TransPORTing Light to the Nation

Jakarta, 10 Desember 2015

Indonesia's Maritime Logistic Panel Discussion

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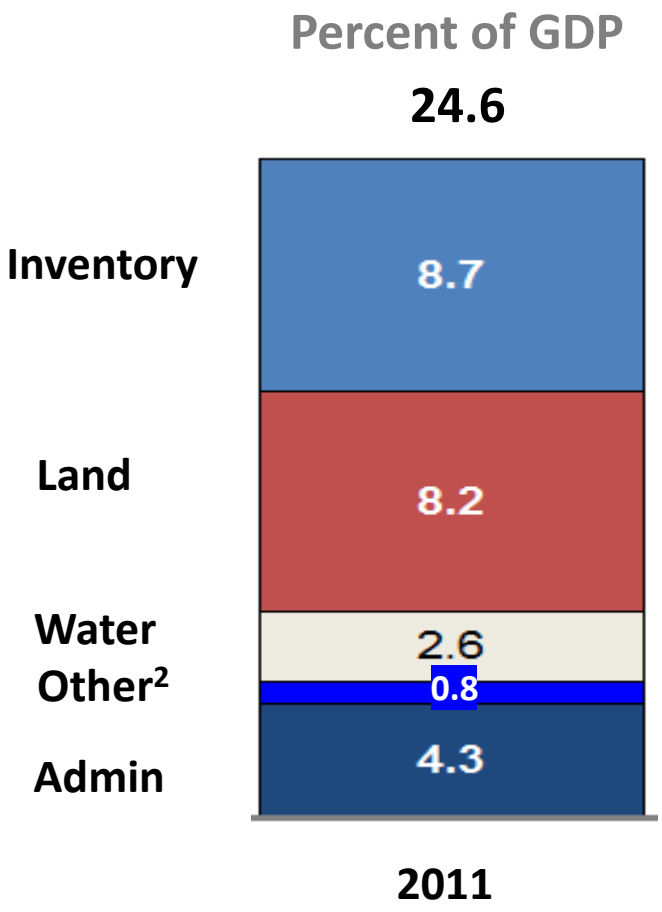
Direktur Utama
PT. Pelabuhan Indonesia II (Persero)

INDONESIA LOGISTIC COST



SOURCE: Transportation Costs and International Trade in the Second Era of Globalization By Hummels (2007), Indii North Java Multimodal Transport Study, State of Logistics Indonesia 2013, Cass Information System, NPMP, expert interviews, team analysis

Nearly 5% of GDP can be saved by decreasing the country's total cost of logistics

Indonesia's total logistic costs can come down from 24.6% of GDP to 19.8%

Potential reduction of Indonesian logistic costs[1]

Percent of GDP

Inventory
Impact from speeding up supply chain and increasing reliability

Maritime-related Land
Trucking cost reduction
Land-to-sea substitution

Water
Lower direct costs, increased containerization and Land-to-sea substitution

Admin
Decrease due to savings in transportation and inventory

Total impact on GDP
Percent

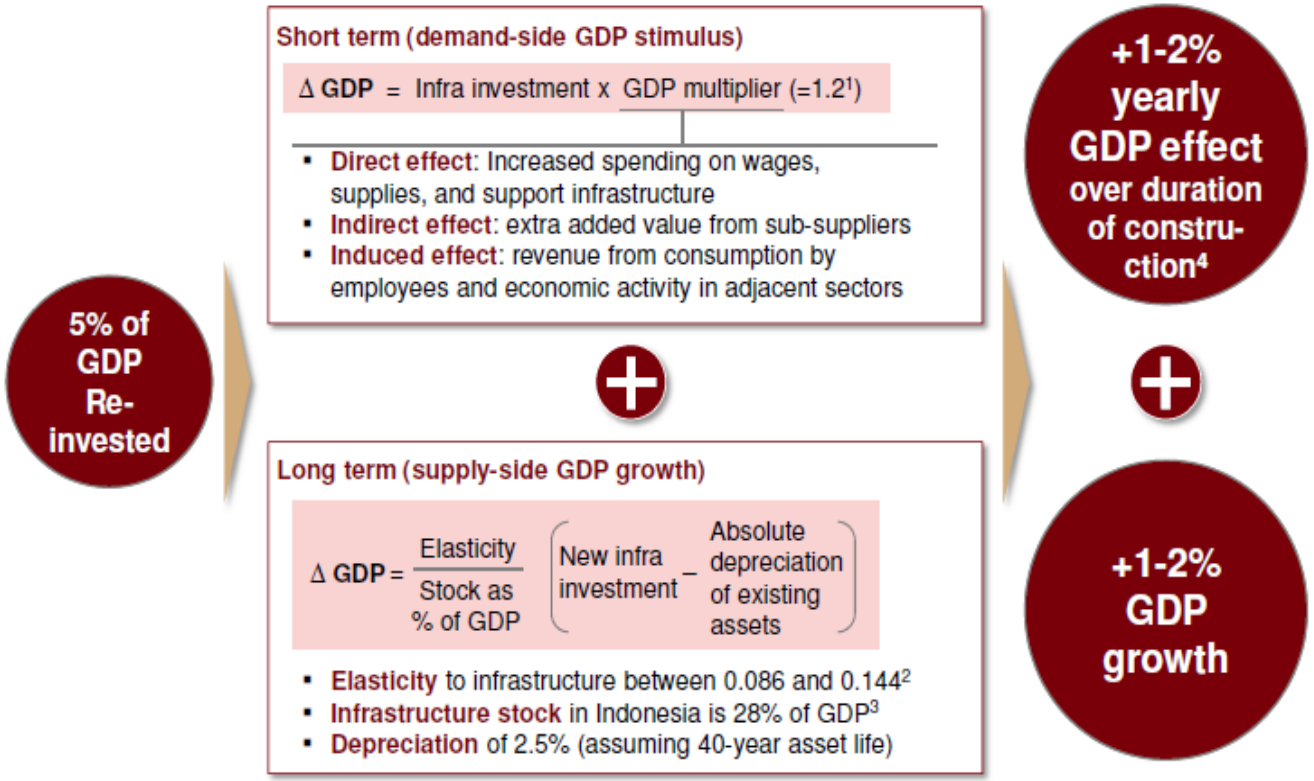
1 Savings assigned to each category based on weighted average of savings contribution to GDP of signature products on an overall GDP impact of 2.26%; Note that Warehousing and administration savings partly allocated to Land and water proportionally; 2 Air, Rail, and Services;

SOURCE: Transportation Costs and International Trade in the Second Era of Globalization By Hummels (2007), Indii North Java Multimodal Transport Study, State of Logistics Indonesia 2013, Cass Information System, NPMP, expert interviews, team analysis

INDONESIA PERSPECTIVE – SIZE OF THE PRIZE

PRELIMINARY AND CONFIDENTIAL

Re-investing the proceeds into infrastructure could result in additional yearly effect of >2% GDP growth during construction (>1% in the long-term)



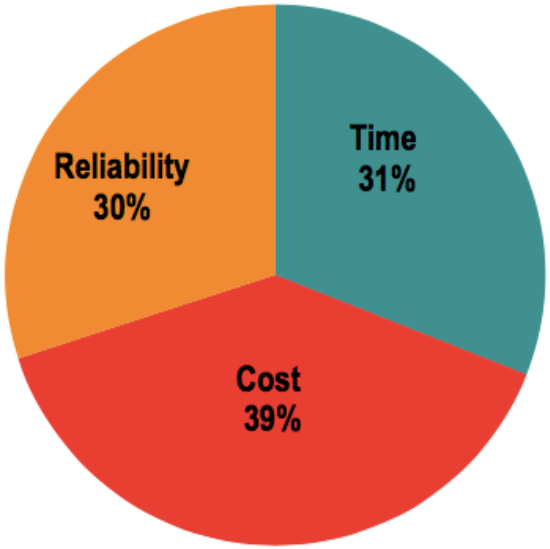
1 Indonesia-specific multiplier obtained from World-Input Database, derived from an input-output model, which is an advanced quantitative economic technique that represents the linkages between branches of the national economy (output of one industry is an input to each other industry in a linear model)
2 Low and high elasticity estimates from Bom, P. and J. Ligthart (2009): "How productive is public capital? A meta-regression analysis"
3 Based on historical expenditure and using the perpetual inventory method for 2012.; transport infrastructure stock is understated, as expenditure for rail, ports, and airports is not available.
4 This would be spread over the duration of construction – e.g. assuming 3-5 years average, the yearly effect would be 1.2-2%

SOURCE: World Input Output Database, McKinsey Global Institute analysis, team analysis

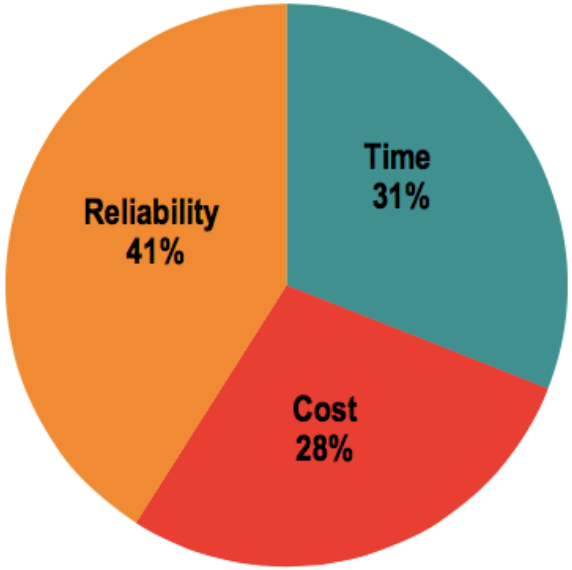
CHALLENGES

Producer care more about Reliability than Cost of Logistic

Survey results for LSPs

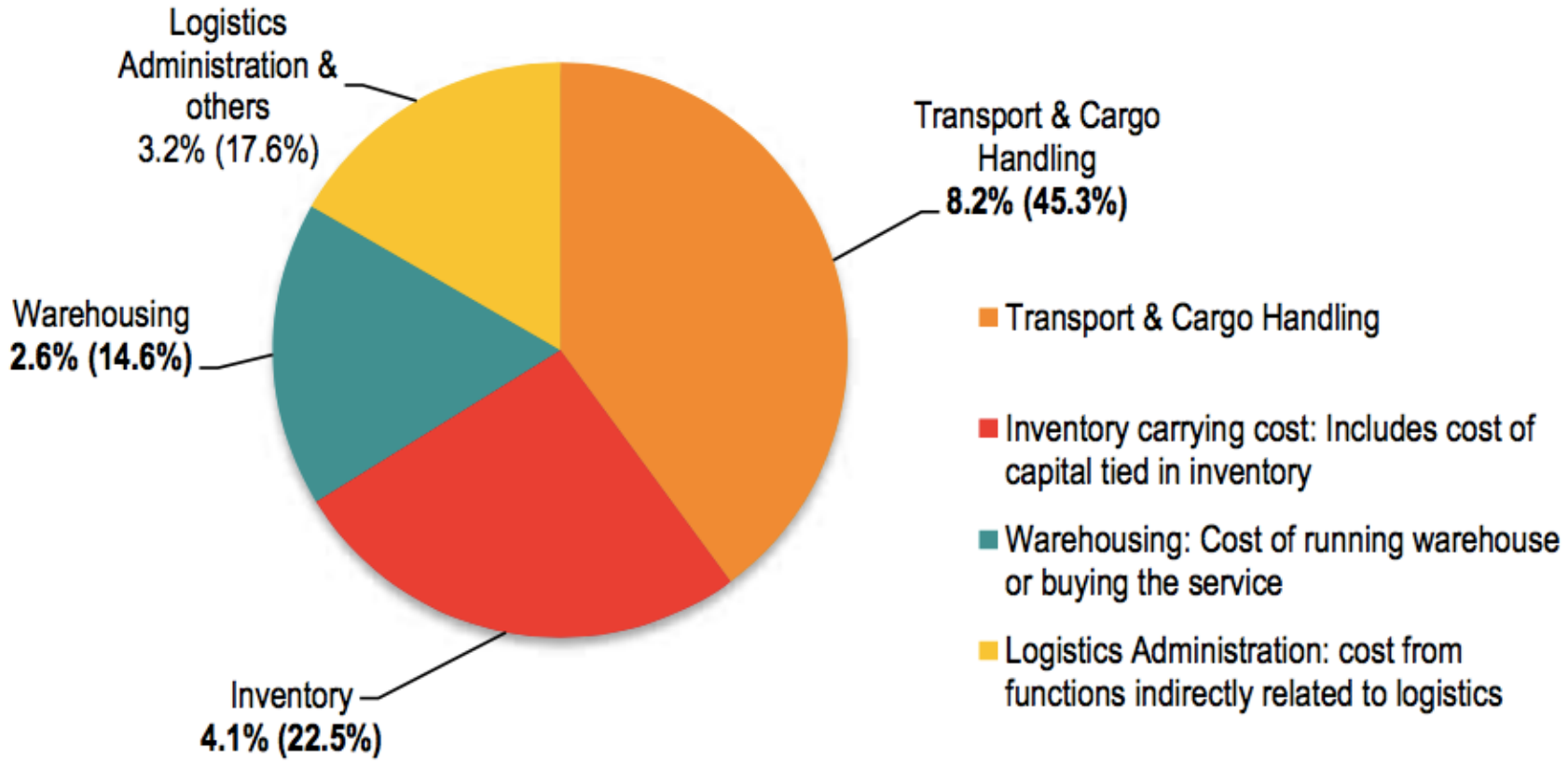


Survey results for Manufacturers



Source: World Bank and LPEM-FEUI survey in 5 cities in Indonesia, 2014.

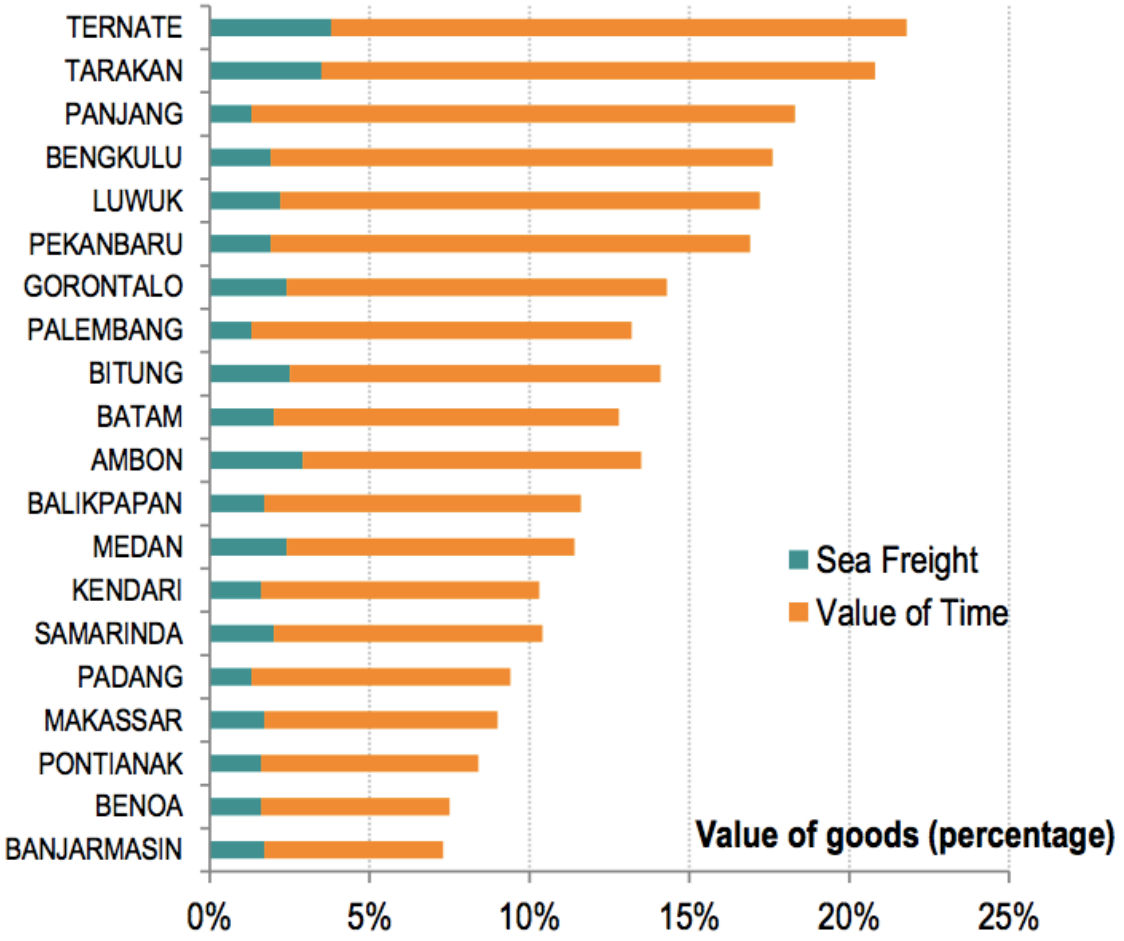
Transport cost only 45.3% of Logistic Cost



Source: World Bank and LPEM-FEUI survey in 5 cities in Indonesia, 2014.

