



School of Business & Management
INSTITUT TEKNOLOGI BANDUNG



UNIT KERJA PRESIDEN
Bidang Pengawasan dan Pengendalian
Pembangunan

Menuju Daya Saing Indonesia: Pelajaran dari *Archipelago Economy* dan *Regional Competitiveness Study*

Dr. Agung Wicaksono

Asisten Ahli Kepala UKP4 dan Dosen S B M I T B

FGD Perkuatan Struktur Industri Nasional
BKTI - PII, 12 Agustus 2014



AGENDA

**McKinsey
Study on
Archipelago
Economy
dan
Debottle-
necking**

Asia
Competitiveness
Institute (ACI)
Regional
Competitiveness
Study

Lessons on
Managing
Decentralized
and
Democratic
Indonesia

INDONESIA ACCORDING TO MCKINSEY'S ARCHIPELAGO ECONOMY

Indonesia today ...

16th-largest economy in the world

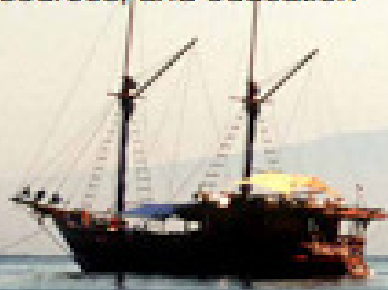
45 million members of the consuming class

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

55 million skilled workers in the Indonesian economy

\$0.5 trillion

market opportunity in consumer services, agriculture and fisheries, resources, and education



... and in 2030

7th-largest economy in the world

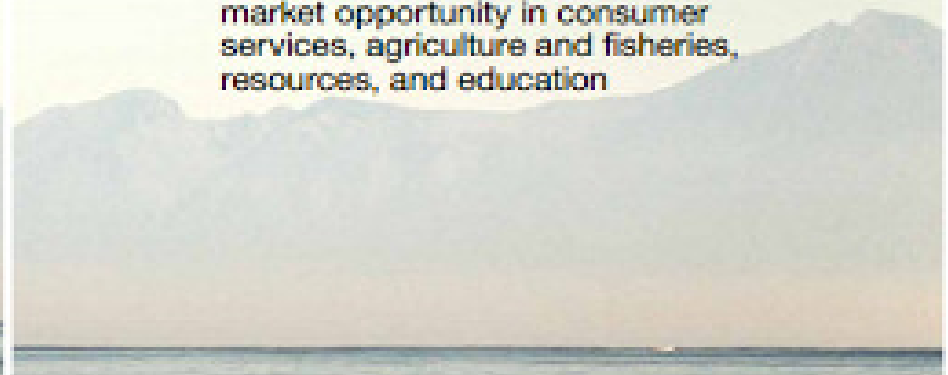
135 million members of the consuming class

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

113 million skilled workers needed

\$1.8 trillion

market opportunity in consumer services, agriculture and fisheries, resources, and education



BEBERAPA PELAJARAN DARI MCKINSEY'S STUDY – MITOS & FAKTA SEPUTAR PERTUMBUHAN EKONOMI NINDONESIA

MITOS

1. Ekonomi Indonesia tidak stabil
2. Ekonomi hanya berkembang di Jakarta
3. Pertumbuhan Ekonomi Indonesia mengikuti *Asian Tiger's Export Driven Growth Model*
4. Pertumbuhan ekonomi Indonesia di dorong oleh *Resource-based*
5. Penggerak pertumbuhan ekonomi Indonesia berasal dari pertambahan jumlah tenaga kerja.

FAKTA

1. Ekonomi tumbuh di Jakarta 5,8%, sedang daerah penyangga (BoDeTaBek) dan daerah seperti Surabaya, Bandung, Pontianak, Medan, Makasar, adalah 6,4%.
2. Ekonomi Indonesia tidak hanya karena *endowment factor* (hanya 11% GDP dari mining dan *oil & gas*) saja, tapi didukung oleh **Domestic Consumption dan Services**
3. Bukan akibat peralihan tenaga kerja dari sektor pertanian ke sektor lain yang lebih utama, tapi **peningkatan produktivitas** terutama di 3 sektor:
 - a. *Wholesale and retail trade*
 - b. *Transport equipment and apparatus manufacturing*
 - c. *Transport and telecommunication*

BEBERAPA PELAJARAN DARI MCKINSEY'S STUDY – TANTANGAN DAN PENDORONG EKONOMI INDONESIA KE DEPAN

TANTANGAN MENCAPAI VISI 2030

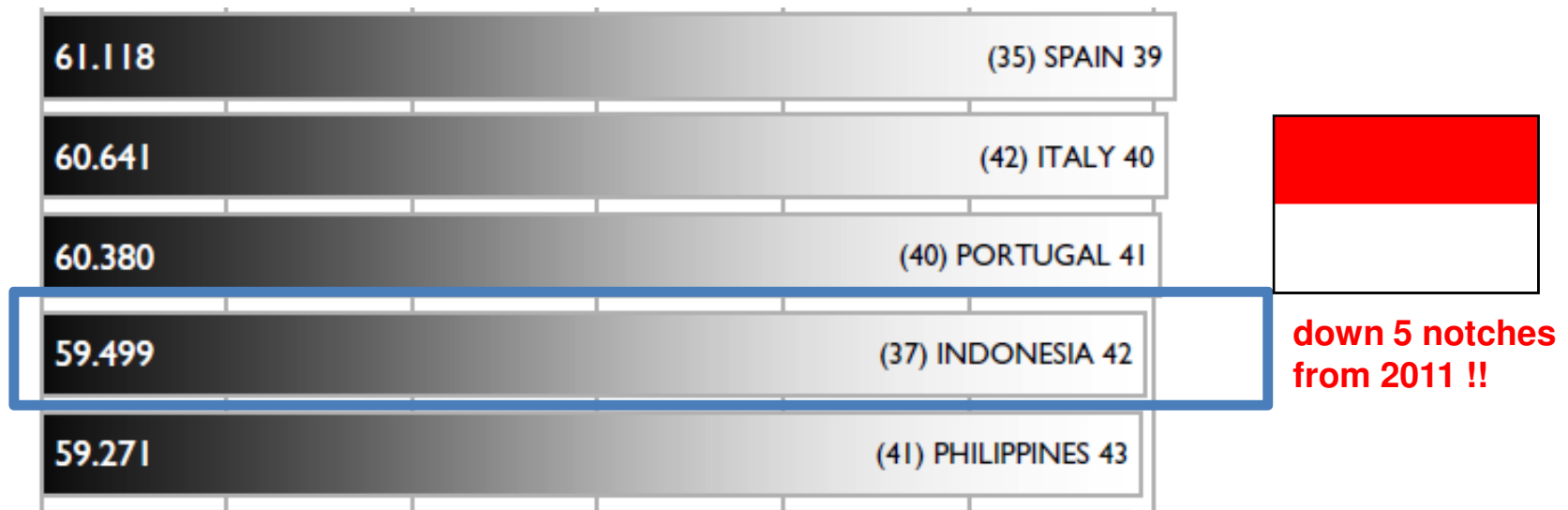
1. Labor productivity
2. Distribution of growth
>> lead to inequalities
3. Infrastructure

SEKTOR YANG PERLU MENJADI FOKUS

1. Transform **CONSUMER SERVICES** on:
 - a. Financial service regulation
 - b. Retail trade (protectionism, lead to inefficiency practices)
 - c. Transportation and Infrastructure
2. Boost productivity in **AGRICULTURE AND FISHERIES**
 - a. Increase 60% productivity by effective land use, not extensive land use
 - b. Agriculture approach: i.) Boosting yield, ii.) Focus on high value crops, iii.) Reduce post-harvest & value chain waste
3. Build **RESOURCE-SMART** economy
 - a. Demand for Steel, oil, gas, coal will dramatically increase
 - b. Focus on unconventional energy: geothermal, biofuels, biomass, etc
 - c. Urban population boom challenge: i.) Basic sanitation, ii.) Clean water supply
4. **SKILL BUILDING** for 90 million additional educated workers

