. The technologic developments of the Indonesian airports are also not on the same level as for instance that of Malaysia and Singapore creating a significant disadvantage. Additionally the increase in air traffic will have to be managed by the airports, that are currently already operating above capacity, and the Indonesian airlines strategies that have to contribute to the international trade and tourism links to Indonesia.
2.4 Structure of Airport Operators

Indonesia still has relatively many state owned enterprises in the infrastructural sector. As are the majority of the organizations that are managing and operating the airports.

Of the in total 233 public airports in Indonesia there are 164 operated by the Directorate General of Civil Aviation, a technical Executive Unit under the Ministry of Transport.

The 25 larger airports, with the majority of the international flight routes, are operated by two state owned enterprises namely PT Angkasa Pura 1 (AP 1) and PT Angkasa Pura 2 (AP 2).

Angkasa Pura 2 is responsible for the operations of twelve airports in the western regions of Indonesia and Angkasa Pura 1 responsible for the operations of the other thirteen airports, including two cargo warehousing and one air traffic control centre, in the eastern regions of Indonesia.

The responsibilities of the Angkasa Pura organizations oversee the complete management and exploitation of the airports and airport related services.

Angkasa Pura 1 has set up four different subsidiaries with complementary activities in regards to the management of airports. This will able the operator to provide a wider range of non-aeronautical services to its passengers that will contribute to the annual revenue. The additional activities are divided amongst the exploitation of hotels, logistic services, ground support in terms of development support and property.

Interesting Facts:

△ Angkasa Pura means "Sky City" in Sanskrit
As of January 2013, a new scheme will be implemented in which AP 1 & II will no longer receive state budget funds and will be financed by the State-Owned enterprises themselves. Under the MP3IE scheme, capital is allocated by AP 1 with IDR 3.05 trillion and AP 2 with IDR 1.63 trillion to finance the current planned developments.

Some smaller airports are owned or operated separately, either directly by provincial governments, or through technical executive units under the Ministry of Transportation.

The largest airports in terms of air traffic are respectively; Soekarno-Hatta (Jakarta), Ngurah (Bali), Juanda (East Java), Polonia (North Sumatra), Hasanuddin (South Sulawesi).
The DGCA Indonesia is the department under the Ministry of Transportation that has the responsibility for many airport related operations and activities. This includes the fields of air transportation, airports, air traffic control, flight security, air navigation, aircraft airworthiness and operation. The DGCA is actively involved in developing the airport sector in Indonesia to become increasingly better in terms of operations, safety, quality and overall efficiency. Within DGCA, the Directorate of Air Navigation is responsible for policy, regulation and provision of air navigation services (ANS), aeronautical information, communications, navigation and surveillance (CNS) as well as standardization and certification.

The DGCA has six Sub Divisions that are responsible to formulate, develop and implement policies, standards, norms, guidelines, criteria, systems and procedures, supervision, control and evaluation and reporting in their respective fields:

- Secretariat of the Directorate General of Civil Aviation
- Directorate of Air Transport
- Directorate of Airport
- Directorate of Aviation Security
- Directorate of Air Navigation
- Directorate of Airworthiness and Aircraft Operation

**Merger in Air Traffic Control**

An important development is the merger of the current five providers for air navigation services in Indonesia. Since there are several providers active in this field, current operations are running inefficient and can cause problems in navigation amongst providers. The out-dated technology that is still being used is also adding up to the problems in this field. With the merger of the five providers that will that will go by the name of Public Enterprise (Perum) for Flight Navigation Services (PPNPI) an important step is taken to bring the air traffic control in Indonesia to a higher level.

A new radar system, the Jakarta Automated Air Traffic System (JAATS), that will be build in Jakarta near the Soekarno-Hatta Airport will in the future be able to reach all islands of Indonesia. It will initially be build and managed by AP 2 to be taken over by PPNPI in the future. Several ministries have issued their approval over the tender documents and the government is aiming to establish the PPNPI agency before the end of this year. The matter is extremely urgent since safety of air travel is an aspect that is directly interconnected with ATC.