[5] Other countries that use logistics costs/sales include Japan, Finland, France and Germany.

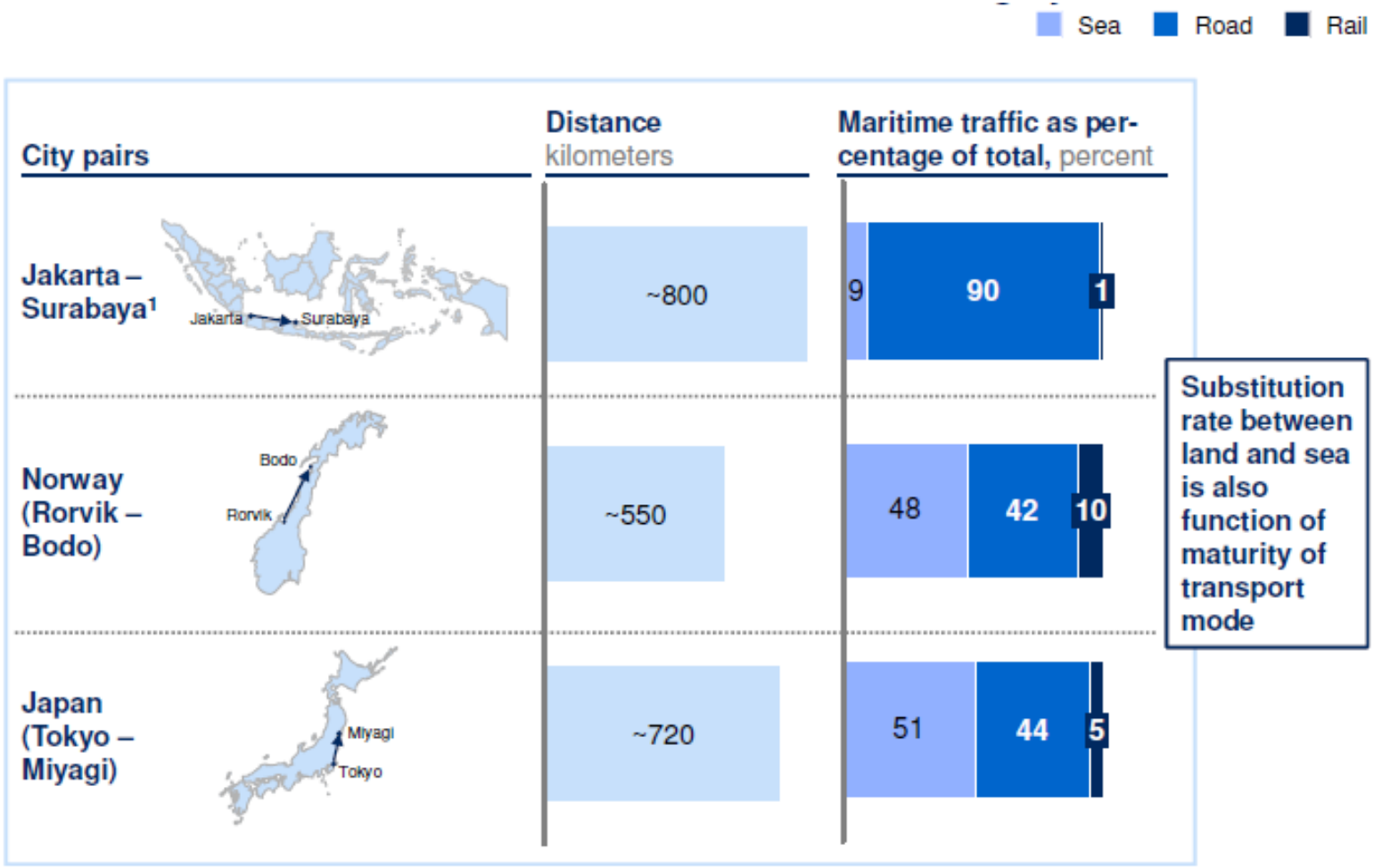
Sea freight cost MAX 6% of the Value of Goods



Source: World Bank staff estimates, 2014.

The Challenge Today

Other coastal transport examples



1 Rail traffic derived from Railway MasterPlan, Maritime traffic derived from total container traffic assuming FCL (24T)

SOURCE: Indii, Konkurranseflater i godstransport of intermodale transporter, Multimodal transport strategy: Java Corridor, MLIT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Banda Aceh
Lhokseumawe
Langsa
Medan
Binjai
Tebingtinggi
KUALA LUMPUR
Kelang
Strait of Malacca
Seremb.
Malacca
Simeulue
Sinabang
Tarutung
Sibolga
Padangsidempuan
Gunungsitoli
Nias
Telukdalam
Rantauprapat
Tanjungbalai
Labuhanbilik
Bagansiapiapi
Rupat
Dumai
Bengkalis
SINGAPORE
Padang
Rangsang
Rantau
Batam
Pekanbaru
Kepulauan Ria.
EQUATOR
Pini
Tanahmasa
Pulau-Pulau Batu
Bukittinggi
Payakumbuh
Kepulauan Lingga
Singkep
Rengar
Sawahlunto
Solok
Padang
Selat Berhala
Jambi
Siberut
Muaisiberut
Selat Mentawai
Sungaipenuh
Belinyu
Mentok
Pangkalpinang
Bangka
Selat Rangka
Koba
Toboali
Selat Gaspar
Sipura
Pagai Utara
Pagai Selatan
Palembang
Perabumulih
Bengkulu
Kotabumi
Bandarlampung
Telubketung
Enggano
250 km
JAKARTA
Selat Sunda
INDIAN OCEAN
SUMATRA

Department of Public Works
Directorate General of Highways
Directorate of Planning

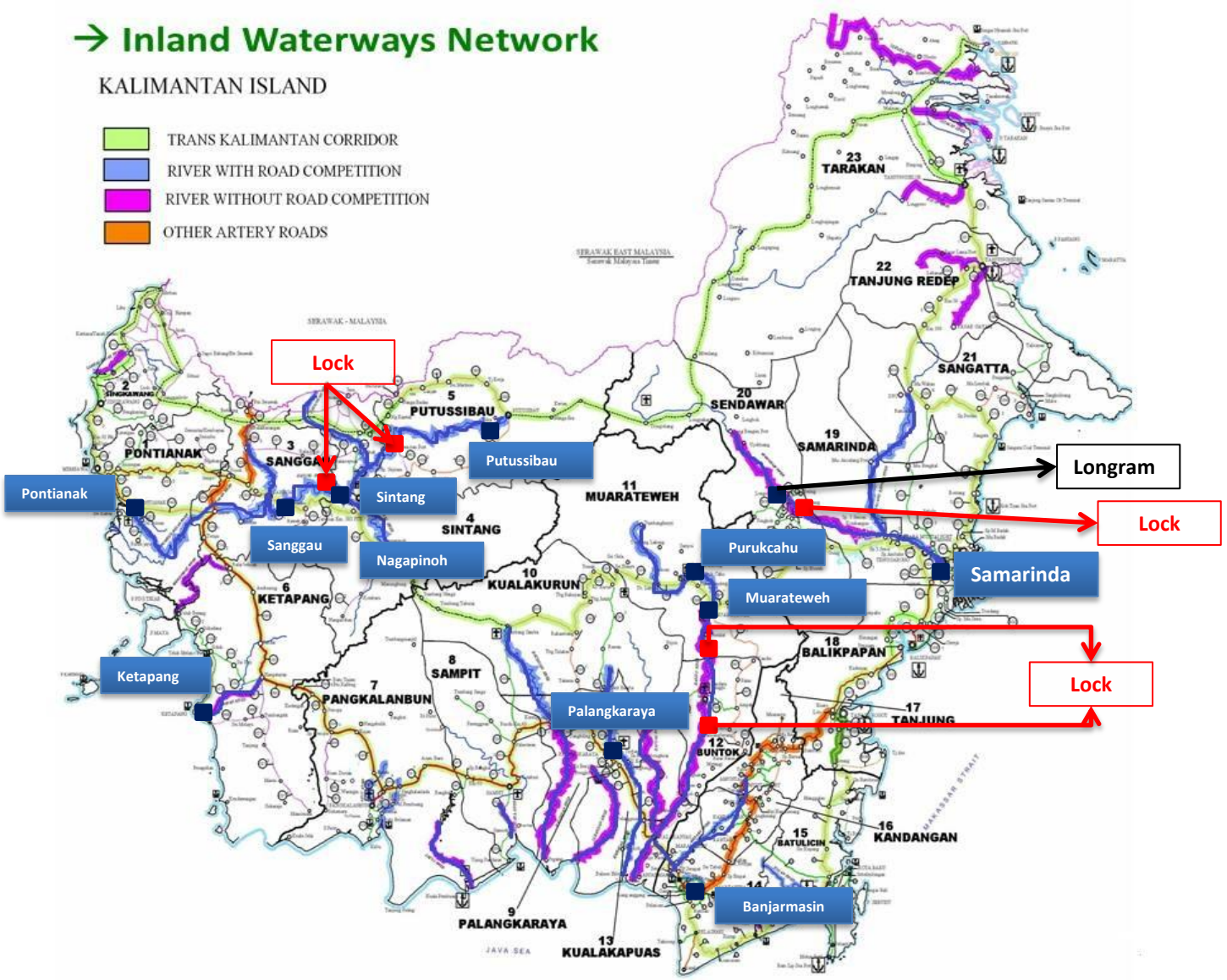
EASTERN INDONESIA REGION TRANSPORT PROJECT
(IBRD LOAN 4744 IND)

KALIMANTAN ROAD NETWORK
DEVELOPMENT STUDY

MIDTERM REPORT No 2

September 2007

BCEOM SOCIETE FRANÇAISE D'INGENIERIE
HI-WAY INDOTEK KONSULTAN
PT VIRAMA KARYA


Inland Waterways Network
KALIMANTAN ISLAND
TRANS KALIMANTAN CORRIDOR
RIVER WITH ROAD COMPETITION
RIVER WITHOUT ROAD COMPETITION
OTHER ARTERY ROADS
Lock
Pontianak
Sintang
Putussibau
Sanggau
Nagapinoh
Ketapang
Palangkaraya
Banjarmasin
Purukcahu
Muarateweh
Samarinda
Longram
Lock
Lock
1 PONTIANAK
2 SINGKAWANG
3 SANGGAU
4 SINTANG
5 PUTUSSIBAU
6 KETAPANG
7 PANGKALANBUN
8 SAMPIT
9 PALANGKARAYA
10 KUALAKURUN
11 MUARATEWEH
12 BUNTOK
13 KUALAKAPUAS
14
15 BATULICIN
16 KANDANGAN
17 TANJUNG
18 BALIKPAPAN
19 SAMARINDA
20 SENDAWAR
21 SANGATTA
22 TANJUNG REDEP
23 TARAKAN
SERAWAK - MALAYSIA
JAVA SEA


LAUT SULAWESI
PROPINSI SULAWESI UTARA
PROPINSI GORONTALO
PROPINSI SULAWESI TENGAH
PROPINSI SULAWESI BARAT
PROPINSI SULAWESI SELATAN
PROPINSI SULAWESI TENGGARA
PROPINSI MALUKU
LAUT MALUKU
LAUT BANDA
LAUT FLORES
Tel. Tomini
Tel. Tolo
Selat Makassar
MANADO
GORONTALO
PALU
KENDARI
UJUNGPANDANG
SKALA 1 : 4.250.000
PROPINSI SULAWESI UTARA SEKALA 1 : 6.000.000
KETERANGAN

NETWORK 2012 – OPTIMIZED

If these issues were addressed today, the domestic network in the country would be significantly consolidated and result in lower sea voyage costs by 48%

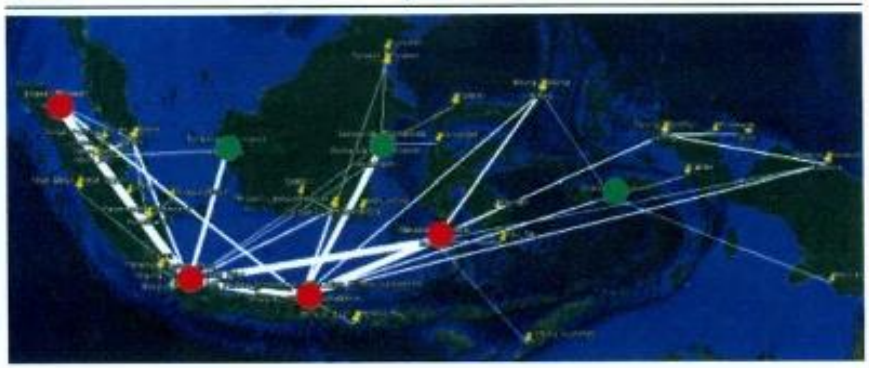
5,000TEU

Major ports

Major regional ports

2012 current network is point to point with 4 major hubs

Optimized network based on port performance aspirations and cost-minimization has transshipments and features sub-hubs



	Current network	Improved handling & Cost optimization
Trans-shipments	0%	11%
Vessel utilization	41%	67%
Number of vessels	274	121
Avg vessel size, TEU	~700	~1,500
Cost per TEU, USD	366	191

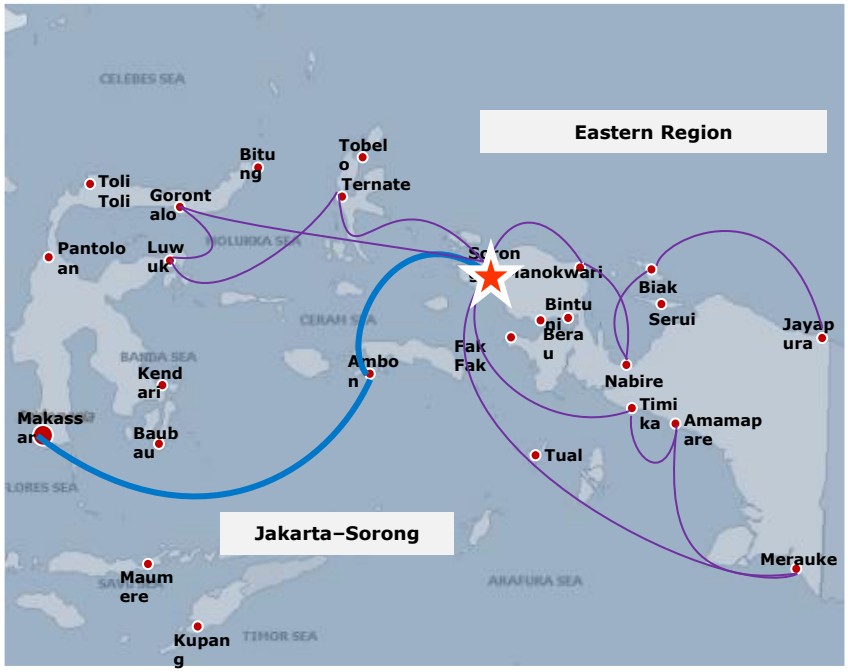
48%

SOURCE: MOT, Tg Priok O&D, World Fleet Register Report, Network model output, Team analysis

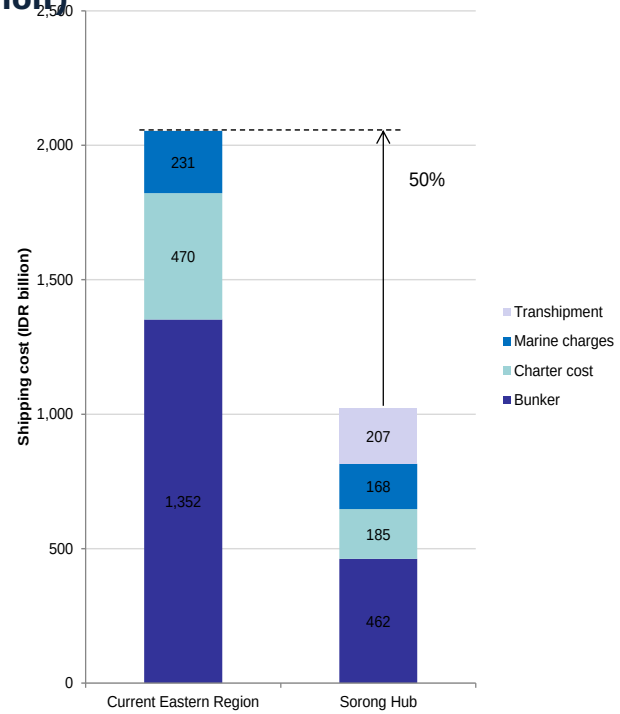
Sorong as a hub

- Market size of the transhipment hinterland are determined by container gateway volume handled at the feeder ports in the Eastern Region
- The feeder ports have infrastructure limitations, which provides the opportunity for shipping lines to use larger ships to tranship via Sorong, therefore saving liner network costs
- The market share that can be captured by Sorong will depend on a combination of factors including: Pricing, productivity and infrastructure. These will determine lines' approach to network strategy in the Eastern Region and the share moving by transhipment.