DAYA SAING INDONESIA DALAM IMD'S WORLD COMPETITIVENESS YEARBOOK (2011-2012)

THE WORLD COMPETITIVENESS SCOREBOARD 2012



We learn the lessons, that the drop is mainly due to the 3 factors:

- Lesson 1: Government Efficiency
- Lesson 2: Infrastructure Bottlenecks
- Lesson 3: Business Efficiency

DAYA SAING INDONESIA DALAM IMD'S WORLD COMPETITIVENESS YEARBOOK (2013-2014)

IMD WORLD COMPETITIVENESS YEARBOOK 2014 - OVERALL RANKING							
Country	Rank			Country	Rank		
	2014	2013	Change		2014	2013	Change
USA	1	1	—	Chile	31	30	→
Switzerland	2	2	—	Kazakhstan	32	34	→
Singapore	3	5	→	Czech Republic	33	35	→
Hong Kong	4	3	→	Lithuania	34	31	→
Sweden	5	4	→	Latvia	35	41	→
Germany	6	9	→	Poland	36	33	→
Canada	7	7	—	Indonesia	37	39	→
UAE	8	8	—	Russia	38	42	→
Denmark	9	12	→	Spain	39	45	→
Norway	10	6	→	Turkey	40	37	→
Luxembourg	11	13	→	Mexico	41	32	→
Malaysia	12	15	→	Philippines	42	38	→
Taiwan	13	11	→	Portugal	43	46	→
Netherlands	14	14	—	India	44	40	→
Ireland	15	17	→	Slovak Republic	45	47	→
United Kingdom	16	18	→	Italy	46	44	→
Australia	17	16	→	Romania	47	55	→
Finland	18	20	→	Hungary	48	50	→
Qatar	19	10	→	Ukraine	49	49	—
New Zealand	20	25	→	Peru	50	43	→
Japan	21	24	→	Colombia	51	48	→
Austria	22	23	→	South Africa	52	53	→
China Mainland	23	21	→	Jordan	53	56	→
Israel	24	19	→	Brazil	54	51	→
Iceland	25	29	→	Slovenia	55	52	→
Korea	26	22	→	Bulgaria	56	57	→
France	27	28	→	Greece	57	54	→
Belgium	28	26	→	Argentina	58	59	→
Thailand	29	27	→	Croatia	59	58	→
Estonia	30	36	→	Venezuela	60	60	—



Up 2 notches
from 2013!!