![Image of DGCA Indonesia]

**References**

- IndII “Government form ATC agency” 2012
- DGCA “Directorate of Civil Aviation” 2012
- IndII “MP Air Traffic Management” 2012
- IndII “Navigation Radar System” 2012
- Market Profile Aviation SE Asia 2009
- IndII “ATC Unification Urgent” 2012
- Jakarta Post “ATC Navigation” 2012
- Wikipedia DGCA Indonesia 2012
Angkasa Pura 1 is responsible for the operation of thirteen airports located in the eastern part of Indonesia.

As all airports in Indonesia are experiencing, the increase in air traffic has had a noticeable impact for Angkasa Pura 1. The combined thirteen airports experienced a growth in passenger traffic of 14% to a total handling of 56 million passengers in 2011. Resulting in a revenue increase of 23.3 per cent in comparison to the previous year, to 3 trillion IDR (+/- 250 million EUR).

All the developments have contributed to an increase in total assets for AP 1 to IDR 10.1 trillion (+/- 840 million EUR) in 2011 from IDR 9.19 trillion in 2010.

State owned operator Angkasa Pura 1 (AP 1) mentioned its passenger growth was up a total of 15 percent in the first quarter of 2012.

The three major airports that are the largest contributors to the air traffic in terms of passengers, operated by Angkasa Pura 1 are:

- Juanda Airport Surabaya 13.8 million
- Ngurah Rai Airport Denpasar 12.7 million
- Hasanuddin Airport Makassa 7.4 million

In terms of growth, the following airports have respectively booked the highest passenger growth:

- Adisumarmo Airport in Solo 22.69 per cent
- Ahmad Yani Airport Semarang 19.74 per cent
- Selaparang Airport Lombok 16.52 per cent
Angkasa Pura 1 has formed four subsidiaries with the purpose of increasing revenues and developing non-aeronautical activities; AP Support, AP Hotels, AP Property & AP Logistics. A total capital of 100 billion IDR was issued for the establishment of the subsidiaries.

**AP Support** moves in the field of the provision of goods and services with the objective of increasing the customer satisfaction index for the AP 1 airports and increase the share of non-aeronautic revenue by support in the area of equipment (X-ray/ Sweepers/ Metal detector/ etc.), systems (Payment/ Parking/ Communication/ etc.) and services (Training/ Events/ HRM/ etc.).

**AP Property** is developing high-quality property in line with the Airport City concept. Recent products are: the ‘Condotel Sunset Road’ in Bali, the ‘Kelan Bay’ at the side area of Ngurah Rai airport with a resort, commercial area, General aviation terminal and Yatch Marina and a ‘Private Terminal’ at Ngurah Rai airport that serves non-regular flights (VVIP, VIP and CIP private flights).

**AP Hotels** is currently developing two budget hotels at Surabaya and Makassar Airport. The long-term planning is to build 1000 rooms in three years and 2000 rooms in five years.

**AP Logistics** moves in the field of logistics, freight forwarding and regulated affent as supporting operational airport, an increase of service and flight safety.

With these and additional plans, AP 1 is aiming to multiply its non-aeronautic business revenue from 30 to 60 per cent by 2020. Through all planned expansions and developments, AP 1 is targeting its revenue to rise to IDR 3.6 trillion by the next year, a total increase of 20 per cent.

**Development plans**

AP 1 is planning to develop eight of its 13 airports in the period of 2011-2013. Five airports will be developed under the new Airport City Concept whereby generating revenues form non-aero activities are the source of financing. They will not only focus on handling of the air traffic and passengers sufficiently but will offer an overall experience for the people regarding improvements in facilities and offer of non-aeronautical activities.
Because of the burden on many airports operated by Angkasa Pura 1 due to overcapacity several developments plan are in the process of being implemented. The development plans are in line with the MP3EI Masterplan and the ASEAN open skies agreement to further develop the infrastructure of Indonesia.