Sorong as Eastern Region hub



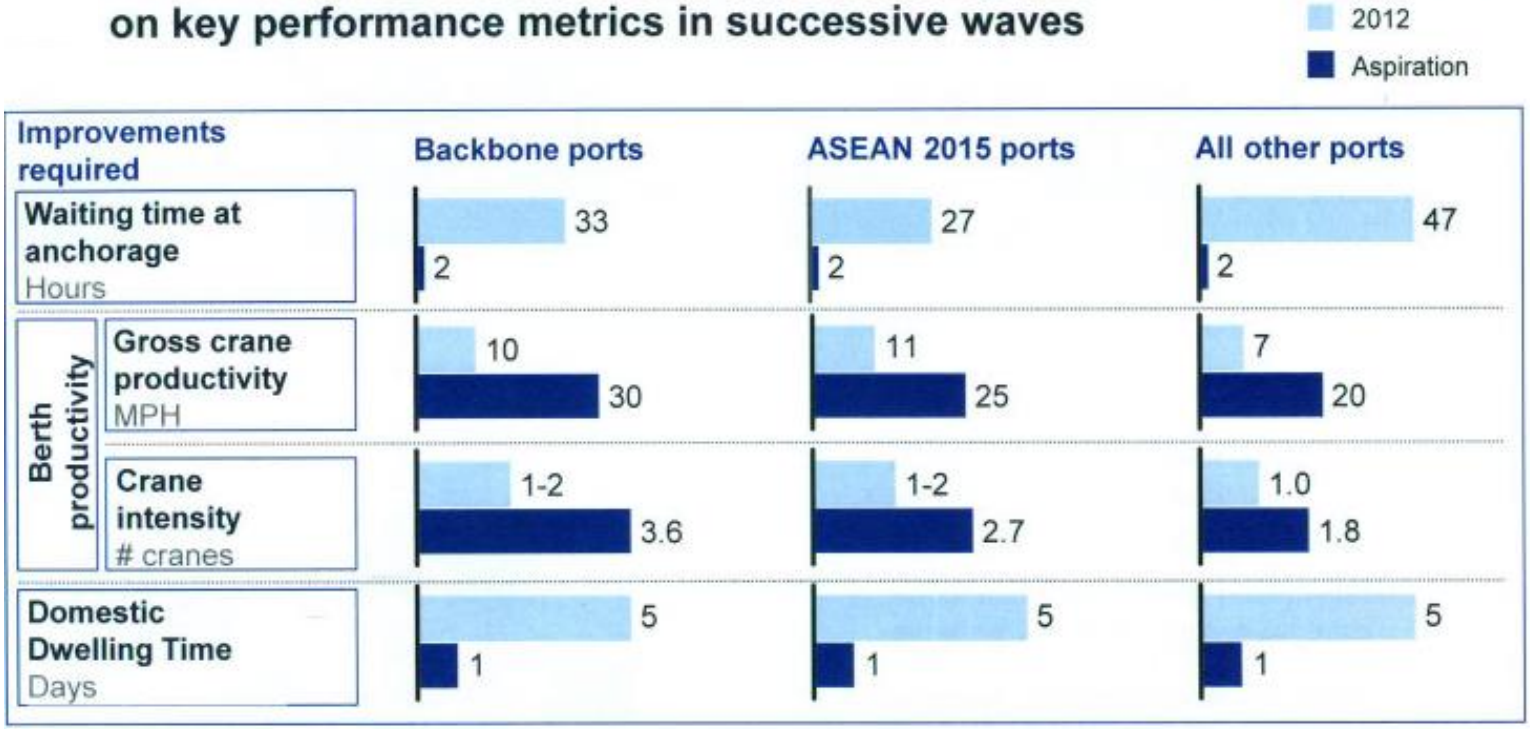
Liner network cost (Sorong hub vs. Current Eastern Region)



Source: Pendulum Study, Drewry Maritime Advisors

PORT SECTOR REFORM – OPERATIONS

The domestic port sector aspiration should be to reach best practices on key performance metrics in successive waves

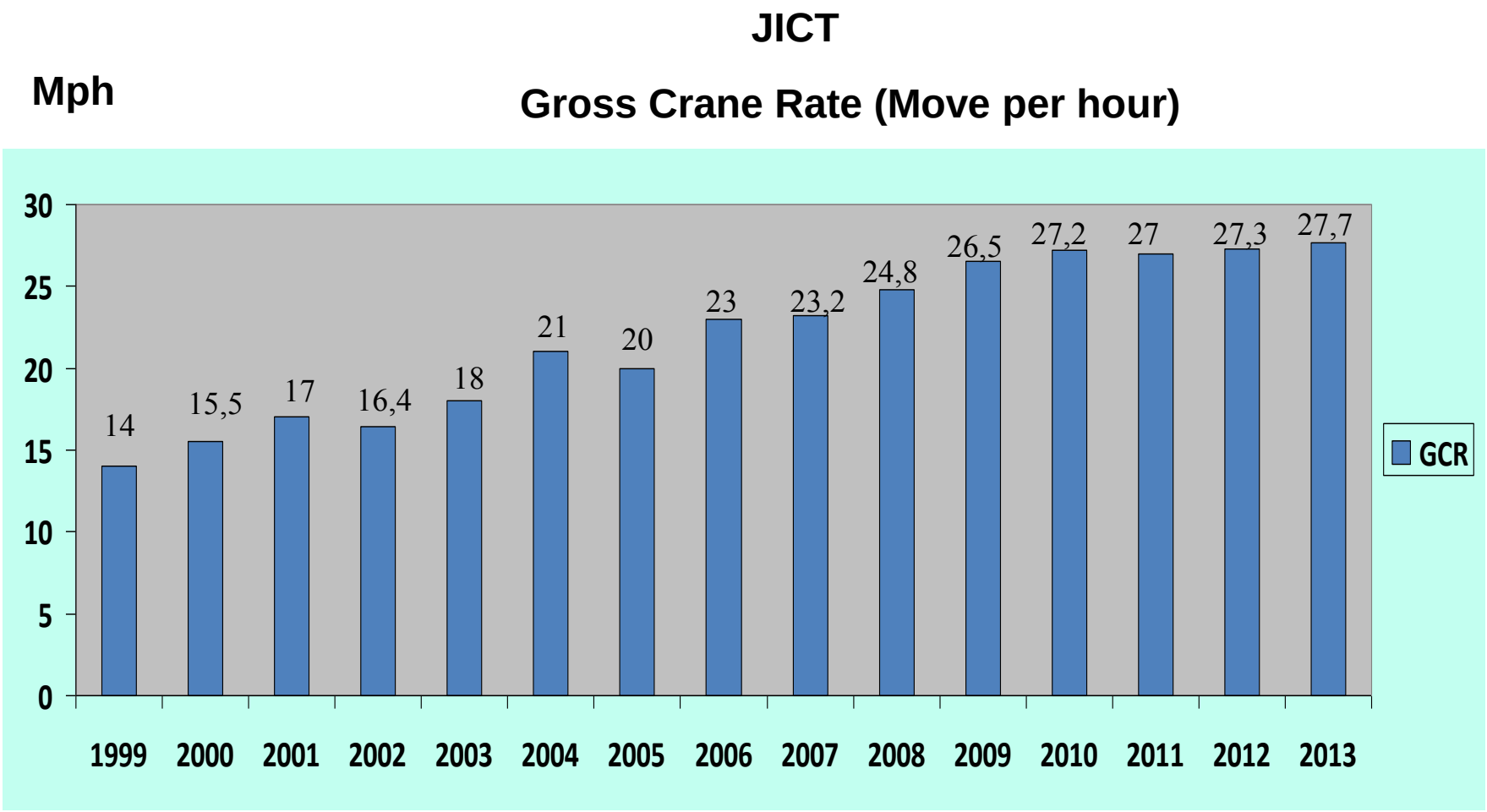


- **Launch "Survival toolkit program"** to enforce basic processes at all ports e.g. fixed berthing window, with productivity targeted to be increased by 30% in short time frame
- Continue improvement by launching more complete transformation, including implementation of **Performance Management System (TOS)**, first in Tg Priok then in other ports

1 Sorong, Bitung, Banjarmasin, Pontianak, Palembang, Jayapura, Balikpapan, Semarang, Panjang

SOURCE: Pelindo I, II, III, IV; Team analysis

Productivity History



Source : JICT

Domestic Shipping
65% di Pelabuhan
35% Berlayar

Seeing is believing

Why images hold the key to high impact communications

Seeing Is Believing

Life - Travel - Stories

Melihat Wajah Baru Pelabuhan Tanjung Priok

Katerina. S 10.50 Featured Jakarta Review

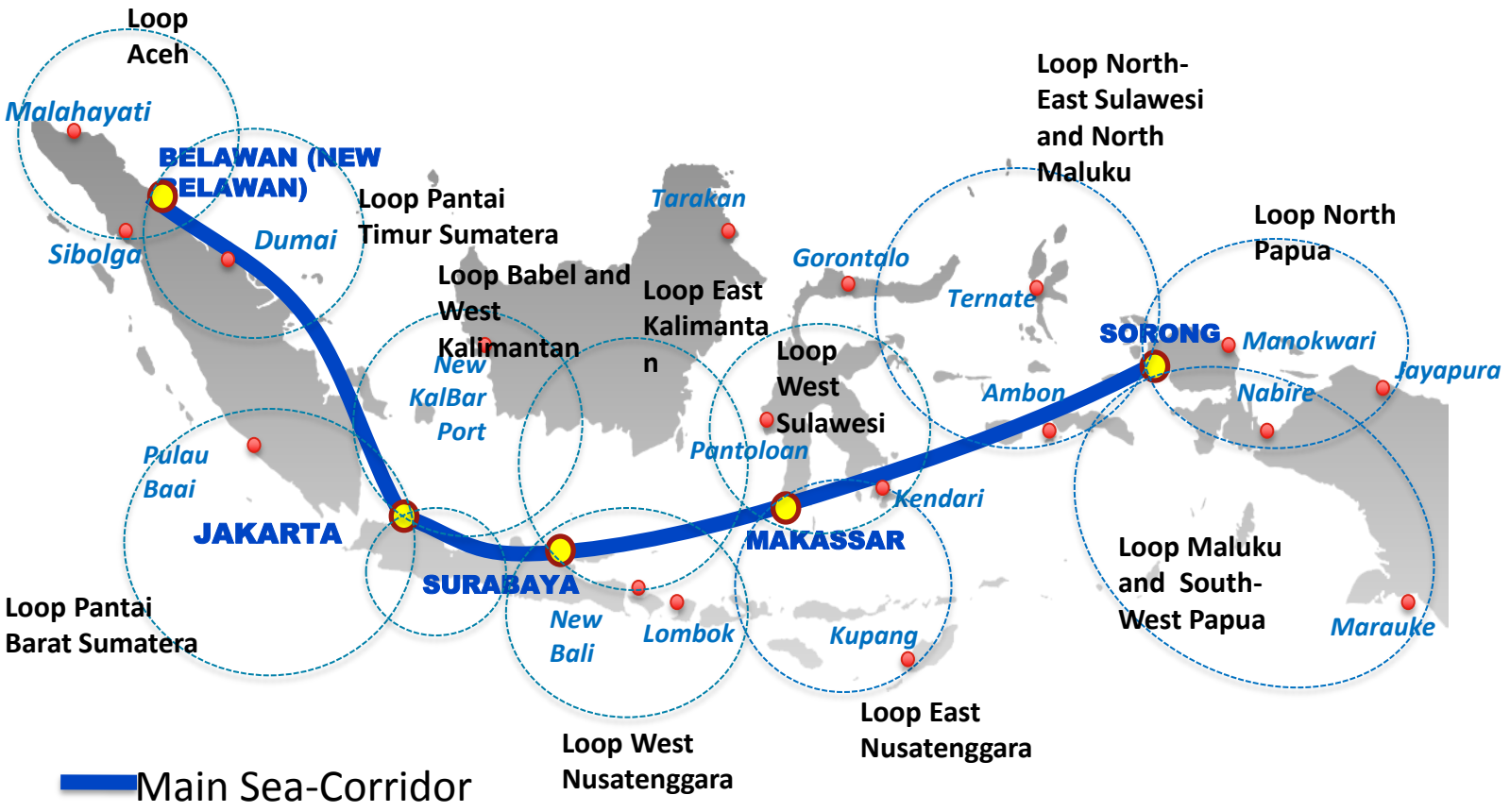
http://www.travelerien.com/2015/11/seeing-is-believing-tour-melihat-wajah.html

Ketika undangan tur Pelabuhan Tanjung Priok itu saya terima, seketika ingatan saya melayang ke periode tahun 2000 hingga 2010 silam, saat di mana saya masih meng-*handle* sebuah perusahaan yang bergerak dibidang perdagangan jasa dan barang (barang *industrial automation & control system*). Kala itu, kegiatan impor barang dari luar negeri seperti Jerman dan Italia menjadi hal yang tak pernah lepas dari keseharian perusahaan. Demi memenuhi kebutuhan akan mesin-mesin produksi (berikut *spare part*-nya) perusahaan-perusahaan raksasa, khususnya yang bergerak di industri *food & beverage* (*se*-Indonesia), perusahaan kami rutin mendatangkan barang dari luar negeri. Baik melalui udara (*airfreight*) maupun laut (*seafreight*). Nah, dari sanalah saya mengenal Tanjung Priok sebagai tempat berlabuhnya barang-barang yang kami impor. Meski tidak pernah terjun langsung ke lapangan menyaksikan fisik container yang datang dan dibongkar (karena sudah diurus oleh perusahaan jasa pengiriman langganan > *R****a Express*), tapi nama Tanjung Priok jadi sangat familiar bagi saya. Tentunya dengan cerita manis ataupun pahit. Contoh kejadian pahit yang paling saya ingat adalah ketika pelabuhan sedang *red light*, berton-ton barang di pelabuhan tertahan berminggu-minggu, bahkan pernah hampir dua bulan. Pernah proses *custom clearance* macet. Akibatnya *cost* membengkak, perusahaan jasa pengiriman rugi, kami juga, customer ngomel-ngomel. Masih untung PO tidak dibatalkan. Kalau iya, entah berapa rupiah nilai kerugian yang mesti dipikul. Pada kejadian-kejadian tertentu, saya ingat pernah mendengar cerita seorang staff yang mengecek langsung kondisi di lapangan. Sekali dan dua kali, ia bolak balik. Maka, dalam keadaan seperti itulah kemudian saya mendengar ceritanya tentang suasana pelabuhan. Macet, tidak bersahabat, kotor, tidak aman, tidak nyaman, dan bikin kapok. Ceritanya itu membuat benak saya tentang pelabuhan Tanjung Priok langsung tercemari. Apalagi saat menonton berita TV di musim mudik lebaran, pelabuhan Tanjung Priok terlihat sumpek dan menyesakkan. Semua itu, membuat saya beranggapan Tanjung Priok itu kumuh, jadul, dan kacau.

Woiiiii.....pelabuhannya ternyata aman! Tidak ada macet di gerbang-gerbang utama. Kendaraan berat pengangkut peti kemas memang padat, tapi melaju tertib. Tak ada yang berhenti. Tidak ada pedagang asongan. Tidak ada warung-warung kaki lima yang berjejalan di sekitar pelabuhan. Tidak ada keramaian yang dibayangkan. Gate-gatenya bagus. Tak ada kesan kumuh! Gedung-gedung kantornya modern. Lantai dan ruang-ruangannya kinclong bikin nyaman. Bahkan punya *function room* yang kece. Kemarin kami kumpul-kumpul di lantai 7 (kalo nggak salah yaa). Tempatnya punya view ke arah laut, tepat di hadapan pelabuhan yang rapi dan enak dilihat. Berasa sedang berada di istana Cihan Gulvinar (fans berat film CansuHazal wkwkw).