Sumber *bottleneck*

Beragam namun klasik

Birokrasi

Budaya

Kapasitas

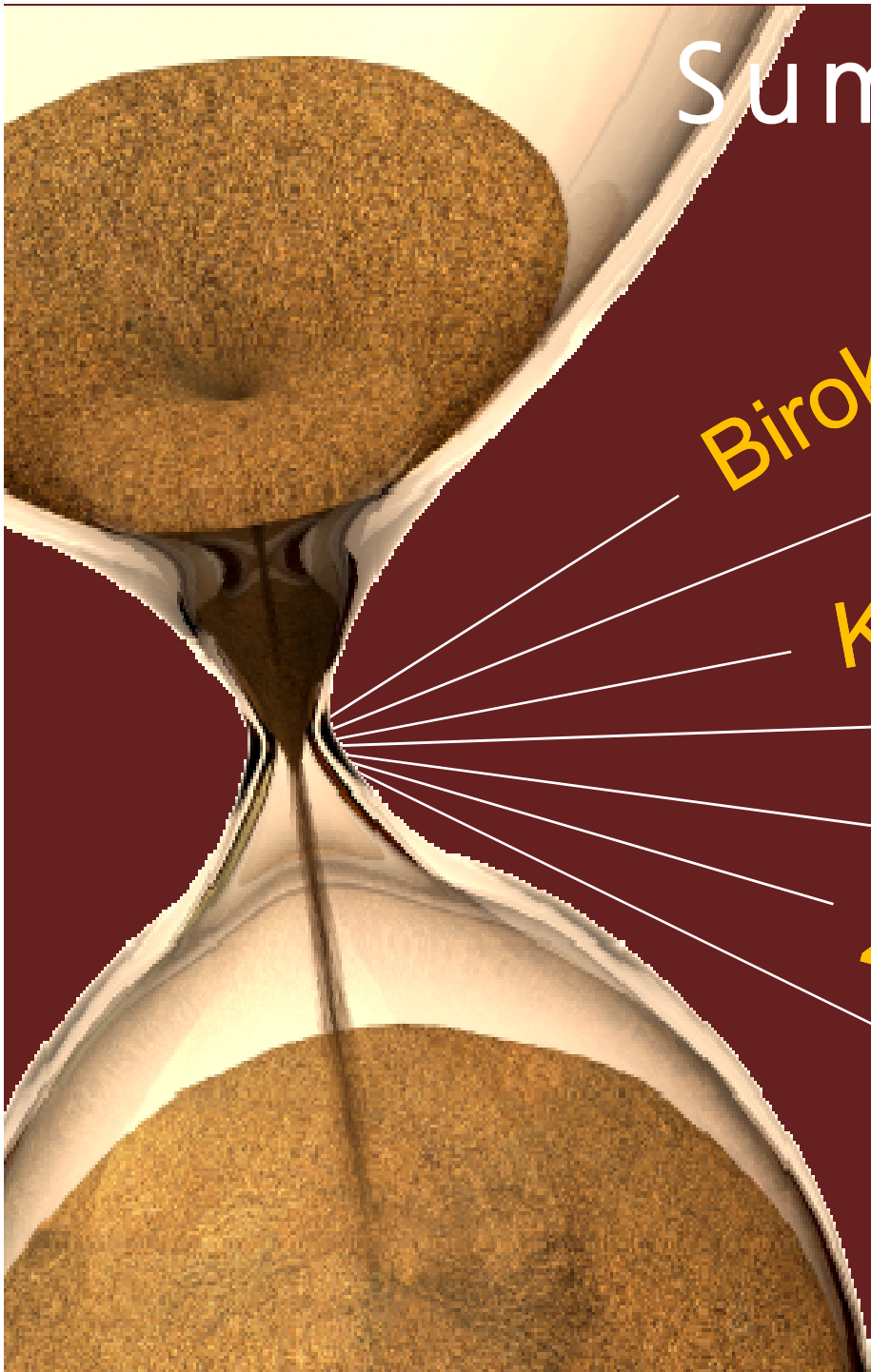
Kemauan

politik

Motif jahat

Zona nyaman

Sumber daya

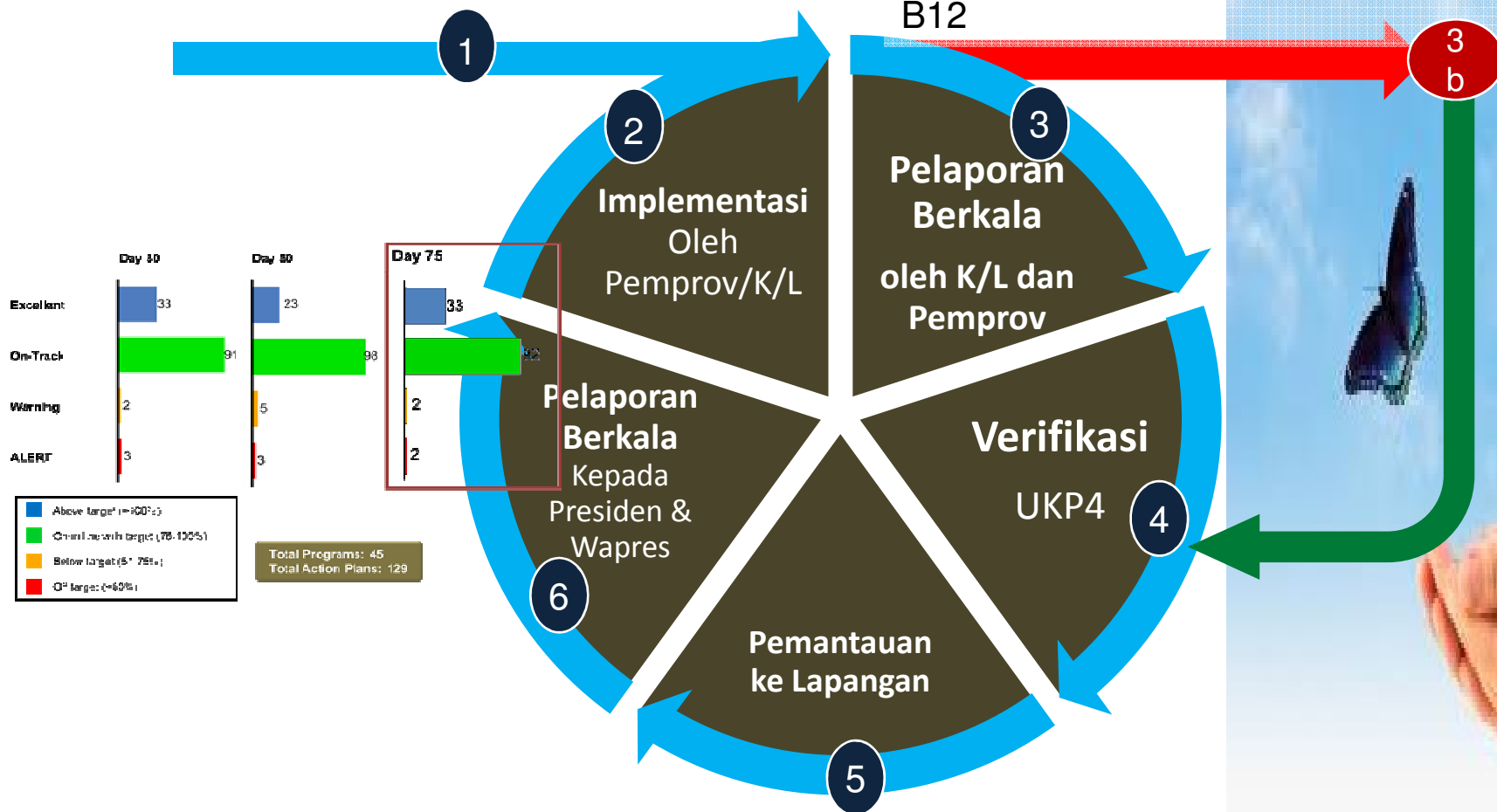


MONITORING MELALUI INPRES BUKAN SEKEDAR 'RAPOR', TAPI MENJADI ENTRY POINT UNTUK DEBOTTLENECKING

Renaksi disepakati di awal tahun

De-bottlenecking

renaksi yang terkendala untuk membantu K/L dan Pemprov untuk mencapai target B12



CONTOH KASUS 1: *FLOATING STORAGE RECEIVING UNIT* (FSRU) JAKARTA

40% listrik JABODETABEK dipasok oleh PLTGU MUARA KARANG.

Selama ini PLTGU tersebut mengkonsumsi BBM dalam jumlah yang cukup signifikan sehingga APBN makin terbebani oleh subsidi listrik

Pemerintah memutuskan membangun FSRU untuk memasok gas ke PLTGU MUARA KARANG sehingga listrik yang dihasilkan lebih murah dan pada akhirnya mampu menekan beban subsidi APBN

FSRU JAKARTA juga akan sangat strategis dalam memasok kebutuhan gas untuk industri di Jawa bagian Barat

Dalam perjalanan pengembangannya, FSRU Jakarta sempat **tersendat dan terancam tidak terealisasi karena **tidak kunjung terbitnya rekomendasi izin lokasi dari Pemprov****

DEBOTTLENECKING FSRU TELUK JAKARTA DENGAN KOORDINASI DIPIMPIN WAKIL PRESIDEN



Lokasi :
Muara Karang, Jakarta Utara

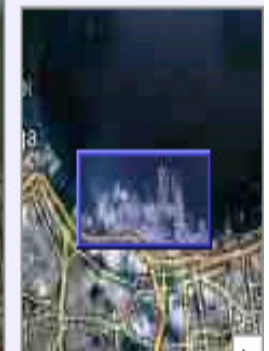
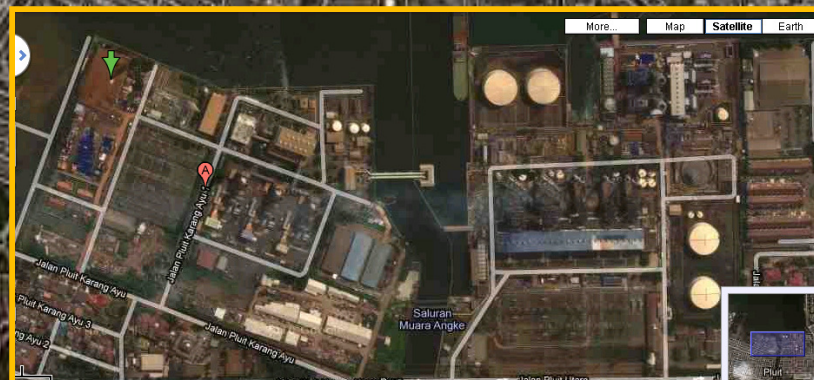
Koordinat:
6.108559 LS, 106.781239 BT

Bermasalah

Status Oktober 2010:

- Lokasi unit di area PLN Muara Karang telah ditentukan
- Kemenhub belum memberikan izin lokasi karena terkendala rekomendasi Pemprov, yang merencanakan reklamasi pantai utara Jakarta
- Setelah didorong oleh rapat Wapres, perizinan oleh Pemda dan K/L terakselerasi
- HoA pembelian dan penjualan gas dapat ditandatangani dengan adanya kepastian izin