Large projects include the development of the Bali, Ngurah Rai, greenfield Airport together with the Indian GVK Group; approximately 40 per cent of the tourists pass through this airport. In the last five years, the airport experienced an average annual passenger growth of 15 per cent. Aircraft movement reached 103,846 airplanes, while as much as 62.1 tons of cargo was handled during the entire year. Anticipating the large expected growth for air traffic through this airport a new airport will be constructed in North Bali in which flights can be diverted to decrease the burden. In addition, the Lombok Airport will be developed to comply with the increasing popularity of this island amongst tourists.

Juanda airport is the largest airport in terms of air traffic managed by AP 1 with total passenger traffic of 18,778 million in 2011 and also operating well above its capacity. Since 2006 until 2011, passenger traffic rose by 54 per cent, or from an average of 24,3 thousand passengers per day to 37,5 thousand passengers per day. As for cargo traffic, volume increased by 71 per cent from 152 tons per day to 260 tons per day. With the completion of the new terminal in 2012, it will be able to serve an additional 4 to 5 million passengers annually. Besides the terminal construction, investments are made to further develop the airport under the Airport City concept. The airport will jointly be managed with the South Korean counterpart Incheon Airport to benefit from its expertise and to stimulate developments of commercial non-aero activities.

The Sepinggan International Airport, Balikpapan, is currently experiencing overcapacity of approximately 3 million passengers. The planned developments for this airport include a new terminal, large upgrade of the commercial area and many additional facility developments. Planned to be operational by 2013, the airport will be able to handle 10 million passengers annually.

A new greenfield airport will be developed in Yogyakarta that will replace the existing Adi Sutjipto airport. Operations will be moved to the new airport upon completion. The new airport will

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<th>Note</th>
<th>Time</th>
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<td>Sepinggan (Balikpapan)</td>
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<td>Still working on master plan</td>
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<td>Still setting up</td>
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<td>Juanda (Surabaya)</td>
<td>IDR 418 billion</td>
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require an investment of IDR 1.2 trillion. To acquire the needed funds a Joint Venture will be established between AP 1 and the Indian conglomerate GVK Group. GVK Group will own 49 per cent due to limitations set by the Indonesian government for foreign investors to own a majority in JV’s. A similar case is the Selaparang Airport in Lombok that has been relocated to Mataram and known under the name “Lombok International Airport”.

Additional development plans of the airports operated by Angkasa Pura 1 can be found in Appendix 4.3 at the end of this report.
PT Angkasa Pura 2

Angkasa Pura 2 is responsible for the operation of twelve airports in Western Indonesia, mainly located on the Sumatra Island and the Western part of Kalimantan, including Indonesia’s largest Airport, Soekarno-Hatta, in Jakarta. Currently only two out of the twelve airports still have adequate capacities for handling the air traffic, namely Sultan Iskandar Muda Airport in Aceh and Halim Perdanakusuma Airport in Jakarta. Soekarno-Hatta is currently operating at roughly twice its terminal capacity and is the 16th busiest airport in the world in terms of passenger handling.

Revenues in 2011 reached a staggering IDR 3.5 billion, 12 per cent up from preceding year, with a net profit of IDR 1 trillion. The profits are however expected to drop by IDR 120 million this year due to the take over of its air traffic control business by the government and the revamp of current airports. This forces AP 2 to restructure its current business model and generate more revenue from non-aero activities.
Development plans

Many developments are taking or are going to take place for the airports that are operated by AP 2. Several projects are already to be completed by the end of 2012.

Additionally budget is being allocated for several other developments namely:

- IDR 716.8 billion for safety & security
- IDR 552.8 billion for flight management
- IDR 969.5 billion for passenger services

For the airport developments AP 2 will allocate its own funds and make use of loans issued by banks. Due to the available funds generated from the airport revenues from AP 2, several banks have shown interest in providing loans.

The largest problem for the developments is the Jakarta, Soekarno-Hatta, International Airport. A new fourth terminal will be constructed together with a third runway, cargo terminal and additional facilities and expansions.

The estimated growth in air traffic for this airport however cannot be compensated with the development plans. By 2014 the airport will have a capacity of 64 million passengers, which will by than most likely still not be able to provide sufficient capacity.

