



Kementerian PPN/
Bappenas



Scene-Setting: **Special Economic Zone- Investor Session**

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Bali has a Strategic Geographical Location



- ❑ Bali is Close to Australia
- ❑ Bali is located Between **International shipping Routes**

Bali Island has great potential in the tourism sector:



- Natural Beauty, Rich Cultural Heritage, Adventure Activities, Relaxing environment & Wellness, Hospitality of local people



The Balinese people are intellectual human resource, known for their high quality, integrity, and rich cultural values.

- Bali has the **5th highest HDI** value in Indonesia

Bali has Good Quality of Infrastructure:



- The quality of roads is relatively good (43.33% good, 31.31% moderate)
- Individual access to mobile-phones is high (73.20%)
- I Gusti Ngurah Rai Bali Airport served 37 international routes in 2023, will increase foreign tourist visits

The agro, fisheries, and creative economy sectors can support Bali's tourism:

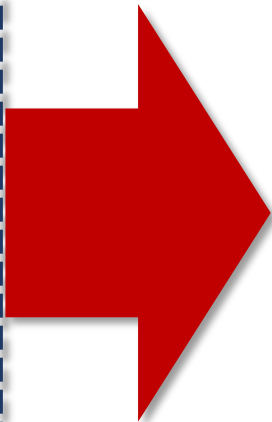


- Bali has high potential in the fisheries and marine sector for export (driven by its vast sea areas and coastline)
- Its creative economy export = 1.45% of the export value of the national creative economy (2019)
- The agro-industry and creative industry have close links with the primary sector and the tourism.



ROADMAP OF BALI "KERTHI" ECONOMY

being adapted in Long-Term
National Development Plan and Medium-
Term National Development Plan



Supporting
Bali Economic Transformation
NEW ERA OF BALI:
GREEN, PRODUCTIVE, PROSPEROUS

TARGET 2045...

Economic Growth
Average 2022 - 2045
7,4%



GRDP per Capita
Increase
8x from 2020

6 Bali Economic Transformation Strategy



Bali Smart
and Healthy



Productive
Bali



Green Bali



Integrated Bali



Bali
Smart Island



Conducive Bali



How to create a more- value added and value-creation to Bali Economy?

Productive Bali

- Labor Productivity towards Middle Class Workers
- Modernization of Agriculture towards Organic Bali
- High Value Added & Export Oriented Green Industry
- Quality and Sustainable Tourism
- Competitive Creative Economy with a Broad Market
- Resilient and Export-Oriented MSME Ecosystem



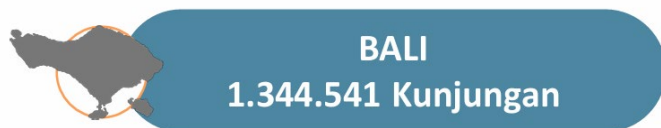


Quality and Sustainable Tourism

Average length of
Stay (foreign tourist)
in Bali:

3.14 days

Jan-Mar 2024



44.35% of foreign
visitors come through Bali

Increasing length of stay
Increasing tourism spending

Programs:

- Infrastructure Development
- Improving tourism destination
- **Diversification of Tourism products**

With: USD 1400 spending per week









SEZ Sanur



- 1 **Collaboration with International Health Brands**
- 2 **Involvement of Foreign Health Workers**
- 3 **International standard Health Technology**
- 4 **Providing a unique and complete Patient Journey**

Source: Deloitte Analysis and Public Information

Bali's Leading Creative Economy Sub-sectors




		STRATEGIC ISSUES						
		Decreasing Demand	HR Competence	HR Scarcity	Lack of Product Diversification	Product Quality (Certification, Packaging, Branding)	Digital Adoption Inertia	Market Expansion Inertia
<div>  <div>Fashion</div> </div>								
	<div>  <div>Culinary</div> </div>							
	<div>  <div>Craft</div> </div>							
	<div>  <div>Performing Arts</div> </div>							
	<div>  <div>Photography</div> </div>							
	<div>  <div>Film, Video, Animation</div> </div>							
	<div>  <div>Application Development</div> </div>							
	<div>  <div>Game Development</div> </div>							