6.108559 LS, 106 781239 BT

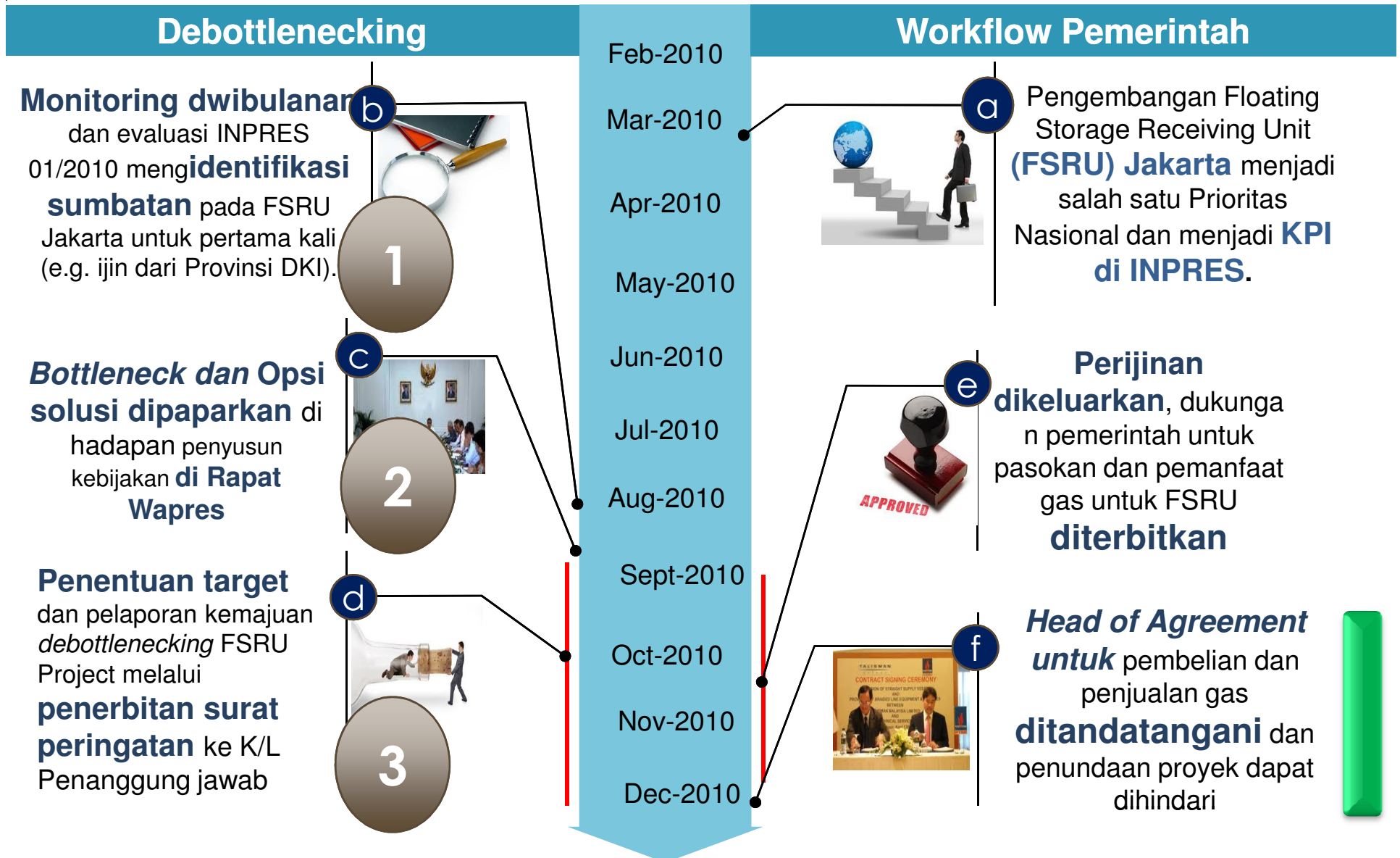




KOMPLIKASI DALAM KOORDINASI



FLOW DEBOTTLENECKING FSRU JAKARTA UNTUK MENGAMANKAN PASOKAN GAS JAWA BAGIAN BARAT DAN MENGURANGI DEFISIT APBN



FLOATING STORAGE RECEIVING UNIT (FSRU) DIRESMIKAN PRESIDEN PADA 6 DESEMBER 2012



MANFAAT YANG DIPEROLEH NEGARA



- Full on-stream 1 September 2013 (260 BBTUD)
- Penghematan BBM 2,4 juta USD/hari

CONTOH KASUS 2: DEBOTTLENECKING PEMBANGKIT LISTRIK TENAGA PANASBUMI (PLTP) SARULLA

Sejak
1992



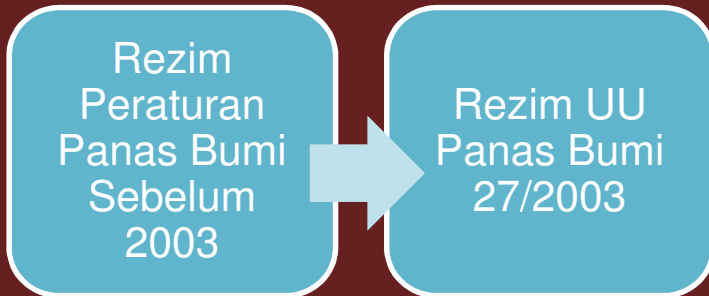
PERJALANAN PANJANG MENUJU ENERGI HIJAU:



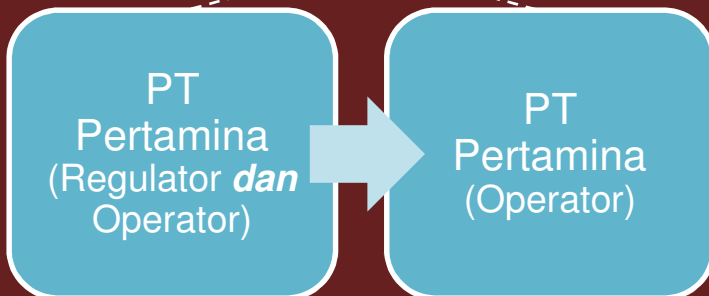
PLTP SARULLA

TANTANGAN BOTTLENECK

BOTTLENECK REGULASI



**PERLUNYA KEPASTIAN HUKUM
UNTUK PROSES BISNIS DAN
PENGELOLAAN ASET PADA
MASA TRANSISI!**



BOTTLENECK BIROKRASI



SETELAH 20 TAHUN TERHENTI (DAN 27 BULAN DITANGANI WAPRES)...



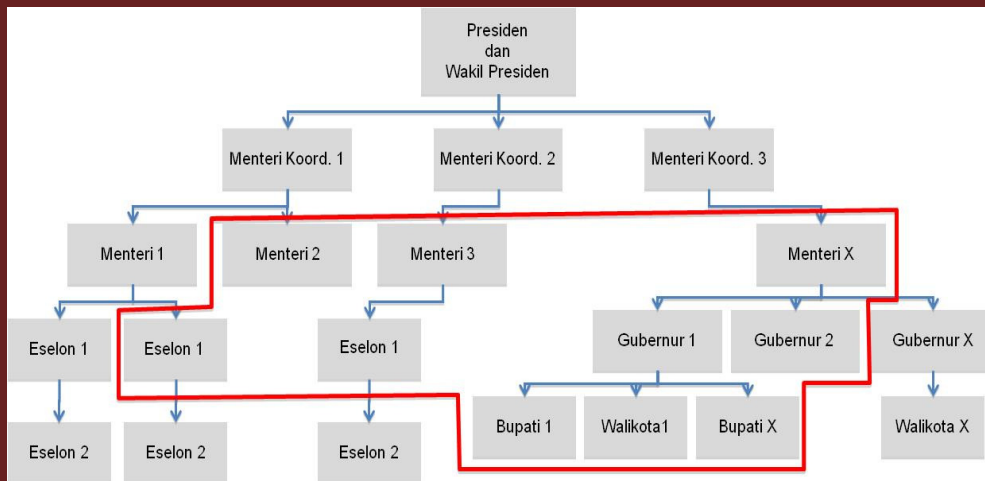
**Persetujuan Amandemen ESC/JOC dan Penyerahan Surat Jaminan
Kelayakan Usaha**