The government is therefore exploring the feasibility for the development of a new commercial airport for the greater Jakarta Area. The airport is intended to be build in Karawang, East of Jakarta, and will have an ultimate capacity of 70 million passengers. Construction should commence in 2014 in that by 2019 the air traffic of the Greater Jakarta Area can be shared amongst these airports. The project will require an expenditure of over IDR 10 trillion.

Additional development plans of the airports operated by Angkasa Pura 2 can be found in Appendix 4.3 at the end of this report.

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Interesting Facts:

- In 2025 the demand for Indonesia’s largest International Airport Soekarno-Hatta is estimated to reach 87 million passengers
- Soekarno-Hatta is the 12th busiest airport in the world.
2.8 Additional Airport Development Plans

Besides current development plans under the MP3IE scheme there are several other projects offered via Public Private Partnerships (PPP) to accelerate infrastructure provision. Under this scheme the private sector is able to invest in certain project that are supported by the government.

Projects offered under the PPP scheme (PKPS):

- **Ready for Offer**
  - New Airport Development in South Jakarta Airport, Pandeglang, Banten
  
  The permit to develop this new commercial airport in Pandeglang is currently issued and the government asked the Banten province to speed up attracting private or foreign investors to initiate the project. The airport is estimated to attract 12 million domestic passengers by 2020.

- **Potential project**
  - Development of Tjilik Riwut Airport, Central Kalimantan
  - Development of New Bali Airport, Bali
  - Development of Singkawang Airport, West Kalimantan
  - Expansion of Dewandaru Airport Karimun Jawa, Central Java
  - Kulonprogo International Airport, DI Yogyakarta
  - Kertajati International Airport, West Java
  - Development of New Samarinda Airport, East Kalimantan

Additionally there are many other developments and further expansion projects taking place or in the process of being implemented in Indonesia. For the island of Papua for instance, a total budget of IDR 733 billion (+/- 60 million EUR) is allocated for numerous developments and expansions for its airports.

The cooperation via the PPP scheme between the government and the private sector can be structured with the private sector and the direct government or a State Owned Airport Company or through export credit financing for projects under a State Owned Airport Company.

To enhance the participation of the private sector in infrastructure development the Indonesian government issued Presidential Regulation No 13/2010 regarding PPP that includes several improvements such as land capping and state guaran-
Breakthrough policies in this new regulation include:

- Land will be provided by the government before tender process
- Establishment of government support and guarantee
  - Land Acquisition
  - Construction
  - Permit
  - Fiscal Support
  - Tax Support
- Simplified procurement process and possibility of unsolicited projects
- Shareholder restructuring to strengthen the Special Purpose Vehicle (SPV) in infrastructure

In addition to the PPP projects the government will receive, review and approve projects that are acceptable for external loans or grants. These projects are released in what is known as the Blue Book, a document that is revised regularly to account for any adjustments or cancellations of the originally submitted and approved projects.

**Blue Book 2011-2014, External Loans**
- Airport Development for Disaster Measure & Border Region Development
- Enhancement of Safety for Air Link to Eastern Indonesia
- New Comm, Nav, Surveillance, & Air Traffic Mgmt (CNS/ATM) System
- Procurement of Fire Fighting Equipment & Airport Rescue
- Development of Airport in Papua

**Blue Book 2011-2014, External Grants**
- Procurement & Installation of Security Equipment
- Enhancement of Inspector Competencies in DGCA
- Technical Assistance on Aviation Security
- Master Plan Study on Multiple Airport Development for Jakarta Metro Area
2.9 Concluding remarks

The airport sector in Indonesia is developing at a rapid pace. As an emerging market there is still large room for future growth. The sector is divided amongst few large operators that are state owned and operated. This can offer advantages as well as disadvantages. With contacts in the right place in one of the organizations, you are immediately exposed to a large portion of the market. However, this can also work against you in that you will have to be able to create the relevant contacts.