SEA TOLL PROGRAM

Sea Toll Program



Sumber: IPC (2012)

WHAT IS “SEA TOLL”??

WE BUILT SEA TRANSPORTATION SYSTEM

NOT ONLY “BANGUN PELABUHAN”

Program Tol Laut is The Holistic Maritime Logistics Reform and Development …

Human Resource Development

IPC Corporate University

What IPC do now and here...

... is providing you a center of excellence for Port, Maritime and Logistics education ...

... as a key soft infrastructure in succeeding Program Tol Laut

Source: IPC, PMLI

IPC has invested a lot to strengthen our Human Capital which will help support the IPC Corporate University …

176 people
Master Program overseas;

77 people Exec. MBA Program Overseas;

Master Program - Overseas

Region	University
Europe	Erasmus, KLU, IHE-DELFT, NMU, WMU, ITMMA
UK	Plymouth, Liverpool, Southampton, Newcastle
China	Shanghai Maritime Univ. Renmin Univ.
Australia	Victoria, Wollongong, Melbourne
USA	Oregon St Univ. Illinois inst. Tech. South Florida Univ.

Executive MBA - Overseas

Program	University
EMBA – Inhouse	IPC - Kuhne Logistic University
EMBA – Asia Pasific	National University of Singapore (entry 2013)
EMBA – Overseas	National University of Singapore – UCLA (entry 2013)
EMBA – Overseas	IMD Business School Switzerland (entry 2013)

15 advisors
from world-class company

~35 professional hired from best-in-sector company

Source: IPC

… and IPC is still continuing to strengthen our Human Capital through IPC Ph.D program

5 Ph.D candidates currently

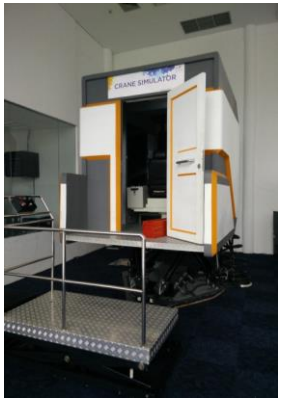
	Topics	University	Join year
1	**Port Economics**	CARDIFF UNIVERSITY	**2014**
2	**Port Planning**	UNESCO-IHE Institute for Water Education	**2015**
3	**Port and Shipping**	CARDIFF UNIVERSITY	**2016**
4	**Maritime Logistics**	ERASMUS UNIVERSITEIT ROTTERDAM	**2016**
5	**Port Logistics**	UNESCO-IHE Institute for Water Education	**2016**

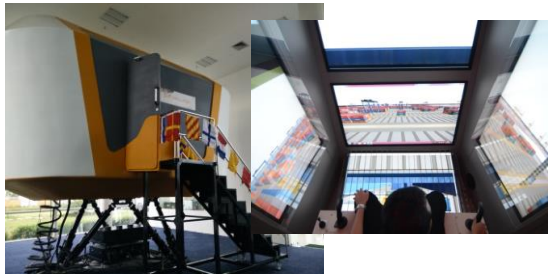
Source: IPC

IPC Corporate University has been equipped with world-class facilities (1/2)

IPC Corporate University has been equipped with world-class facilities (2/2)

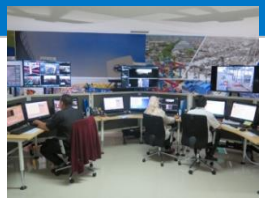
Crane and Ship Simulator





Simulator to train crane operator and ship pilot; aims to standardized the skills and fill the needs of new crane operator

Container Terminal Planning and Control Center

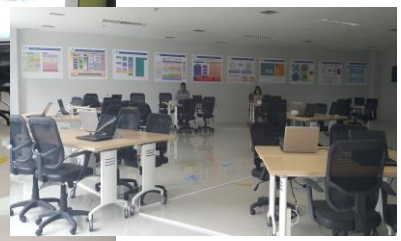


Labs to train planner and simulate Planning & Control activities as the command center of terminal operations

Port and Logistics Center

Integrated building to train and simulate warehouse ops. and management system, including 3PL system

ERP Learning Center



ERP labs to train IT-based business management system

Source: PMLI

Re-Modeling of Tanjung Priok Port

BEFORE

BEFORE

AFTER

AFTER

BEFORE

"ACCEPTED" NORMAL STANDART

DISORGANIZED OFFICE

BEFORE

BEFORE

AFTER

AFTER

AFTER

AFTER

BEFORE

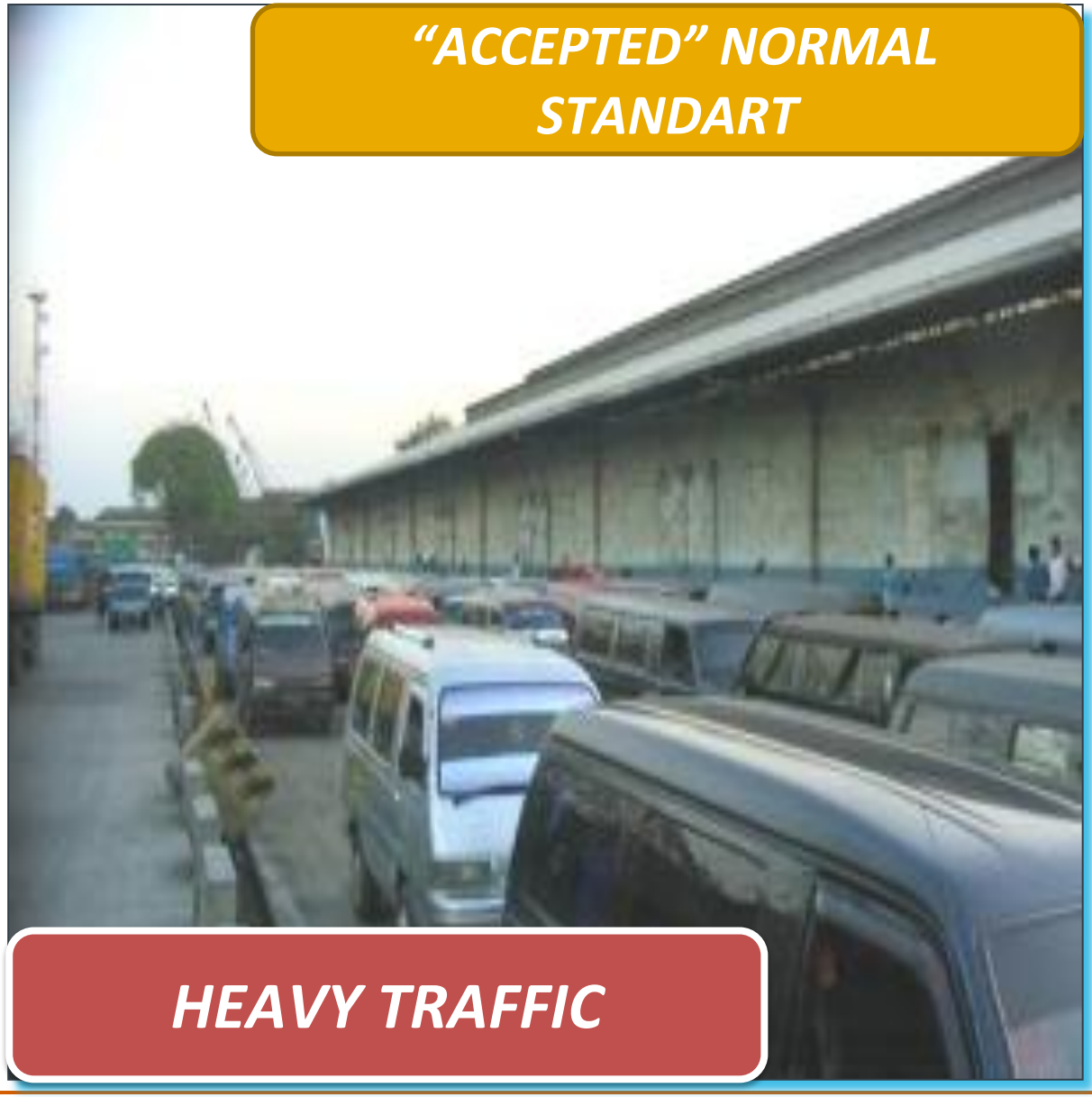
"ACCEPTED" NORMAL STANDART

DISORGANIZED PORT

BEFORE

BEFORE

BEFORE



BEFORE

"ACCEPTED" NORMAL STANDART

PEOPLE ARE SELLING GOODS INSIDE THE PORT

BEFORE

THE BIGGEST PORT IN INDONESIA

PORT WITHOUT EQUIPMENTS

"IT'S LIKE A PORT LOCATED AT THE EDGE OF THE WORLD"

AFTER

A DIFFERENT TANJUNG PRIOK: MODERNIZED EQUIPMENT

AFTER

CLEAN AND WELL-ORGANIZED TANJUNG PRIOK

AFTER

MODERN TANJUNG PRIOK

Luas Pelabuhan Tanjung Priok sekitar 600an hektare ini kini sudah jadi zero traffic!

AFTER

CLEAN AND GREEN TANJUNG PRIOK

Gedung IPC nan megah sudah kelihatan!

AFTER

MODERN EQUIPMENT

Di bawah Gantry Luffing Crane, alat penunjang stevedoring

AFTER

MODERN EQUIPMENT

Crane-crane keren di sepanjang dermaga

AFTER

MODERN PORT

Pelabuhan keren

AFTER

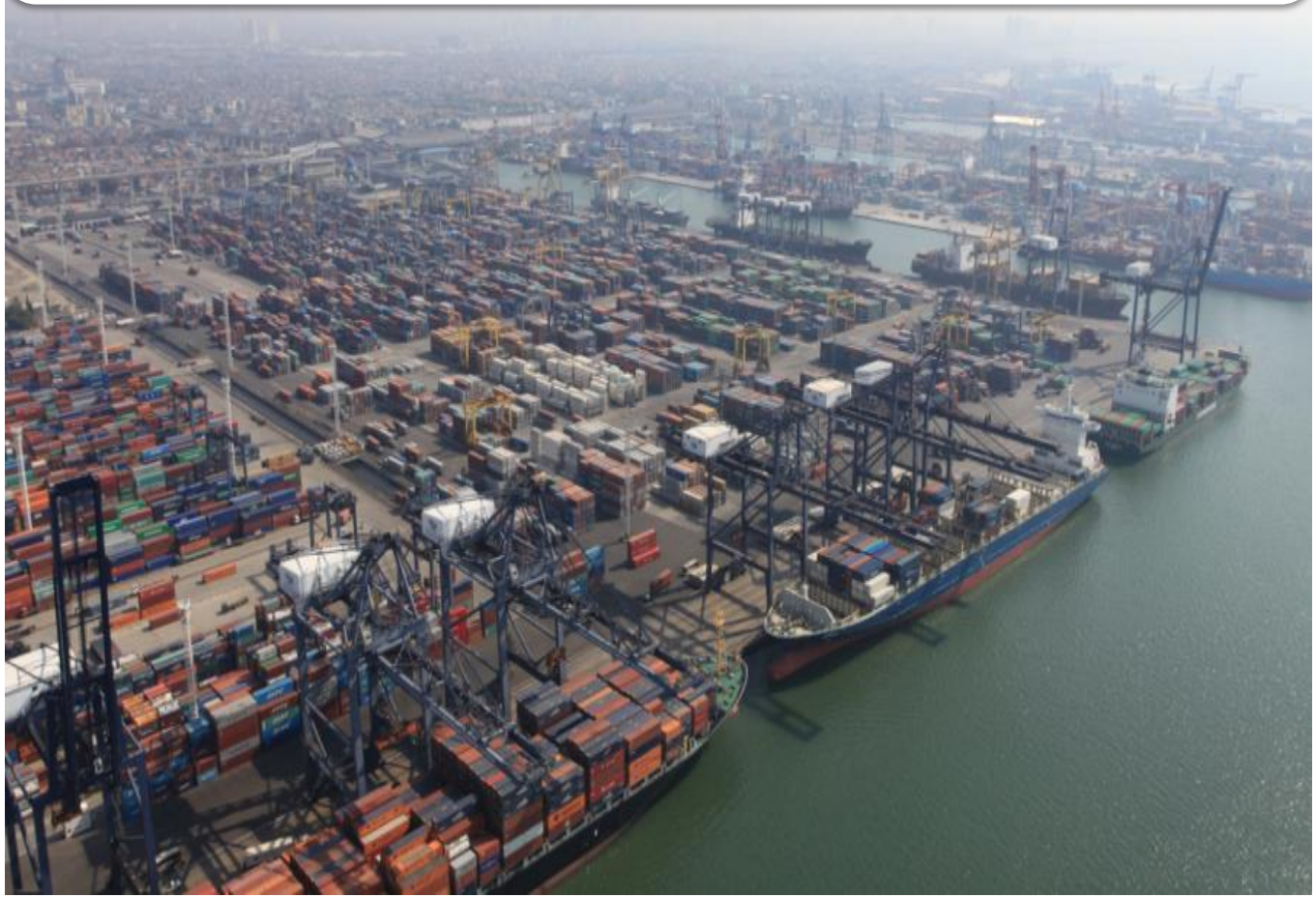
MODERN PORT

Crane bisa memindahkan 27 container per jam

AFTER

CONTAINER VOLUME TWO TIMES COMPARED TO 5 YEARS AGO BUT LESS CONGESTION

MODERN TANJUNG PRIOK WORLD CLASS TERMINAL



MODERN TANJUNG PRIOK

WORLD CLASS TERMINAL

WORLD CLASS TERMINAL

BEFORE

"ONE WAY TRAFFIC"