<https://www.youtube.com/watch?v=OZnNYsmeWAM>

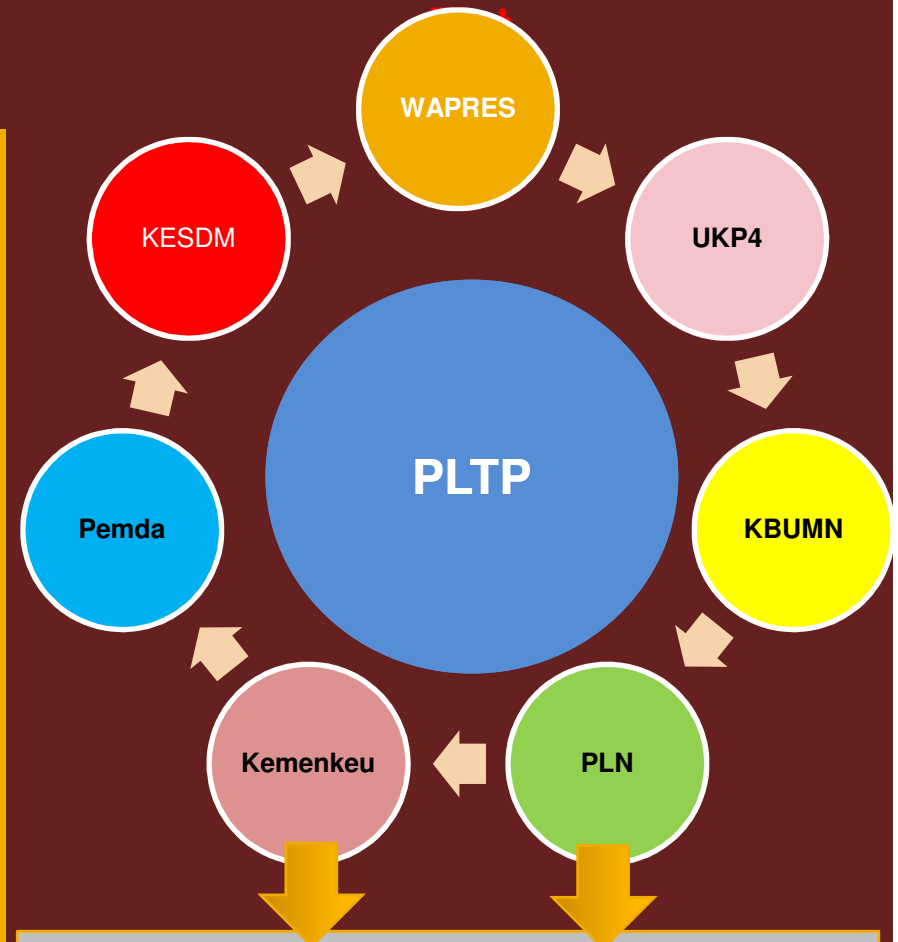
PERLU PENDEKATAN BARU YANG BERORIENTASI PADA KEBUTUHAN UNTUK PERCEPATAN PROGRAM

DARI

Hierarchical



MENJADI...



SJKU (PJ: Menkeu) & PPA (PJ: PLN)
ditandatangani bersama 2 Maret 2012

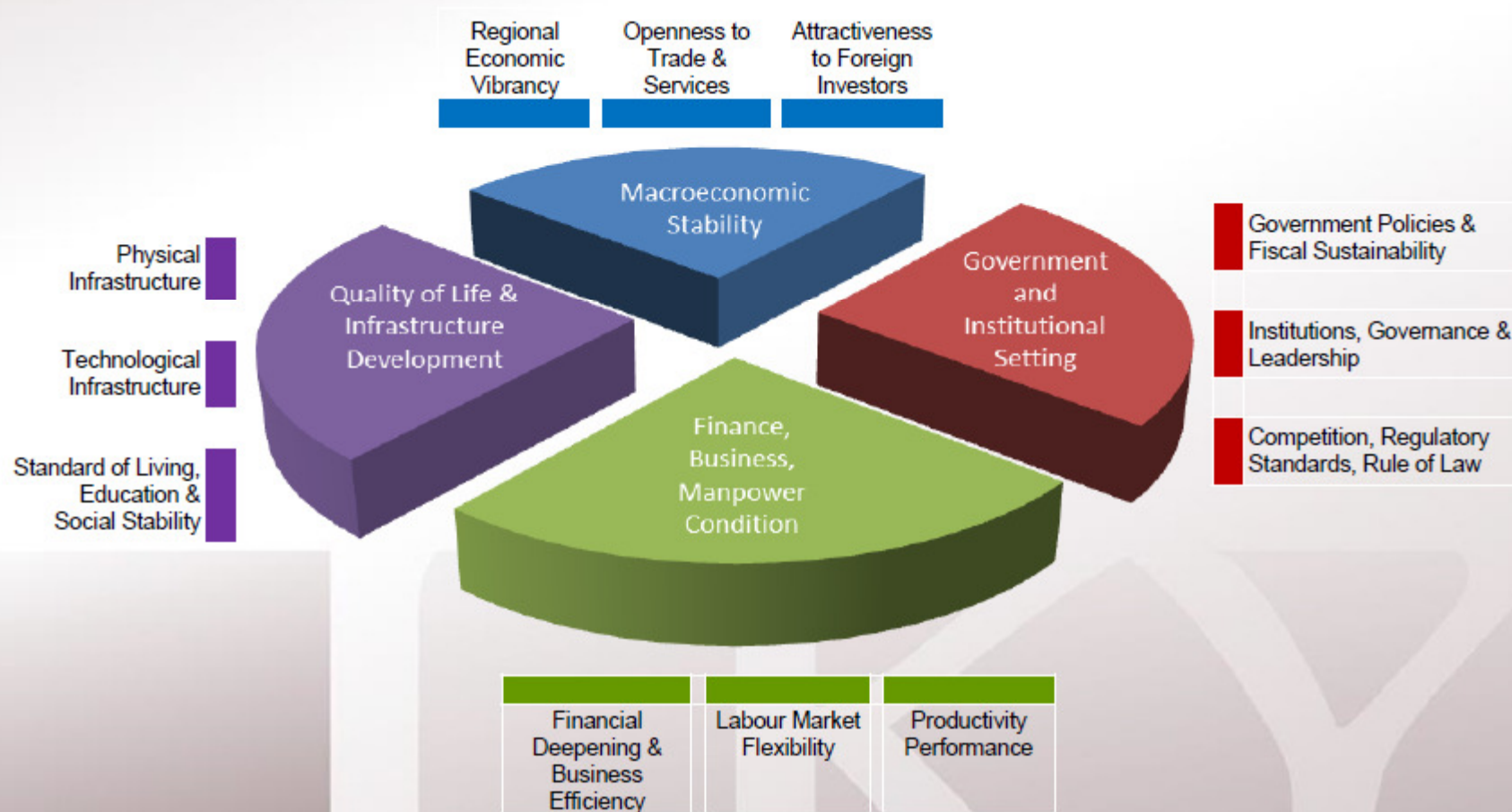
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Decentralized
and
Democratic
Indonesia

ACI Competitiveness Framework



2014 Annual ACI Update on Competitiveness Ranking of 33 Indonesian Provinces

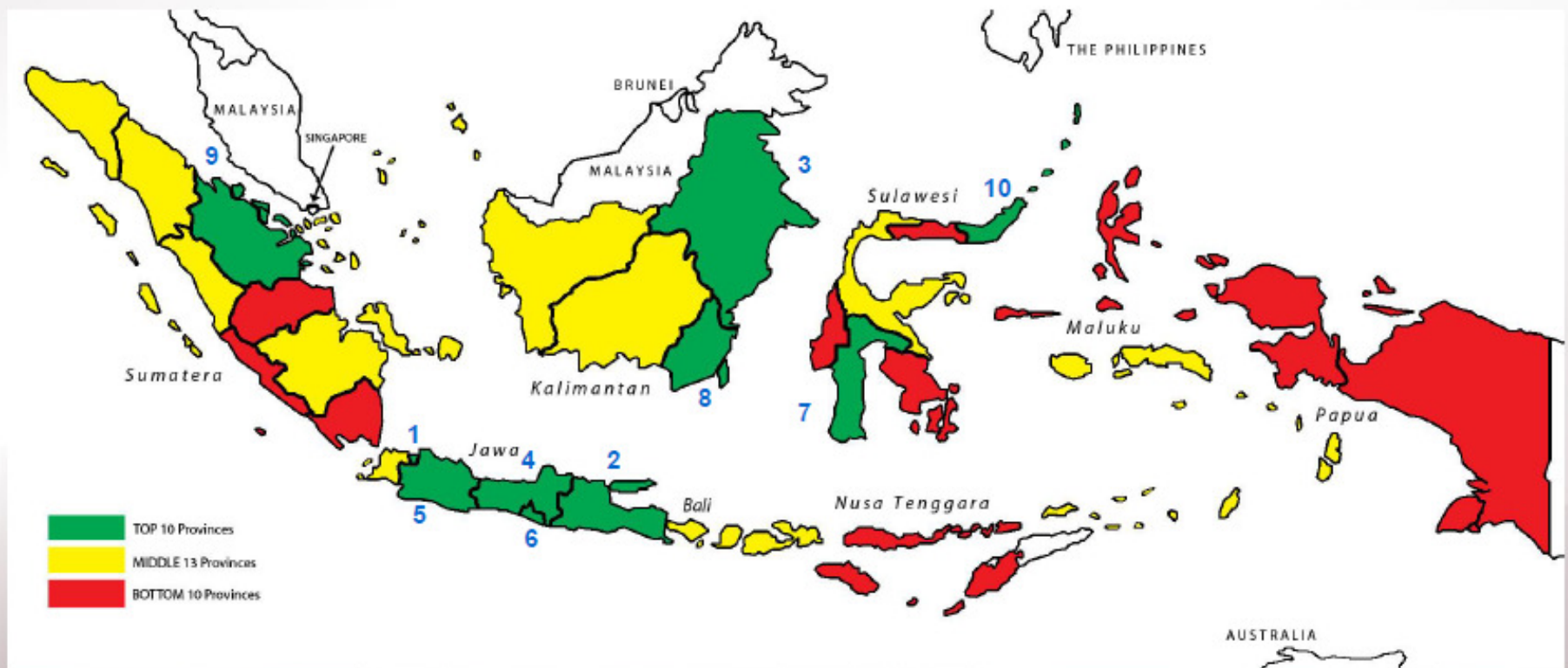
Overall Competitiveness: Ranking & Score