Gross of the airports in Indonesia however are legging behind in terms of development in comparison to that in the western world. Without the current developments being implemented, the consequences for air traffic in Indonesia could be devastating. There already is a major problem regarding the management of air traffic that is causing inefficient traffic but also contributing to the relatively low levels of safety. Accidents are regretfully not an infrequent occurrence in the airport sector in Indonesia.

The need for acceleration of the airport developments therefore is indisputable. This does offer many opportunities for foreign companies that are willing to expand their business in Indonesia. The challenge in this matter is how to enter the market and how to expand your activities.
Doing Business in Indonesia
3.1 Background

The business culture in Indonesia is distinctively different in comparison to that of the western countries. The diversity within the country leads to many regional differences, adding up to the already complex business environment in Indonesia. There are many different ethnic groups in Indonesia each with other beliefs and habits. The largest ethnic group in Indonesia is the Javanese that account for approximately 50 per cent of the total population and live on the island where their name is derived from, Java. Another large ethnic group are the Sundanese that account for approximately 15 per cent of the population and also mainly live on the island Java.

There are several different aspects that can influence a business relation in Indonesia other than what you are used to when doing business in western countries. It therefore is important to be aware what to expect when doing business in Indonesia and use this knowledge to your benefit in building a long-lasting beneficial relationship.

3.2 Business Culture & Etiquettes

In regards to the communication in Indonesia you have to take into account that there are some important perceptual differences. Indonesians tend to be less direct in their communication towards others; this especially is a large difference in comparison with the Dutch culture. Indonesians are polite in their communication and will try to avoid confrontations in a conversation. This means that they will try not to decline a request and avoid saying no, which might lead to conflicting expectations. The answer cannot always be derived from words alone, manner of speech and body language can provide more information about what exactly is meant.

Punctuality can sometimes have a different meaning in Indonesia. It is not uncommon for a meeting to be half an hour or more postponed. Time, and therewith urgency, are not always a high priority in business. Prepare to be creative with your time planning when doing business in Indonesia.

Business organizations tend to be very hierarchical, this is especially true for governmental organizations. It is advisable to be in contact with the highest level of the organization in order to present yourself accordingly. Status is of great importance in the society and

Interesting Facts:
- Bahasa Indonesian actually has 12 ways of saying "No" and several other ways of saying "Yes" when the actual meaning is "No"
- The national motto of Indonesia is “Unity in Diversity"
business climate. Respect should be shown to senior management and elderly in general.

Indonesia is the largest predominantly Muslim country in the world. Religious beliefs and habits have to be respected to avoid offending people. There are many different habits and traditions that can also differ per ethnic group and religion. Do not be surprised when some of these habits are conducted during a business meeting.

A good business relationship in Indonesia is a key element for success. Time and Effort should be invested in building and maintaining a steady relationship. Expecting to instantly do business in Indonesia can be a misconception and might be harmful to the relationship. With patience and goodwill you will form the foundation for a good business relation.

3.3 Challenges

Doing business in Indonesia presents many challenges for foreigners not acquainted with the cultural differences. Bribery and Corruption can oppose a large challenge when doing business in Indonesia. This can be in the form of presenting expensive gifts to persuade your business partners up to making facilitating payments to get projects assigned accordingly.

Recent years there have been several prosecutions against this form of corruption that make the way to a more transparent way of doing business. These are only the first steps in the fight of corruption, which will not be easy to eliminate entirely from the society any time soon. If ran into a certain situation it is better not to let yourself be involved with this type of affairs since this will only create more expectations for future business.

Protecting your characteristic product in Indonesia can oppose to be another challenge. From the 1990s great progress has been made in the field of protecting intellectual property. Several new laws were enforced and international agreements signed in this aspect. Enforcing the laws surrounding copyright protection and patents in practice still is very limited however. The main reasons are that many agreements and laws in this field are developed in western countries and thus under other cultural norms, economic interests and in different economic climates. This can create conflicts that are difficult to dispute under Indonesian laws.