WIDTH : 150 M'
DEPTH : - 14.00 M

BEFORE

NARROW CHANNEL ,
SHIPS ARE PARKED WITHIN BREAK WATER

AFTER

"TWO WAY TRAFFIC",
NO SHIPS WITHIN THE BREAKWATER

WIDTH : 300 M'
DEPTH : - 16.00 M

BEFORE 2009

MAX 3.000 TEUS

AFTER 2013

MAX 5.500 TEUS

Re-Modelling Port of Panjang

BEFORE

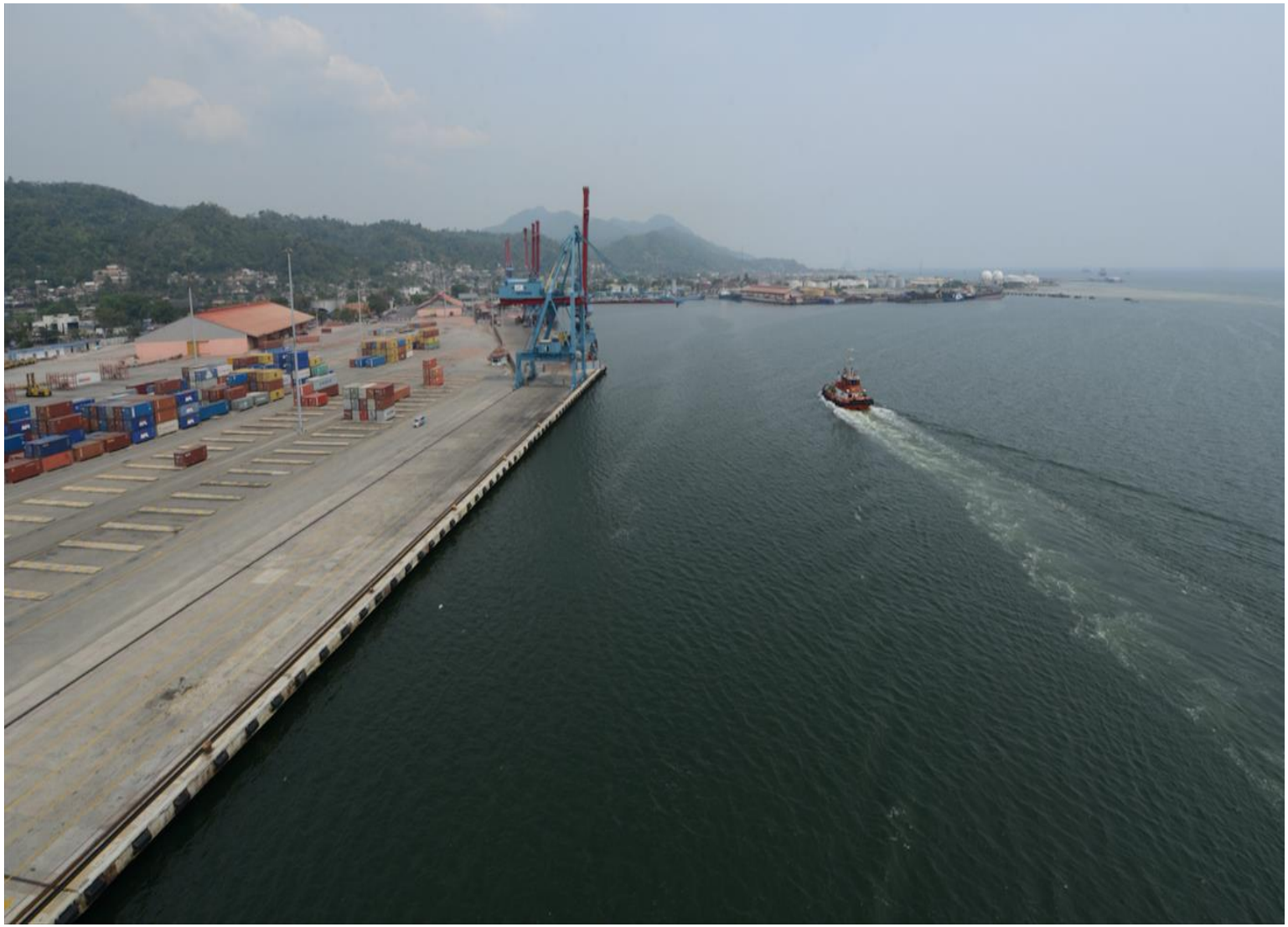
BEFORE

AFTER

AFTER

AFTER

AFTER



AFTER

Re-Modelling Port of Palembang

BEFORE

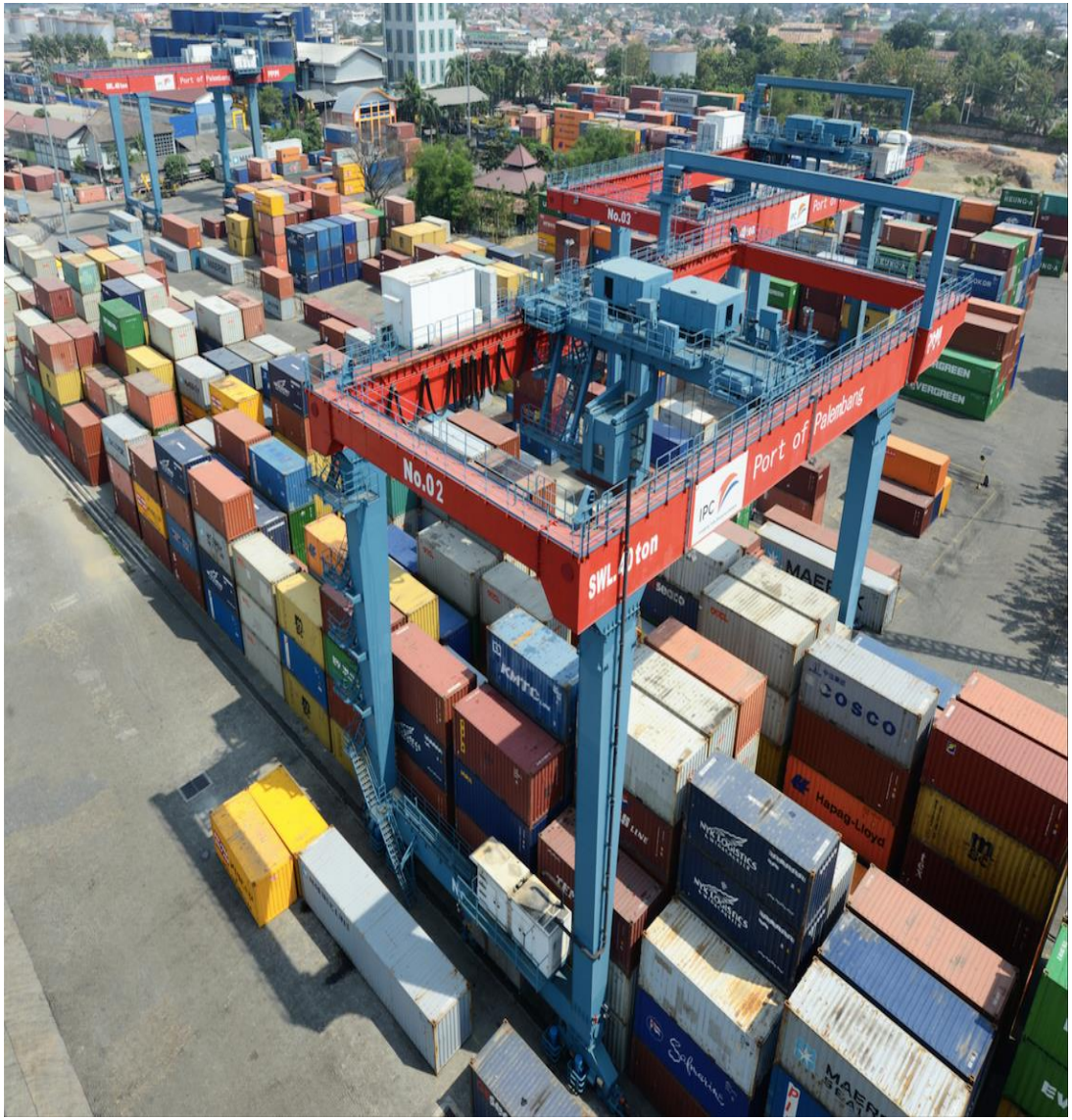
AFTER

AFTER

AFTER

AFTER

AFTER



Re-Modelling Port of Jambi

Port of Jambi

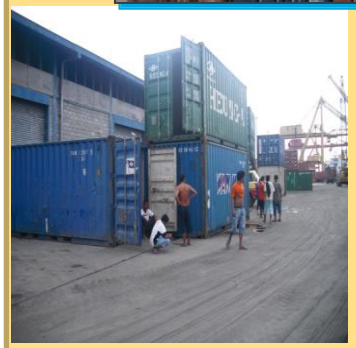
2 units Fixed Luffing Crane
3 units RMGC