Source: Bappenas (2021)






Data on Creative Economy in Bali

TOP 3 SUBSECTOR CREATIVE ECONOMIC

1.  Music 26,26%
2.  Art Performance 12,64%
3.  Culinary 8,29%

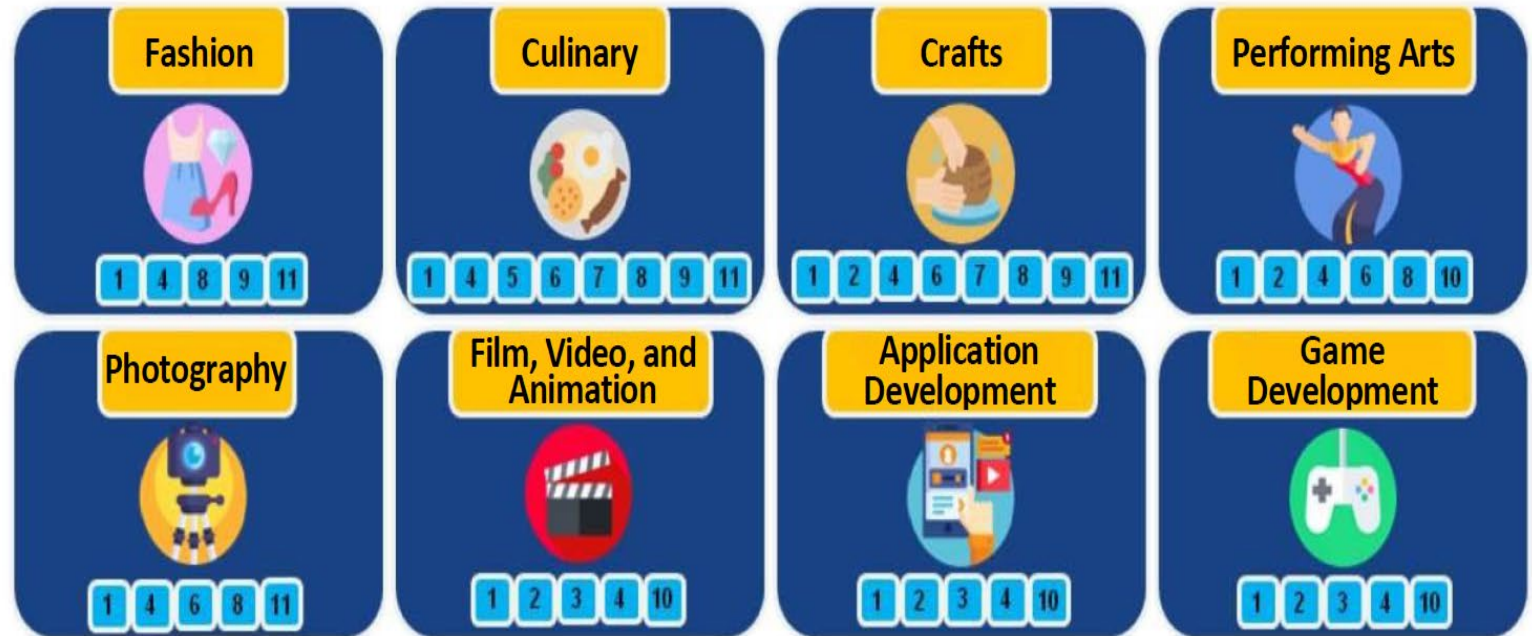
Other Subsectors: 52,81%

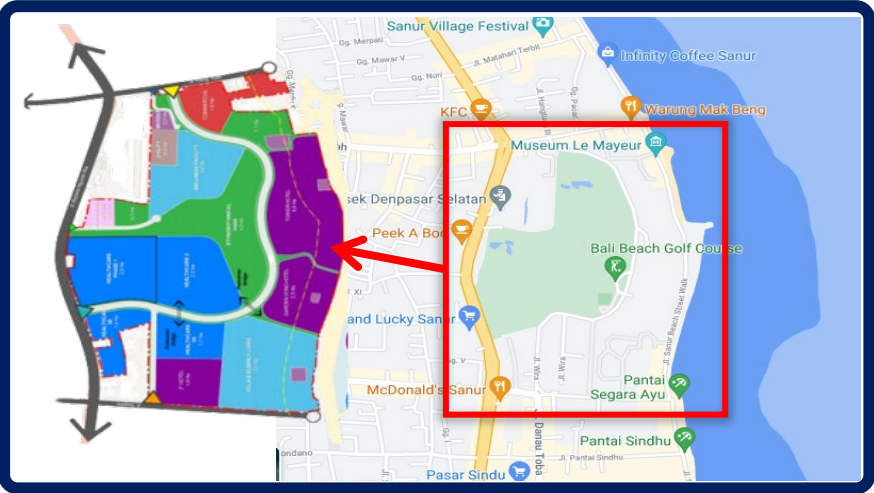
TOP 3 CITY/DISTRICT

1.  Denpasar City 51,6%
2.  Badung District 22,2%
3.  Gianyar District 10,9%

Other cities or districts: 15,29%

Priority Sectors of Creative Economy in Bali for Bali Kerthi Economy











1 Collaboration with International Health Brands

2 Involvement of Foreign Health Workers






3 International standard Health Technology

4 Providing a unique and complete Patient Journey

CoE Plan in Health Tourism SEZ

-  **Cardiology**
-  **Oncology**
-  **Neurology**
-  **Gastro-Hepatology**
-  **Orthopedic**
-  **Medical Check-Up**

MAIN HOSPITAL

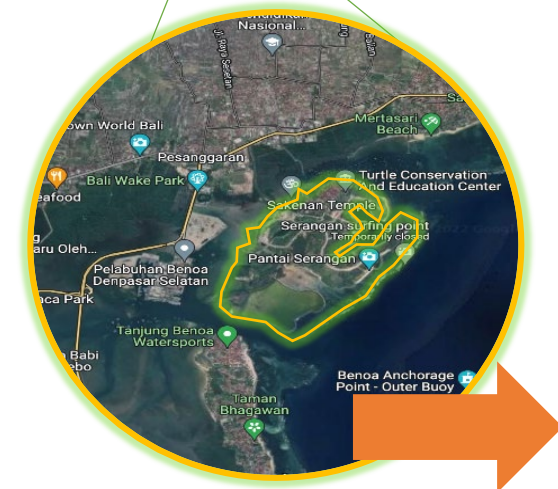
-  Fertility
-  Stem Cell & Tissue Bank
-  Aesthetic /Plastic surgery
-  Geriatric
-  Oriental/ Alternative Medicine

SPECIALIST HOSPITAL

Bali Turtles – Has Been Designated as Tourism and Creative Economy SEZ with PP No.43/2023

On January 13, 2023

- **Kura-Kura Bali was designated as a Special Economic Zone by the National KEK Council and the Coordinating Minister for Economic Affairs.**
- Aiming to secure foreign exchange reserves of USD 31.8 billion and enhance the quality of tourism in Indonesia, particularly in Bali.



Bali Turtles

PT Bali Turtle Island Development's contribution to the 500 hectares of land for Bali, includes a **Tech Park** with the target of developing 50,000 data scientists so that they can support **Bali's industry and tourism.**

Key Points to Discuss in this Plenary Session

The development of Sanur and Kura Kura Bali as the Special Economic Zones are aligned with strategic transformation effort for value-creation industries and services for Bali



In this panel session, we hope to gain insight into the following important issues:



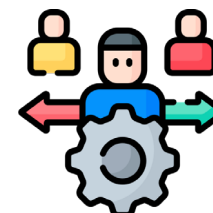
Learn from experience in terms of **insights and lessons learned from investors** and other stakeholders interested in entering SEZs.



Best practices and lesson learned for **successful investment** in Special Economic Zones



The advantage and specific benefits offered by Kura-Kura Bali/ Sanur Special Economic Zone compared to other regions



Key considerations that investors should take into account when **evaluating the suitability** of a particular SEZ for their investment strategy



Successful case studies for investors who have utilized the benefits of SEZs, and insights into future investment decisions and strategies



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Thank you