Rank 2014	Rank 2013	Province	Score
1	1	DKI Jakarta	3.3580
2	2	East Java	1.8152
3	3	East Kalimantan	1.5566
4	5	Central Java	1.3262
5	4	West Java	1.0834
6	6	DI Yogyakarta	0.7047
7	11	South Sulawesi	0.6684
8	13	South Kalimantan	0.4884
9	10	Riau	0.3731
10	14	North Sulawesi	0.3109
11	8	Riau Islands	0.2901
12	7	Banten	0.1672
13	16	Aceh	-0.0109
14	9	Bali	-0.0179
15	26	Central Kalimantan	-0.0754
16	12	South Sumatra	-0.1676
17	17	West Sumatra	-0.2179

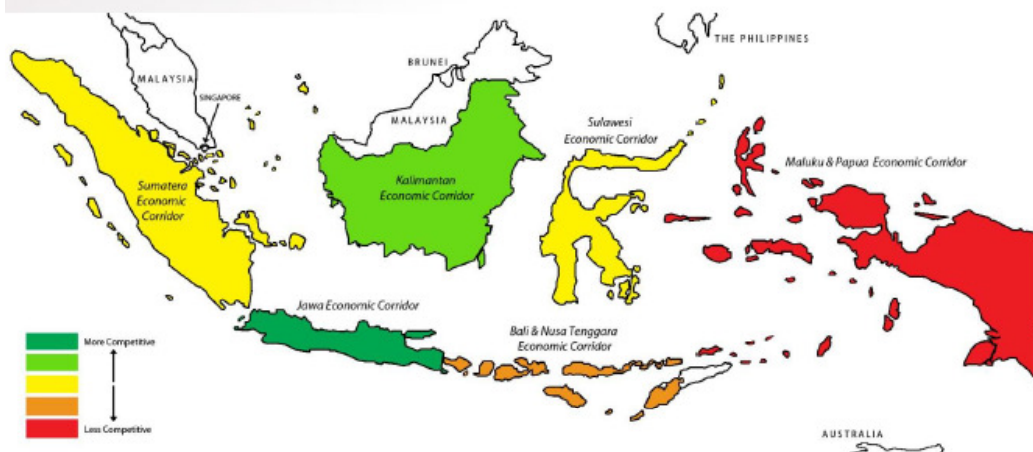
Rank 2014	Rank 2013	Province	Score
18	22	West Kalimantan	-0.2234
19	19	North Sumatra	-0.2594
20	29	Bangka Belitung Islands	-0.2756
21	23	Central Sulawesi	-0.3553
22	28	West Nusa Tenggara	-0.3733
23	31	Maluku	-0.5685
24	20	Lampung	-0.5773
25	21	West Sulawesi	-0.5870
26	30	West Papua	-0.7013
27	25	Jambi	-0.7379
28	15	Gorontalo	-0.7549
29	18	Southeast Sulawesi	-0.7833
30	27	Bengkulu	-0.9576
31	24	Papua	-1.2268
32	33	East Nusa Tenggara	-1.5634
33	32	North Maluku	-1.7075

2014 Annual ACI Update on Competitiveness Ranking of 33 Indonesian Provinces

Overall Competitiveness



The Inaugural 2014 ACI Competitiveness Ranking of Indonesia's Six Regions



The six economic corridors are informed by Indonesia government's regional grouping into six "Economic Corridors" (as per Master Plan for Acceleration and Expansion of Indonesia's Economic Development / MP3EI)

Sumatra Region

Aceh, North Sumatra, West Sumatra, Riau, Riau Islands, Riau, Bangka Belitung Islands, Jambi, Bengkulu, South Sumatra, and Lampung

Java Region

Banten, DKI Jakarta, West Java, Central Java, DI Yogyakarta, and East Java

Kalimantan Region

West Kalimantan, Central Kalimantan, South Kalimantan, and East Kalimantan

Sulawesi Region

North Sulawesi, Central Sulawesi, Gorontalo, West Sulawesi, Southeast Sulawesi and South Sulawesi

Bali-Nusa Tenggara Region

Bali, West Nusa Tenggara, and East Nusa Tenggara

Maluku-Papua Region

Maluku, North Maluku, Papua, and West Papua

Rank	Province	Score
1	Java Region	1.7233
2	Kalimantan Region	0.6511
3	Sulawesi Region	-0.0392
4	Sumatra Region	-0.0741
5	Bali - Nusa Tenggara Region	-0.9839
6	Maluku - Papua Region	-1.2772

Policy Implications for Regional Economic Development Strategies

- Competitiveness is determined by ability to perform on all four of ACI's competitiveness environments.
 - Top-performing regions (Java, Kalimantan) did well on macro & micro economics, governance, and infrastructure aspects.
 - Medium-performing regions (Sulawesi, Sumatera) did well on some aspects, but not on others. For example, Sumatera had good macroeconomic performance but Sulawesi did much better on governance.
 - Bottom-performing regions (Bali-Nusa Tenggara, Maluku-Papua) had low scores for multiple aspects, and challenged by small population spread out in largely rural and archipelagic areas.
- Balanced regional development is important. However, growth is uneven and should be facilitated through multiple growth centres. The MP3EI master plan highlights several growth centres that need to be followed through consistently.
- Needed: Friendly rivalry among regions to attract FDI, offering good infrastructure support and public policy incentives that benefit the region in the long run.