It is therefore important to be aware of the conflicts that can arise regarding protecting your intellectual property when doing business in Indonesia.
**Bureaucracy** can also oppose a challenge in doing business in Indonesia. Many registration processes can take up unnecessary much of your time. It is recommendable to have a local experienced partner to assist you in these matters. This can speed up the process considerably and decrease the change of exposure to long unnecessary bureaucratic procedures.

### 3.4 Market Entry

Indonesia can be a difficult market for a foreign company to navigate in. Without any basic knowledge of the market and experienced contacts in Indonesia, it is tough to overcome the faced challenges.

The most common way that foreign companies enter the Indonesian market is through an Agency Agreement (Agent or Distributor) or a local representation office. This is fairly easy and the risks are relatively limited. The most important aspect in these modes is selecting the right partner. A partner with good market knowledge and that is well experienced with local laws and regulations can prevent many possible issues and increase the chance of success.

With a local partner that can help you on your way setting up your activities in Indonesia and finding the right contacts, the most important step is already taken. With patience and perseverance you will be able to establish yourself successfully in Indonesia benefit from the opportunities that come about.
3.5 “Final Advice”

There are an abundance of opportunities in the airport sector in Indonesia for foreign companies. The market is currently developing at a rapid pace with the government putting pressure on implementing the planned developments. The time is now to utilize these opportunities and try to get a foothold in this dynamic country. Building a solid relationship with your partners and understanding the cultural differences will add considerably to the success factor.

Some key-advice to take into account:

- Shaking hands is common for both men and women as introduction
- When offered a drink during a meeting it is common to wait with drinking until invited by the host to do so
- Corporate gifts are acceptable and usually not opened immediately
- Investing time in a meeting and discussing other not business related topics is important for the relationship
- Showing respect when meeting an important person can be shown by bowing from the waist
- In some parts of Indonesia showing the soles of your shoes, crossing your legs when seated and having your hands on your hips or folded can be offending gestures
- Commonly the left hand is not used for giving and reaching for objects
- Status and how Indonesians are perceived is very important, be sure to show the proper respect to your Indonesian counterparts
- Make sure to formally present your business card at the beginning of a meeting
Appendix

4.1 Economic Corridors MP3IE

- Sumatra Economic Corridor: "Center for Production and Processing of Natural Resources and As Nation’s Energy Reserves"
- Java Economic Corridor: "Driver for National Industry and Service Provision"
- Kalimantan Economic Corridor: "Center for Production and Processing of National Mining and Energy Reserves"
- Sulawesi Economic Corridor: "Center for Production and Processing of National Agricultural, Plantation, Fishery, Oil & Gas, and Mining"
- Bali-Nusa Tenggara Economic Corridor: "Gateway for Tourism and National Food Support"
- Papua – Kepulauan Maluku Economic Corridor: "Center for Development of Food, Fisheries, Energy, and National Mining"
4.2 Useful links & Contacts

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### PT Angkasa Pura 1 Airports and developments

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Source: MPR, IndIff, Jakarta Globe, Jakarta Post
## PT Angkasa Pura 2 Airports and developments

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Source: MPIE, Hindli, Jakarta Globe, Jakarta Post
### International Air Traffic Indonesia, 2003-2010

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Source: BPS Statistics: PT (Persero) Angkasa Pura I and II, Ministry of Transportation

### Domestic Air Traffic Indonesia, 2003-2010

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Source: BPS Statistics: PT (Persero) Angkasa Pura I and II, Ministry of Transportation

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4.5 International and Domestic Air traffic Indonesia 2003-2010

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### International and Domestic Cargo Traffic Indonesia 2003-2010

#### Number of Loading Cargo of International Flight at Main Airports
(Polonia, Sukarno Hatta, Juanda and Ngurah Rai Airport) (Tons)

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#### Number of Loading Cargo of Domestic Flight at Main Airports
(Polonia, Sukarno Hatta, Juanda, Ngurah Rai and Hasanudin Airport) (Tons)

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<tr>
<th>Month</th>
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<th>Ngurah Rai</th>
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Source: BPS Statistics; PT (Persero) Angkasa Pura I and II, Ministry of Transportation
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