Re-Modelling Port of Pontianak

BEFORE

AFTER

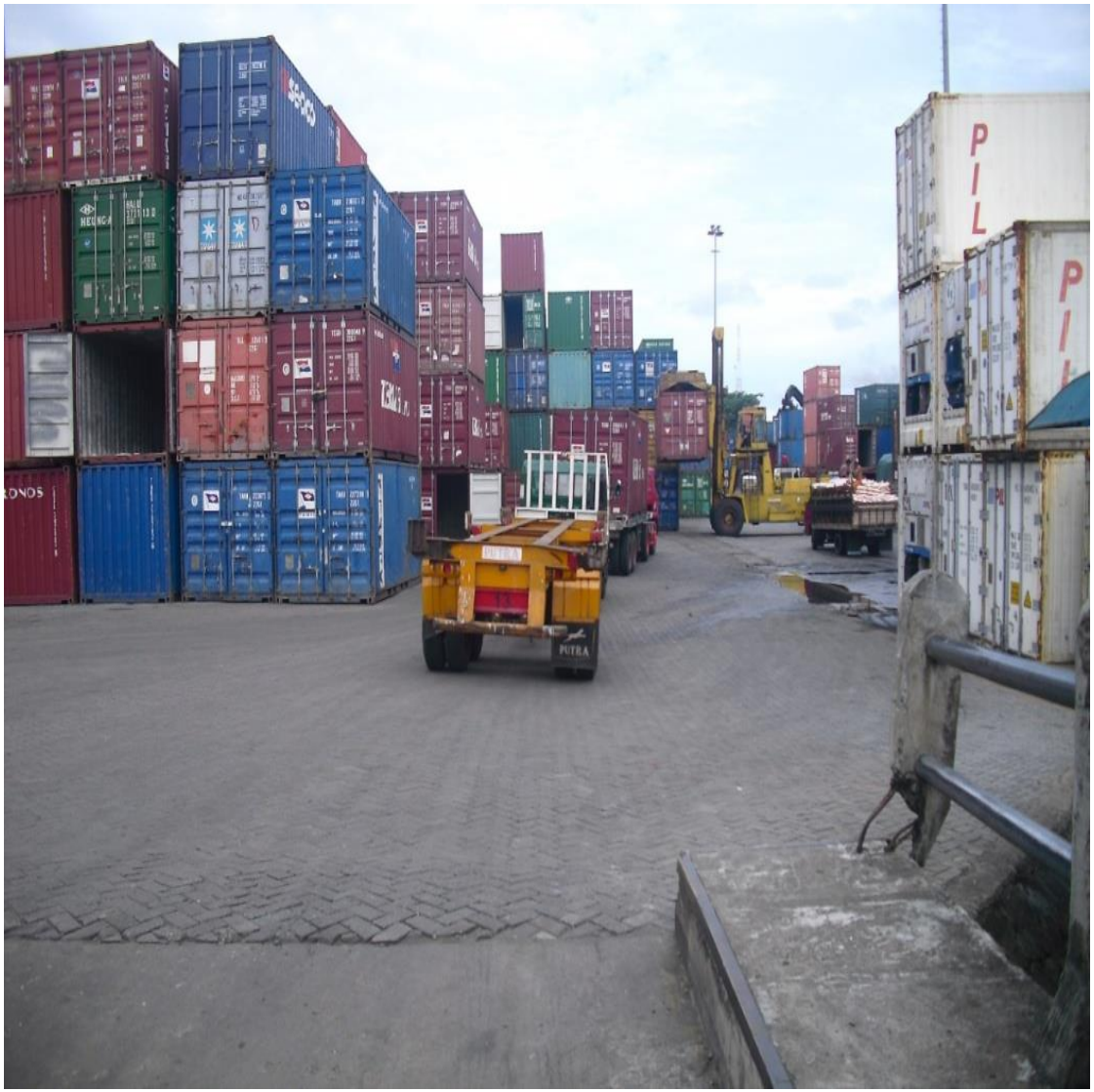
BEFORE



Kemacetan lalu

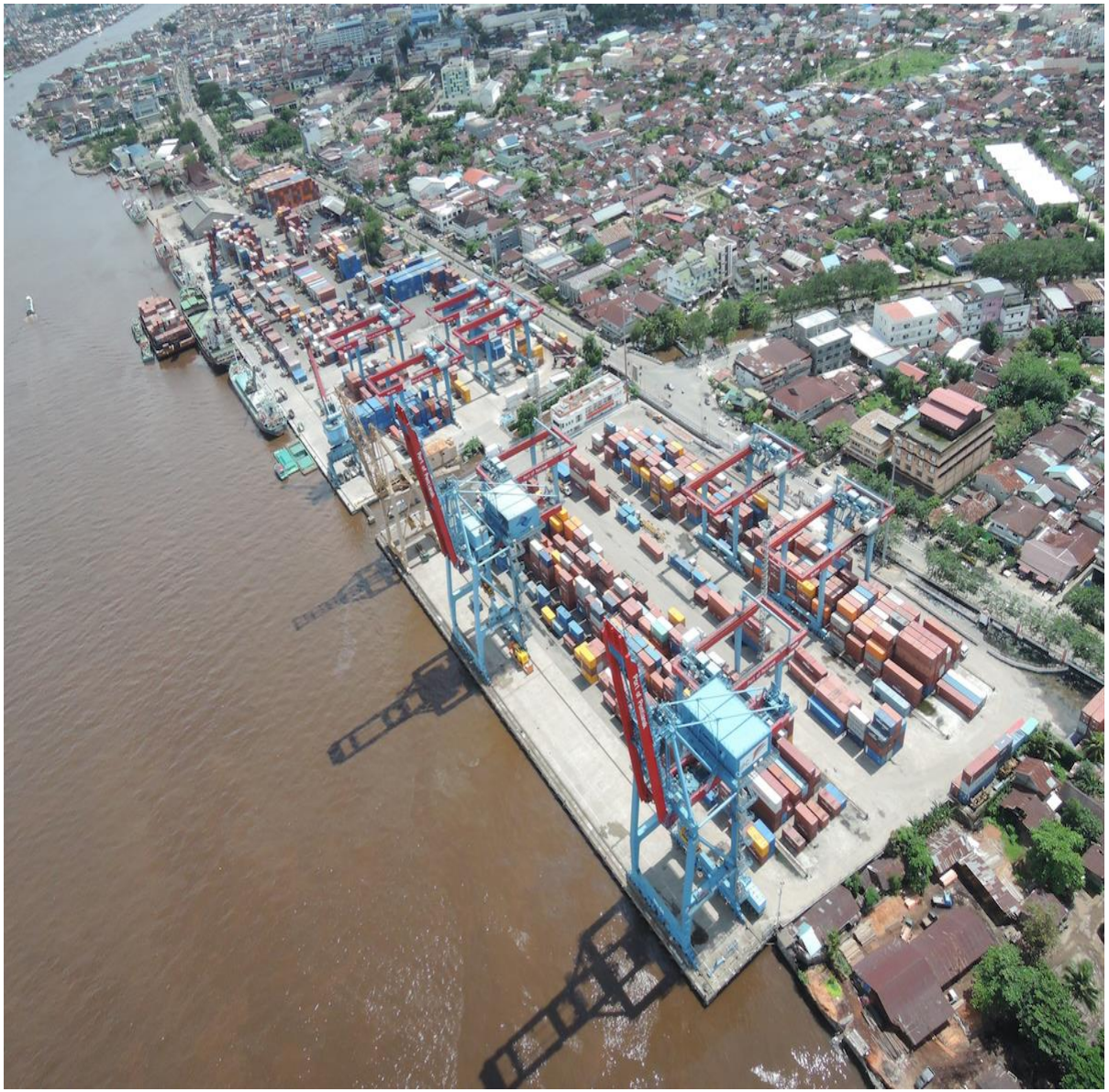
AFTER

BEFORE



AFTER

AFTER



Re-Modelling Port of Teluk Bayur

BEFORE

BEFORE

BEFORE

AFTER

AFTER

AFTER

AFTER

AFTER

Re-Modelling Port of Bengkulu

BEFORE

AFTER

BEFORE

AFTER

BEFORE

AFTER

Re-Modelling Port of Ciwandan-Banten

Port of Ciwandan

4 units Gantry Luffing Crane

New Port Development

NEW PRIOK TERMINAL DEVELOPMENT

NEW PRIOK TERMINAL DEVELOPMENT

THE SAME SIZE AS THE OLD TANJUNG PRIOK (130 YEARS), WITH TWICE THE CAPACITY

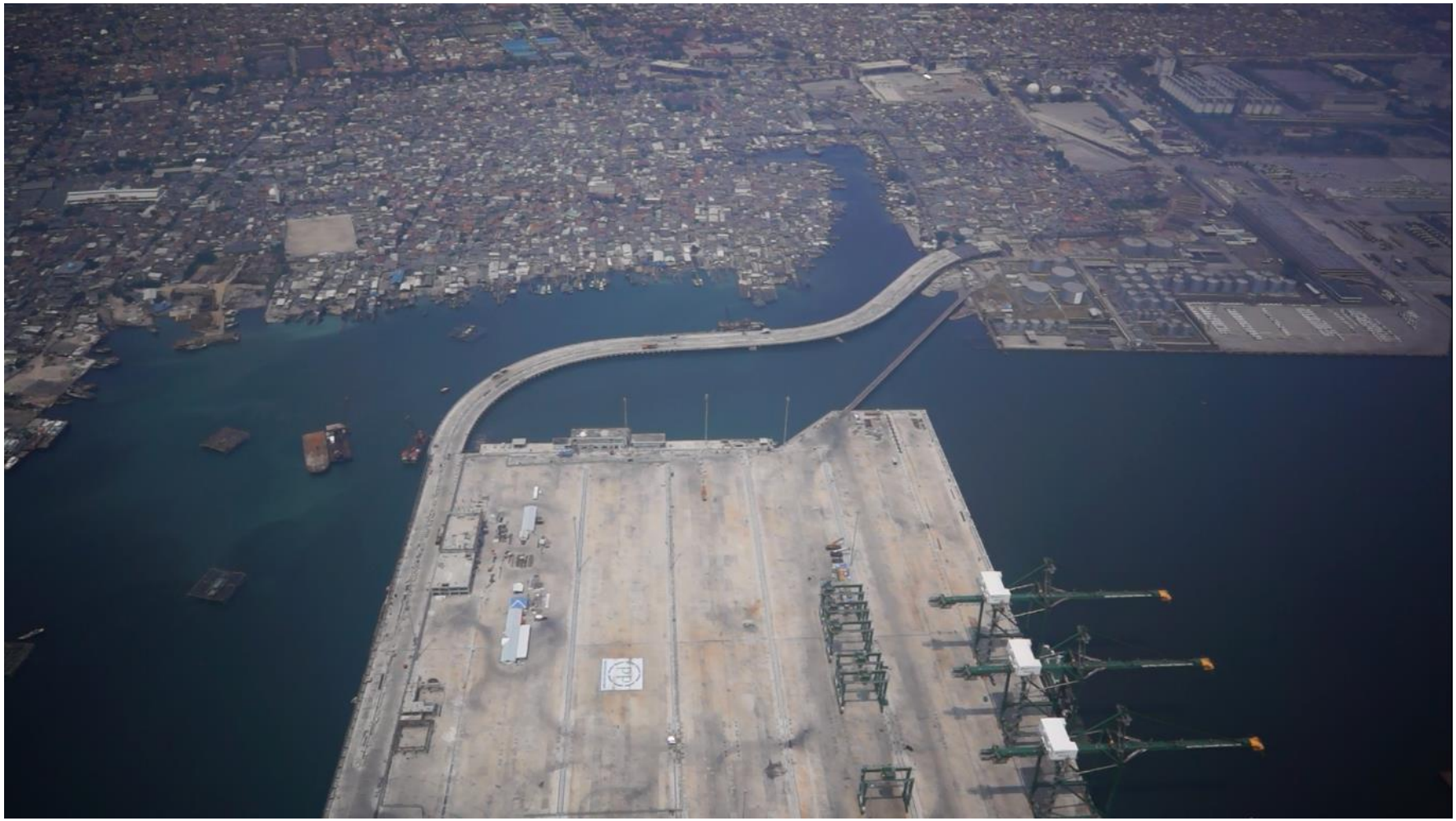
Access Road Development Plan

TERMINAL 1 NEWPRIOK

Equipment Installation Progress


801
802
803
STATE OF THE ART
CONTAINER TERMINAL

Access Road



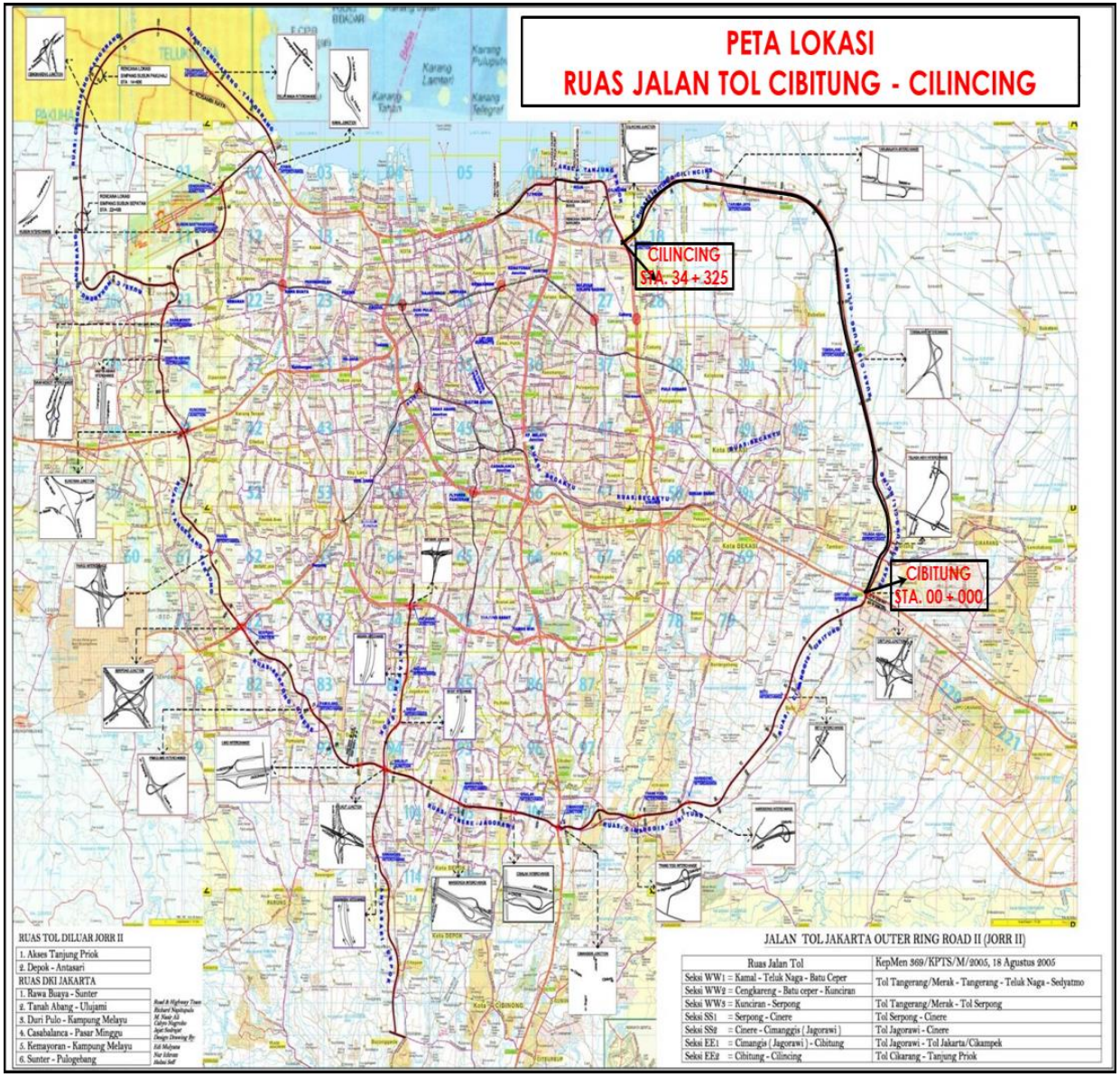
Access Road

Access Road (Sea Side) - 700 m of length

Access Road (Southern Side)

Southern access road (land side) – 1.2 km of length

ROAD ACCESS


PETA LOKASI
RUAS JALAN TOL CIBITUNG - CILINCING
CILINCING
STA. 34 + 325
CIBITUNG
STA. 00 + 000
RUAS TOL DILUAR JORR II
1. Akses Tanjung Priok
2. Depok - Antasari
RUAS DKI JAKARTA
1. Rawa Buaya - Sunter
2. Tanah Abang - Ulujami
3. Duri Pulo - Kampung Melayu
4. Casablanca - Pasar Minggu
5. Kemayoran - Kampung Melayu
6. Sunter - Pulogebang
JALAN TOL JAKARTA OUTER RING ROAD II (JORR II)
Ruas Jalan Tol
KepMen 369/KPTS/M/2005, 18 Agustus 2005
Seksi WW1 = Kamal - Teluk Naga - Batu Ceper
Seksi WW2 = Cengkareng - Batu ceper - Kunciran
Tol Tangerang/Merak - Tangerang - Teluk Naga - Sedyatmo
Seksi WW3 = Kunciran - Serpong
Tol Tangerang/Merak - Tol Serpong
Seksi SS1 = Serpong - Cinere
Tol Serpong - Cinere
Seksi SS2 = Cinere - Cimanggis (Jagorawi)
Tol Jagorawi - Cinere
Seksi EE1 = Cimangis (Jagorawi) - Cibitung
Tol Jagorawi - Tol Jakarta/Cikampek
Seksi EE2 = Cibitung - Cilincing
Tol Cikarang - Tanjung Priok

INLAND WATERWAYS
TG-PRIOK – BEKASI- CIKARANG

INDLAND WATERWAY FROM TG.PRIOK - BATAVIA

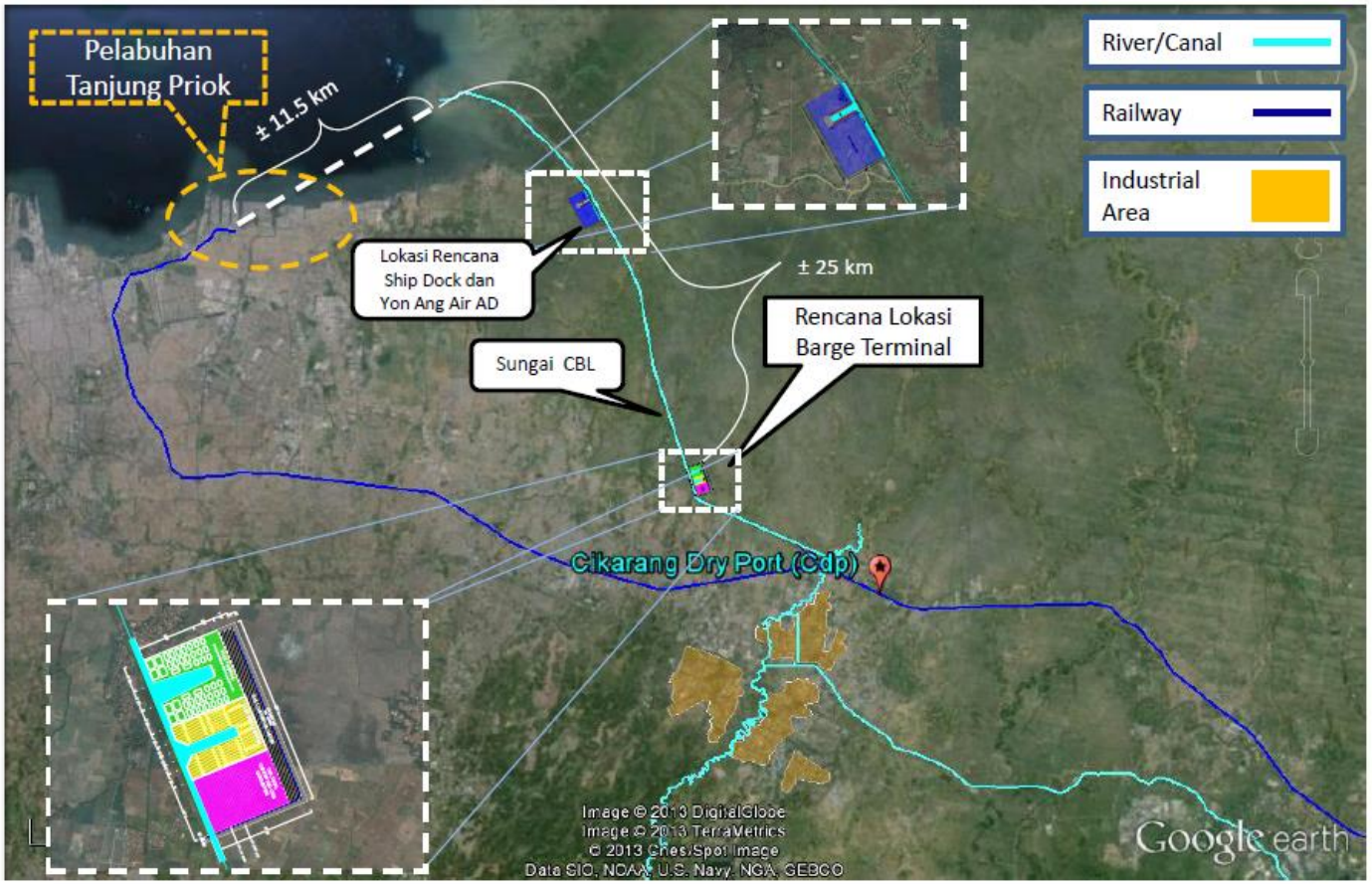
Container Barge

Twente Canal (5,000 DWT barge)

The Manchester Ship Canal (160 TEU barge)