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DESENTRALISASI ADALAH BIBIT LAHIRNYA GENERASI BARU PEMIMPIN INDONESIA

Pemimpin dengan latar belakang beragam, (relatif) muda, dan kompeten di PEMDA



Joko Widodo (Jokowi)

Walikota Solo
Gubernur Jakarta



Ridwan Kamil (Emil)

Walikota Bandung



Tri Rismaharini (Risma)

Walikota Surabaya



“A-Hok” (Basuki TP)

Bupati Belitung Timur,
Wagub Jakarta

HAL-HAL KECIL DARI DAERAH YANG MEMBANGUN OPTIMISME



SURABAYA

Transformasi dari Taman Bungkul, e-government sampai Dolly



SOLO

54x makan siang negosiasi untuk pemindahan PKL tanpa kekerasan



JAKARTA

YouTube menyiarkan rapat untuk transparansi anggaran dan pencegahan korupsi

UKP4 MENDUKUNG PIMPINAN DAERAH PROGRESIF DENGAN LAPOR! – (Layanan Aspirasi & Pengaduan Online oleh Rakyat)

News (<http://news.kompas.com>) / Regional (<http://regional.kompas.com>)

Ridwan Kamil Senang Program "Lapor"

Selasa, 13 Mei 2014 | 18:33 WIB



News > Megapolitan

Basuki: LAPOR Jadi Indikator Pecat Kepala Dinas

Penulis : Kurnia Sari Aziza

Kamis, 18 April 2013 | 17:58 WIB



Kepala Unit Kerja Presiden Bidang Pengawasan dan Pengendalian Pembangunan (UKP4) Kuntoro Mangkusubroto (kiri) bersama Wakil Gubernur DKI Jakarta Basuki Tjahaja Purnama (kanan) menandatangani memorandum of understanding (MoU) layanan pengaduan online rakyat (LAPOR) di Kantor UKP4, Jakarta, Kamis (18/4/2013). | Kompas.com/Kurnia Sari Aziza

PEMBANGUNAN & PELAYANAN PUBLIK DI KOTA BANDUNG TIDAK BERES?
Laporkan semuanya melalui

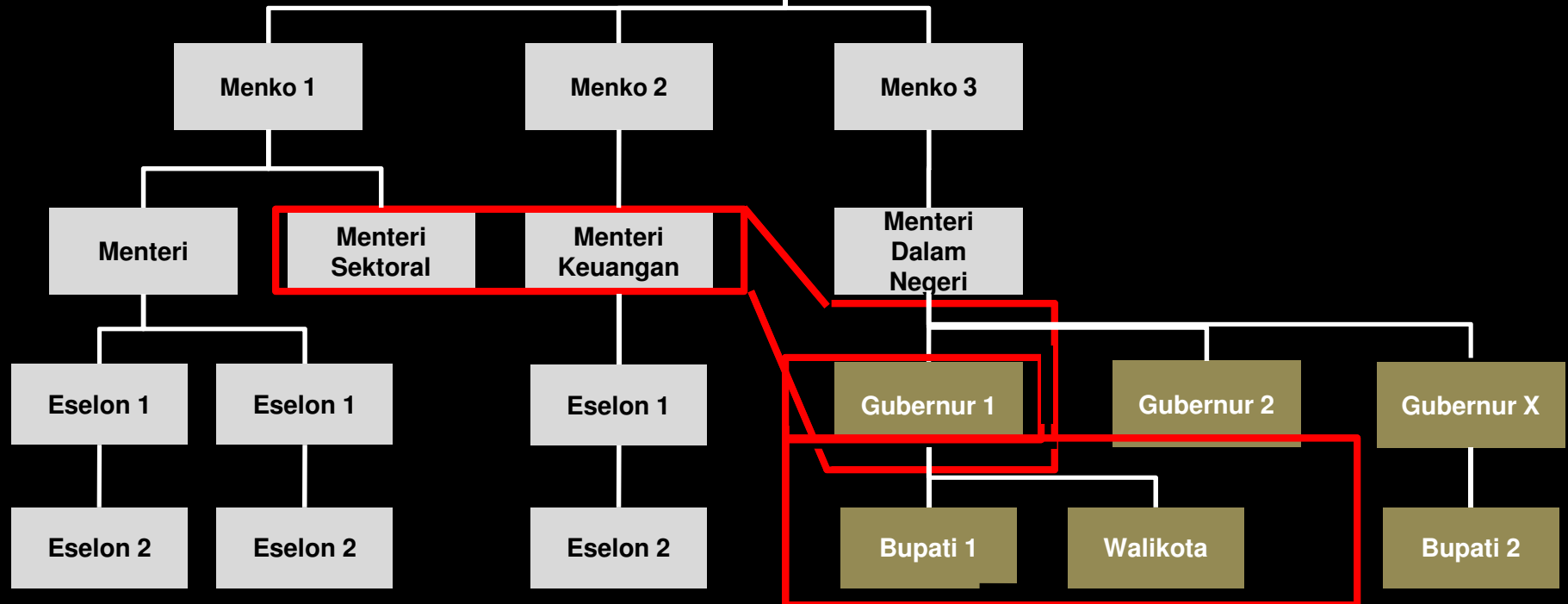
lapor.ukp.go.id

BDG <spasi> isi aduan
SMS ke **1708**

Unit Kerja Presiden Bidang Pengawasan dan Pengendalian Pembangunan

LAPOR!

DESENTRALISASI DAN TIGA LAPIS PEMERINTAHAN: BAGAIMANA MENGATASINYA?



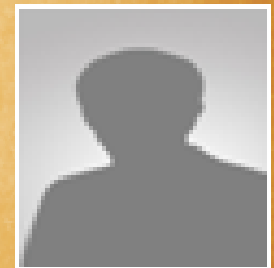
DESENTRALISASI DI INDONESIA LAHIR KARENA DESAKAN KEADAAN



“Dengan tiga lapis pemerintahan yang semuanya dipilih rakyat, Indonesia menjadi negara tanpa hirarki...”

(Kuntoro Mangkusubroto, 15 April 2014 di The Economist's Indonesia Summit)

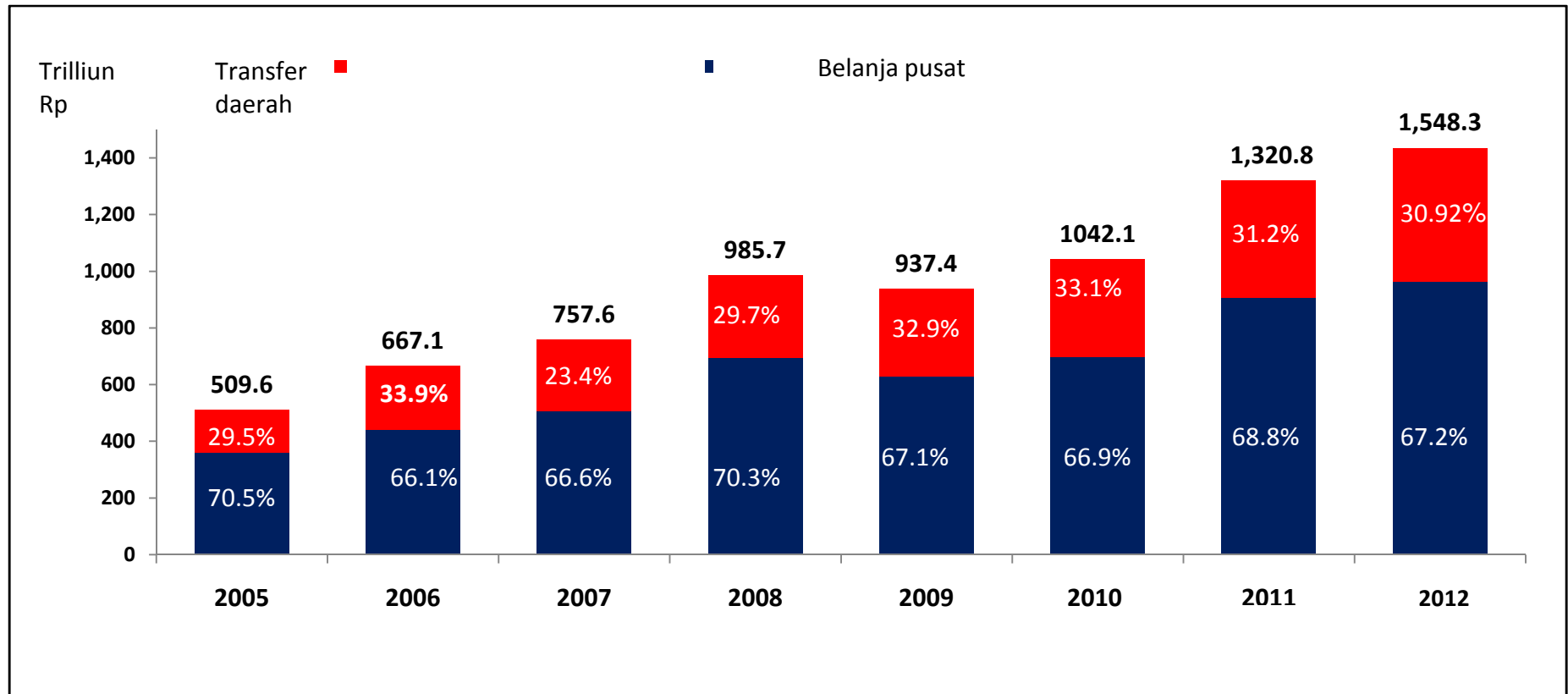
“Terus terang, saya tidak sempat mikirin kepentingan NKRI saat menerbitkan Perda yang mengedepankan kepentingan rakyat saya”
(Bupati di daerah kaya minyak tapi miskin rakyatnya, 2014)