Existing Layout of CBL Canal

PEMBANGUNAN INLAND WATERWAYS DI KAWASAN BEKASI

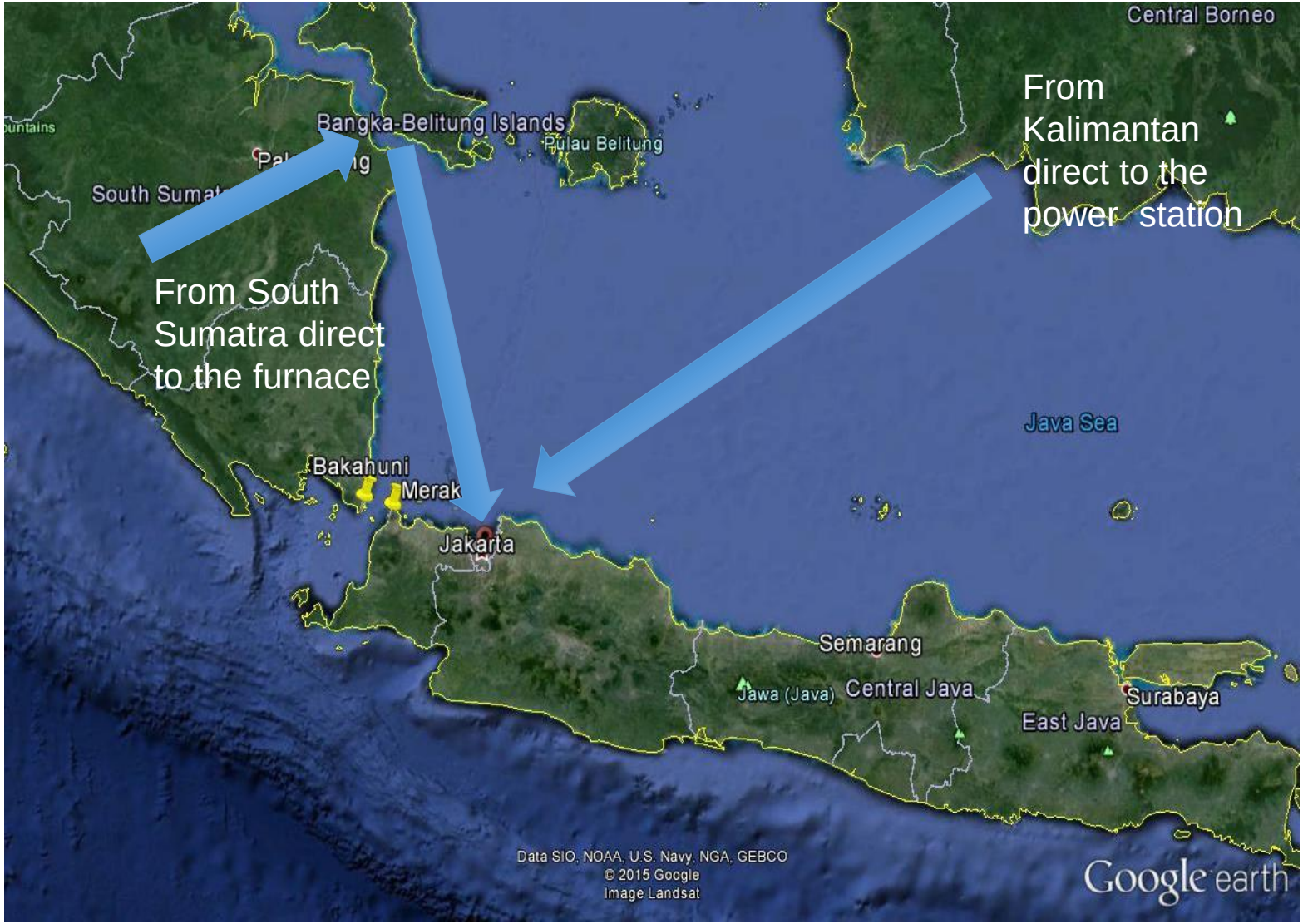


Development Phase : *2015-2019*

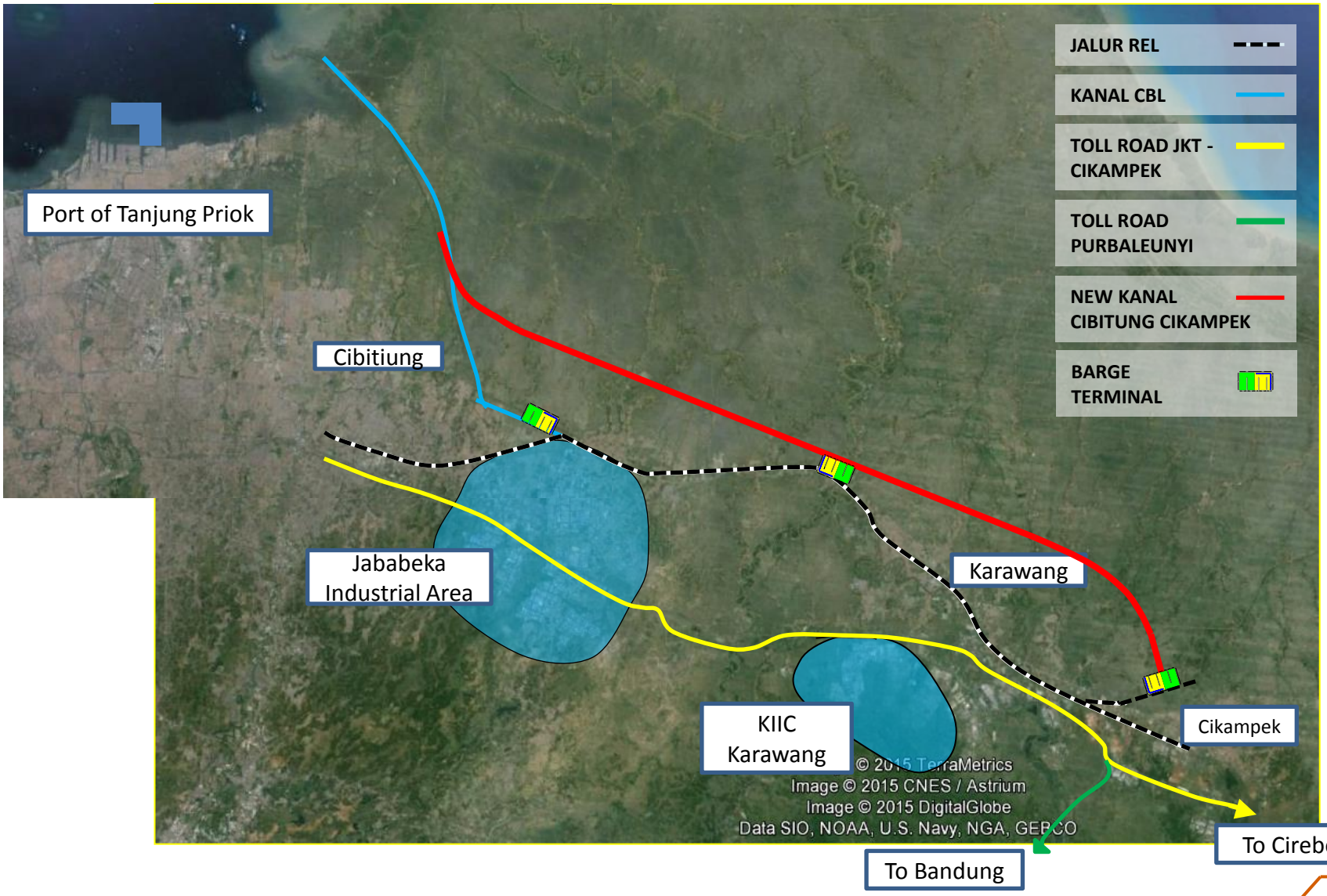
IPC

Removing 3 million TEU from our roads

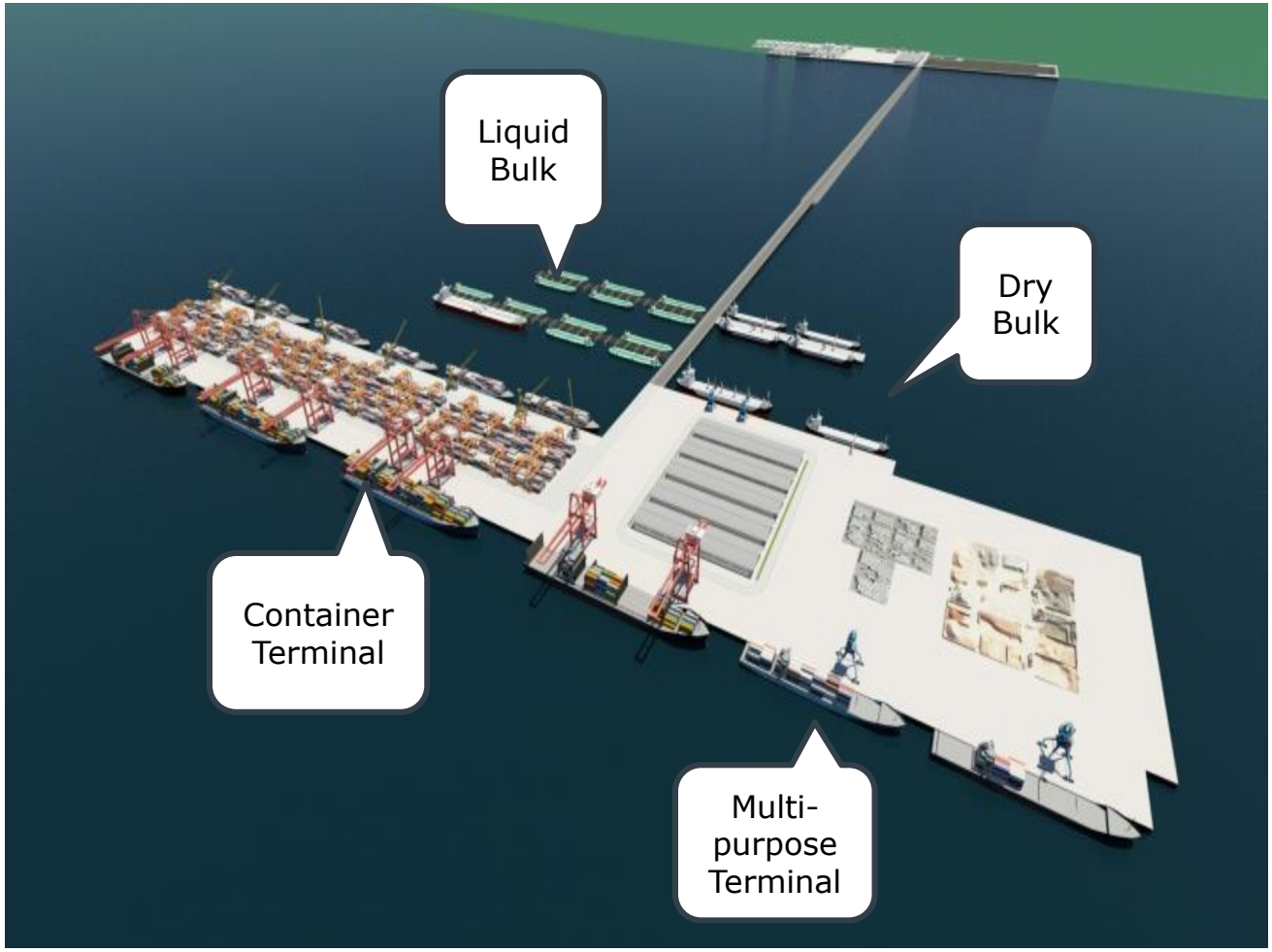
Potential coal and iron ore operation



Purpose New Canal Cibitung-Cikampek



Kijing – New Deep Water Port West Kalimantan



Source: BMT

Industrial Area & Cargo Distribution Center

Inland Waterways In West Kalimantan

CPO will be a major cargo at the port given the access to plantations via the Kampuas river

Global Maritime and Port Services Pte Ltd

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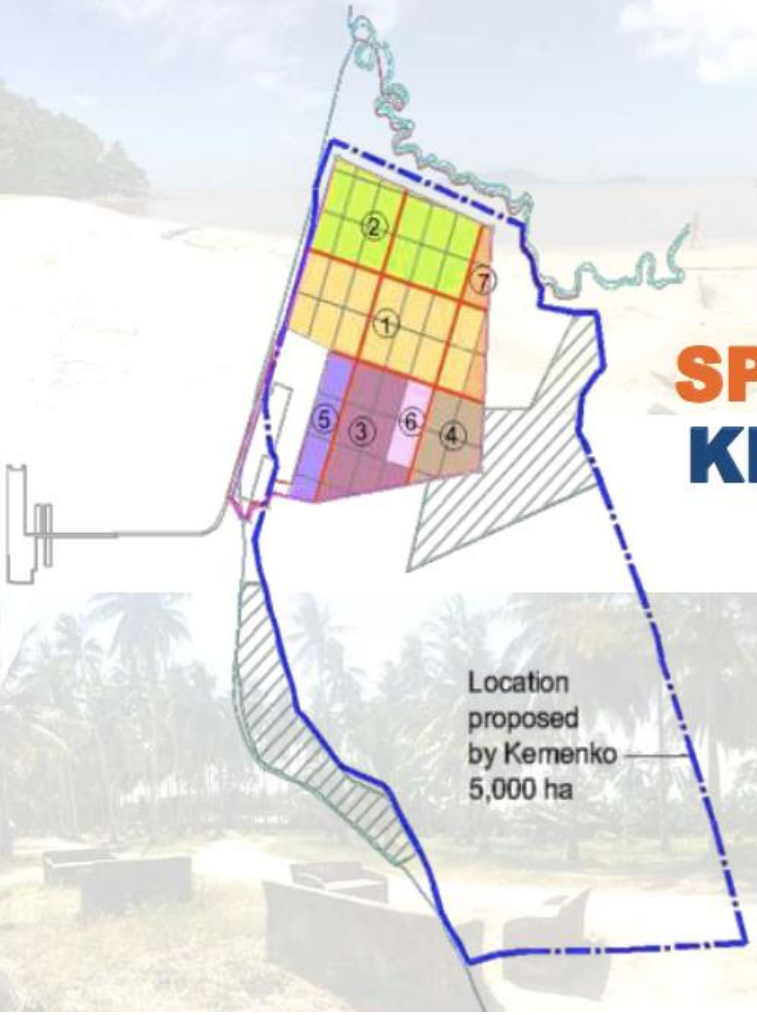
PT PELABUHAN INDONESIA II (PERSERO)

Presentation



PRELIMINARY STUDY OF SPECIAL ECONOMIC ZONE AT KIJING – WEST KALIMANTAN INDONESIA

CONSULTANT
Global Maritime and Port Services Pte Ltd

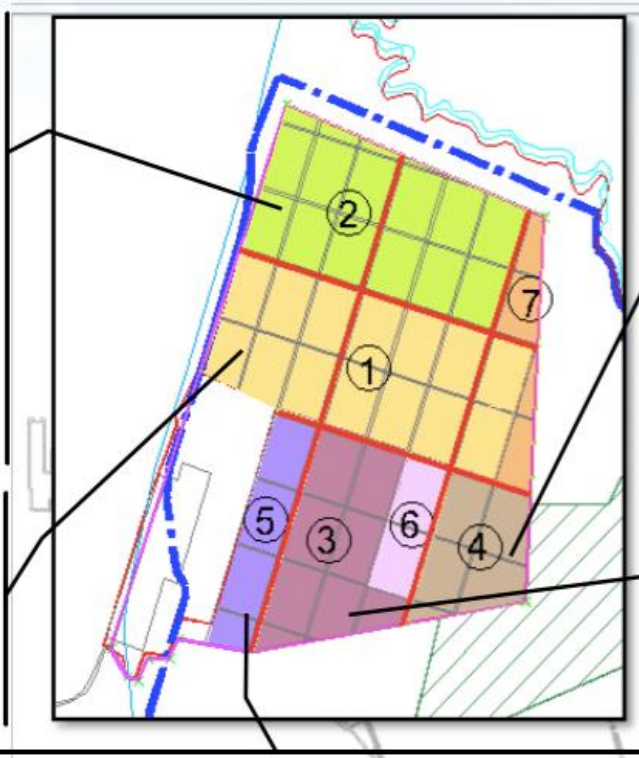
CLIENT
Indonesia Port Corporation (Pelindo II)

Focus on Preliminary Layout Plan

Issue: How the proposed Kijing SEZ (Phase 1) potentially looks like?

Rubber Industry: (1) Premium shore/seaside frontage to meet logistics needs; (2) northern border to facilitate access to raw materials from inland areas; (3) Border site to minimize potential pollution impacts on neighboring zones.

Palm Oil Industry: Premium shore/seaside frontage to meet liquid bulk product logistics needs.



Mixed Industry Zone (Miscellaneous light industries): (1) Integration with spillovers from other industry zones; (2) Access from outside of the proposed SEZ.

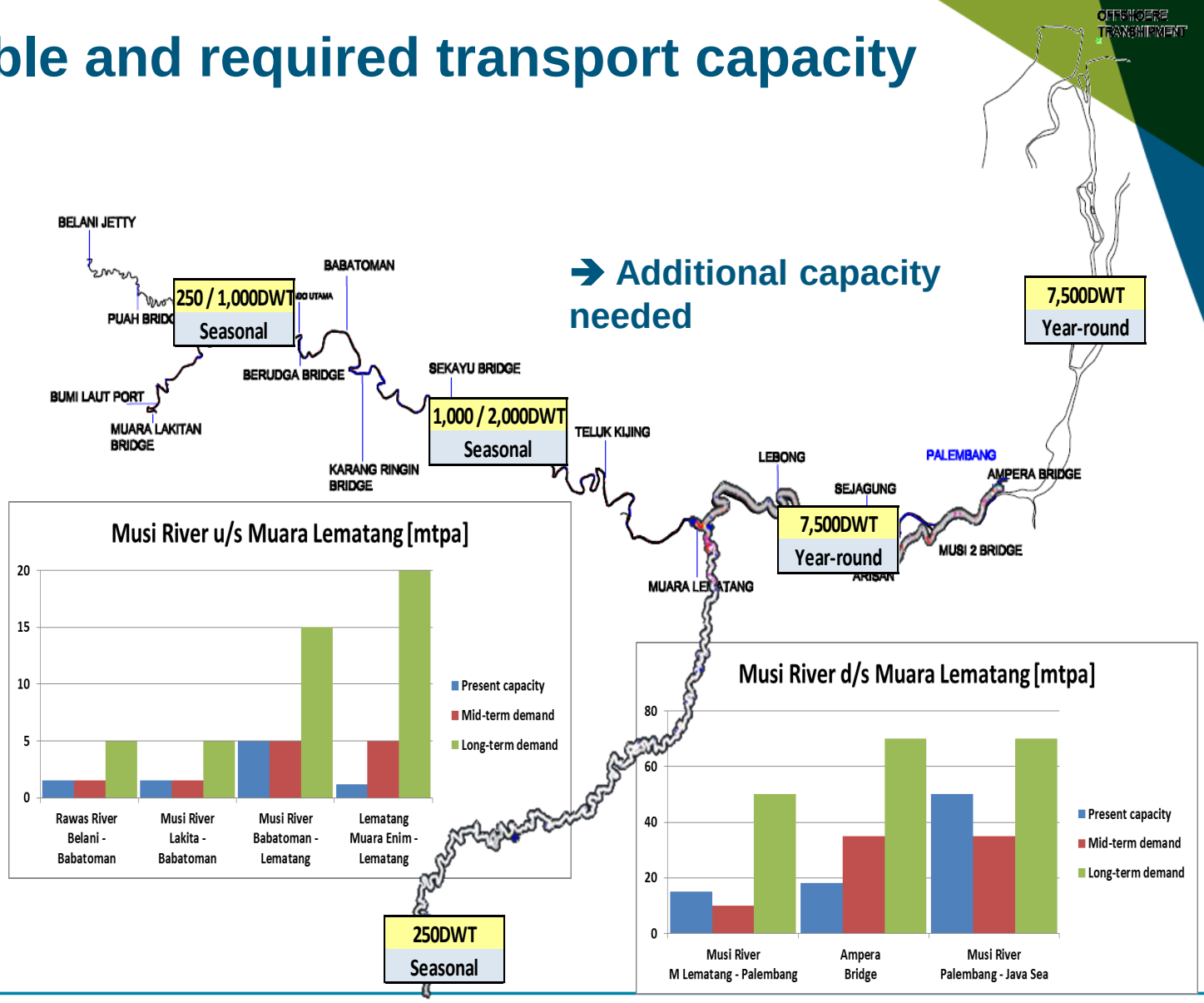
Food Processing Industry: (1) Away from potentially pollutive Rubber zone; (2) Adjacent to any future expansion of the proposed Kijing SEZ beyond Phase 1 as the Kalbar economy matures and industry value chain deepens with expanded downstream activities adding value to upstream food commodities.

Logistics Industry: (1) Proximity to the proposed Kijing deepwater port development to facilitate integration with port operations; (2) Easy access to arterial roads for efficient logistics operations; (3) Adjacent to any future SEZ expansion beyond Phase 1 to share facilities and optimize ROI.