“It was a decentralization under distrust that we had during reformasi”

(Dewi Fortuna Anwar, 4 September 2012 at HDCA Cross-Country Roundtable and Policy Dialogue)

OTONOMI DAERAH MENTRANSFER 1/3 APBN KE DAERAH



- ❑ Rata-rata APBN meningkat 17 % selama 2005-2012.
- ❑ Proporsi belanja pusat selama 2005-2012 cenderung menurun (70,5% → 67,2%), sementara transfer daerah meningkat (**29,5% → 30,9%**).

Source: Brodjonegoro (2012), Head of Fiscal Policy Office, on Cross-Country Policy Dialogue, held by UKP4-HDCA, 4 September 2012)

JOKOWI DAN POLITIK ANGGARAN

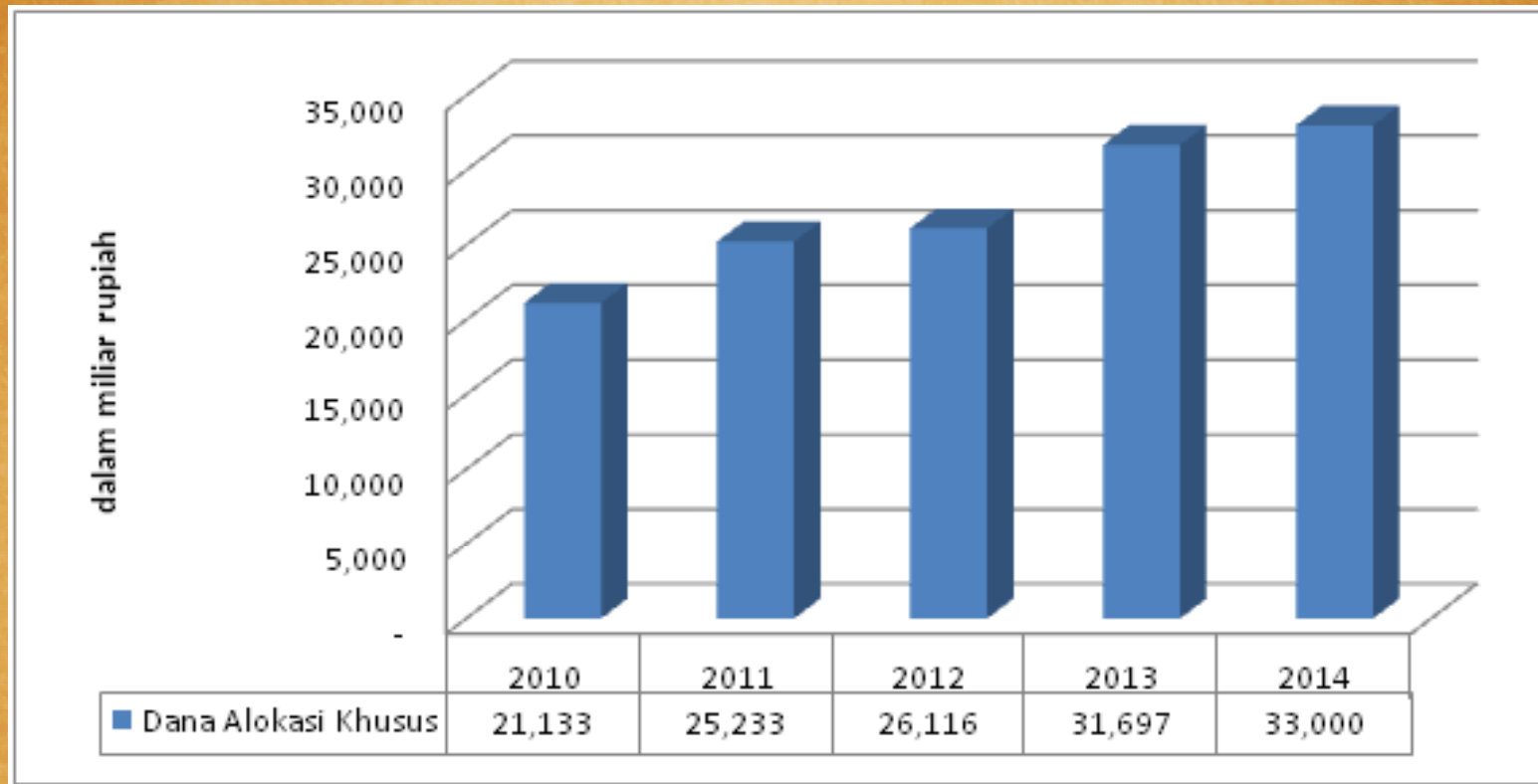


“Dengan politik anggaran, kita (pemerintah pusat) bisa mengontrol Pemda. 85% APBD berasal dari pusat”

“Gunakan insentif dan sanksi, misalkan dengan Dana Alokasi Khusus (DAK)”

(Joko Widodo, Debat Capres 9 Juni 2014)

MENYELARASKAN PEMDA MELALUI DAK ?



- ☐ **Trend DAK meningkat**, mencapai Rp. 33 Triliun di 2014.
- ☐ DAK ditujukan pada sektor yang penting bagi **kesejahteraan rakyat - kesehatan, pendidikan, infrastruktur**.
- ☐ "Menghukum" Bupati/Walikota, atau "**menghukum**" rakyat?

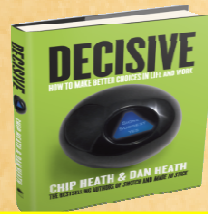
DAYA SAING INDONESIA –GOING FORWARD



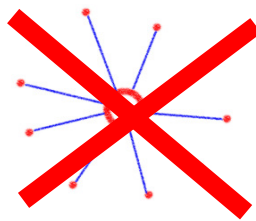
Lesson 1: PARTICIPATIVE, NOT AUTHORITATIVE
Leadership by example and action



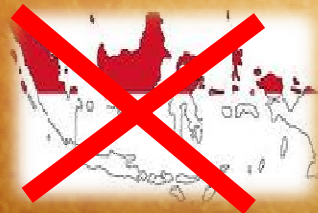
Lesson 2: DEVIL IN THE DETAIL
Big vision matters, but solid execution determines



Lesson 3: COORDINATION MUST BRING DECISION
Coordination not only by Menko, but PIC



Lesson 4: LOCAL, NOT JUST CENTRAL
Pay attention and deal with the local government



Lesson 5: GO GLOBAL, NOT JUST NATIONAL
Challenge to keep Indonesia's global relevance



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INSTITUT TEKNOLOGI BANDUNG



UNIT KERJA PRESIDEN
Bidang Pengawasan dan Pengendalian
Pembangunan

TERIMA KASIH

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