New Tanjung Carat Port South Sumatera

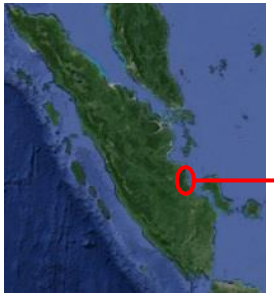
South Sumatera Area and River

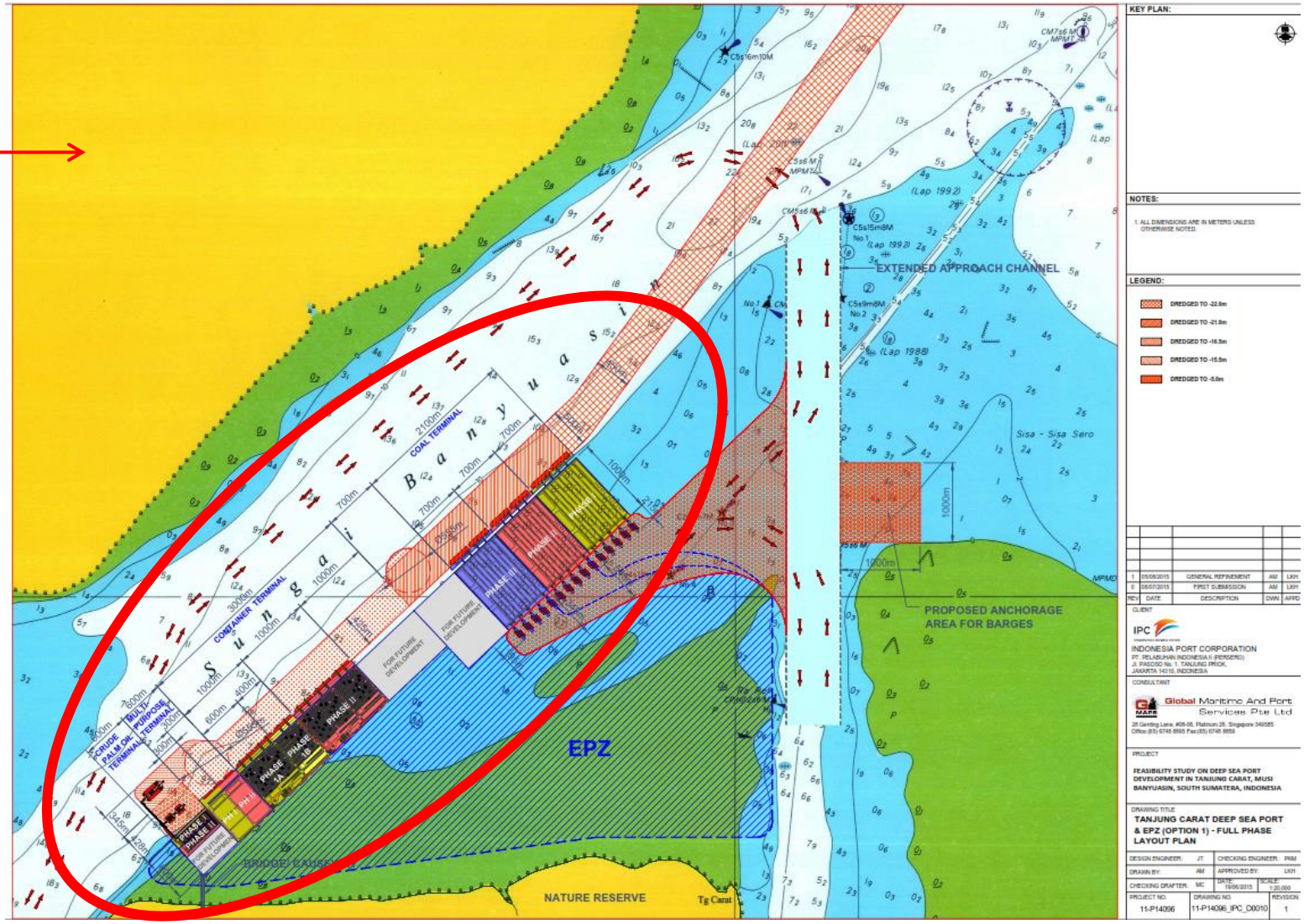
Available and required transport capacity



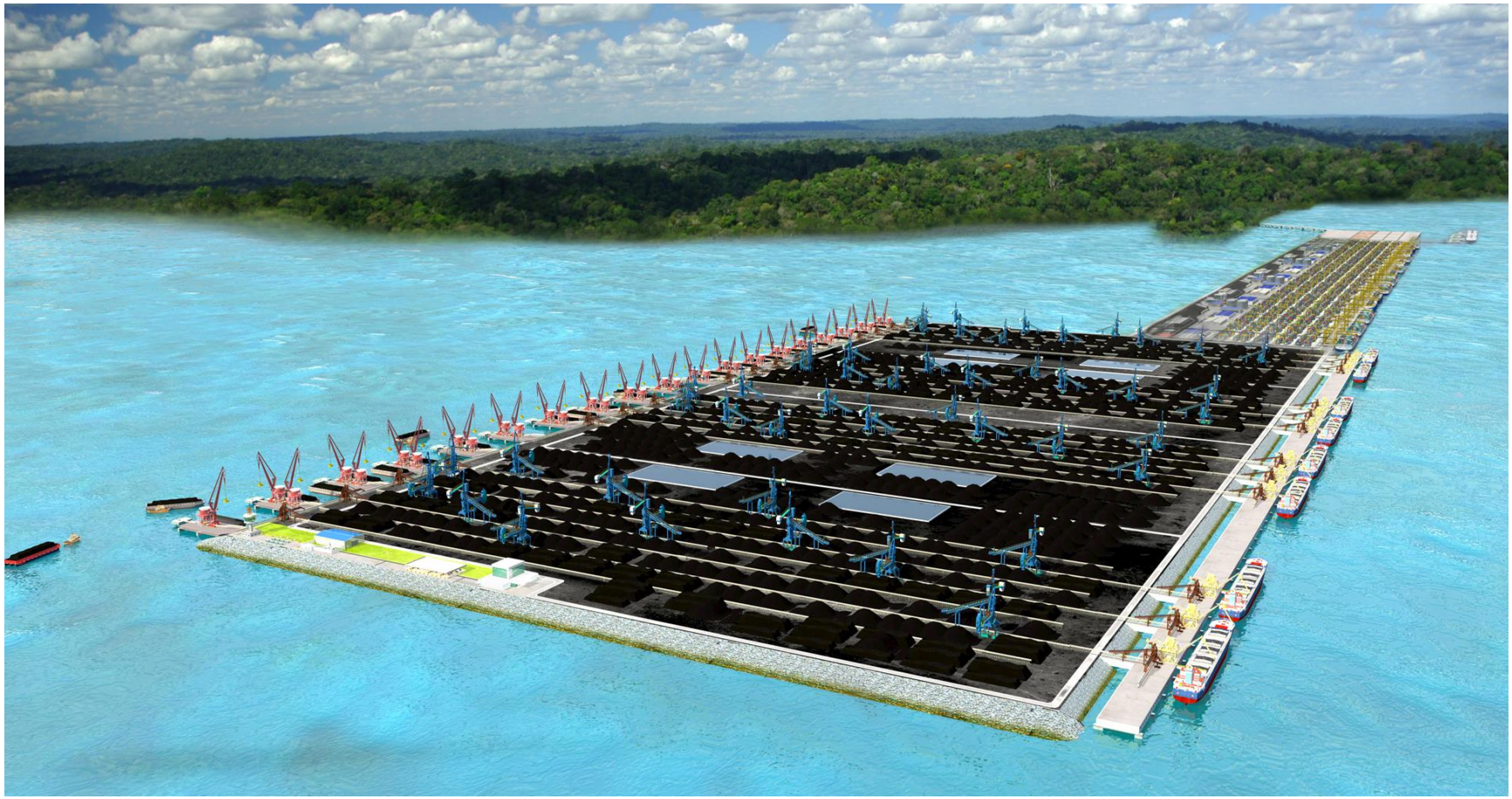
Tanjung Carat Deep Sea Port Development

Port Development Plan In Tanjung Carat – South Sumatera



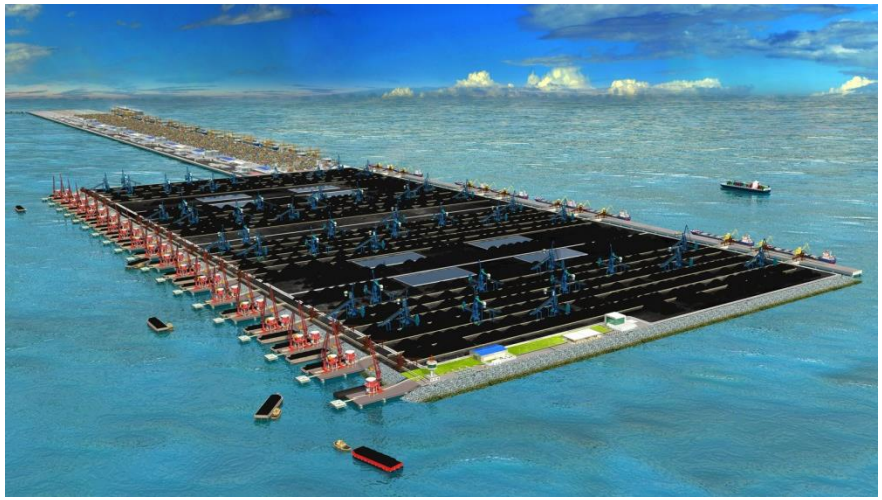


Tanjung Carat Development Plan



Tanjung Carat Development Plan

Tanjung Carat New Deep Port Development, Sumatera Selatan

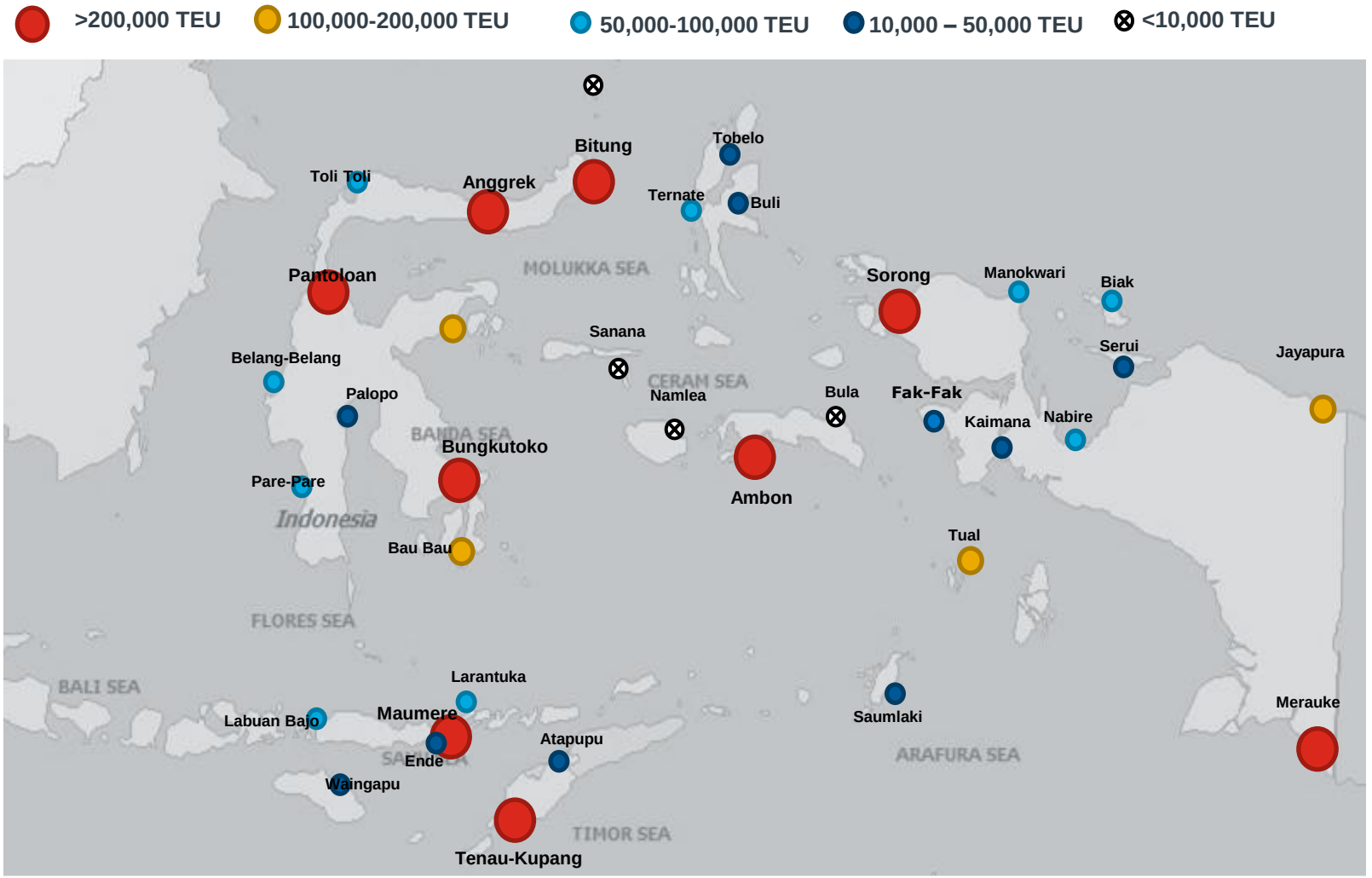


- **Project Location**: *South Sumatera*
- **Term Development** : *36 Months (2015 - 2018)*
- **Development Plan**: *First Quarter of 2016*
- **Operation Plan** : 2018

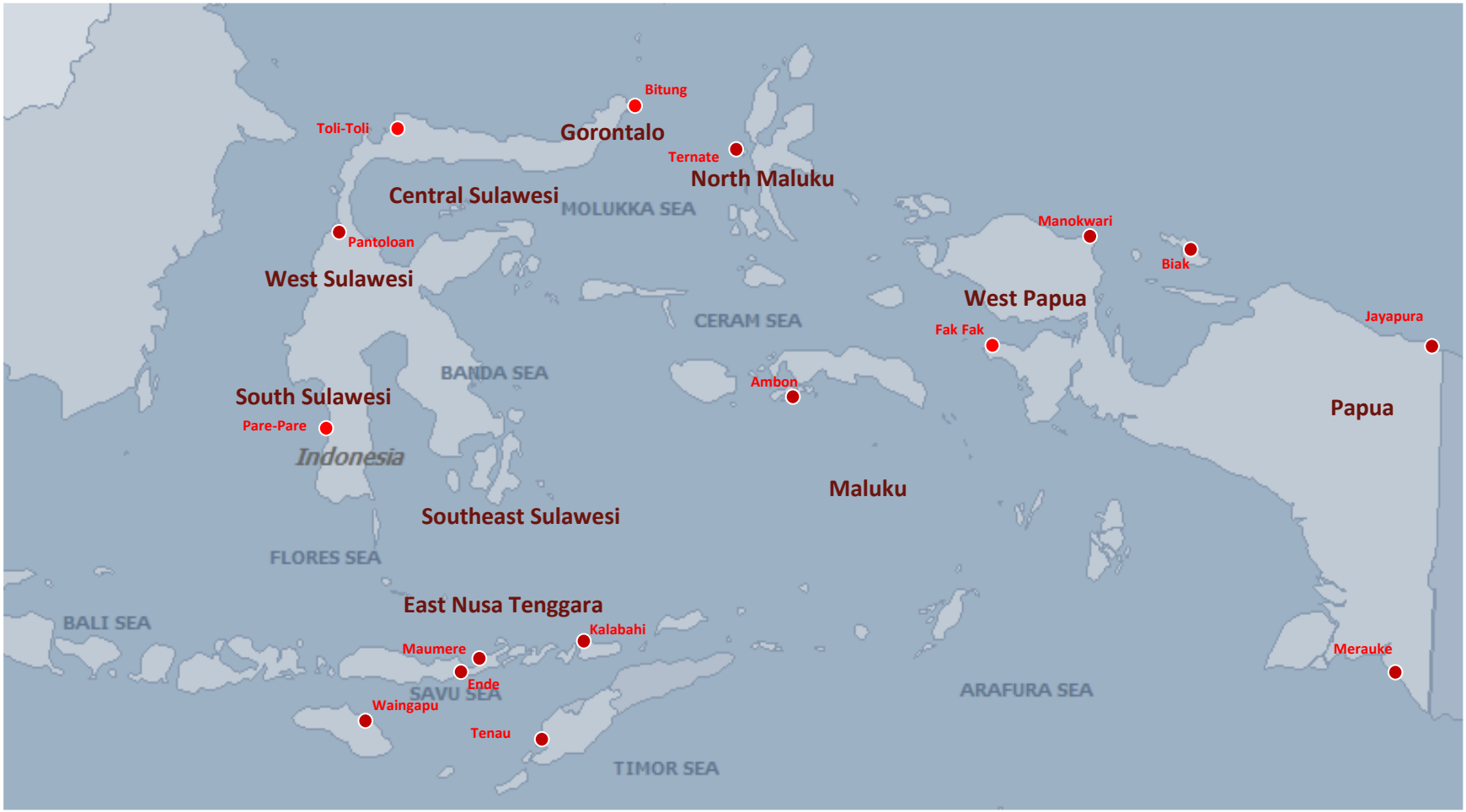
- **Benefit of program**:
  - Overcome limitation of the existing port and Musi River flow to serve vessel with the larger size and accomodate larger volume;
  - Added capacity up to 20 Milion Ton

East Indonesia Ports Development

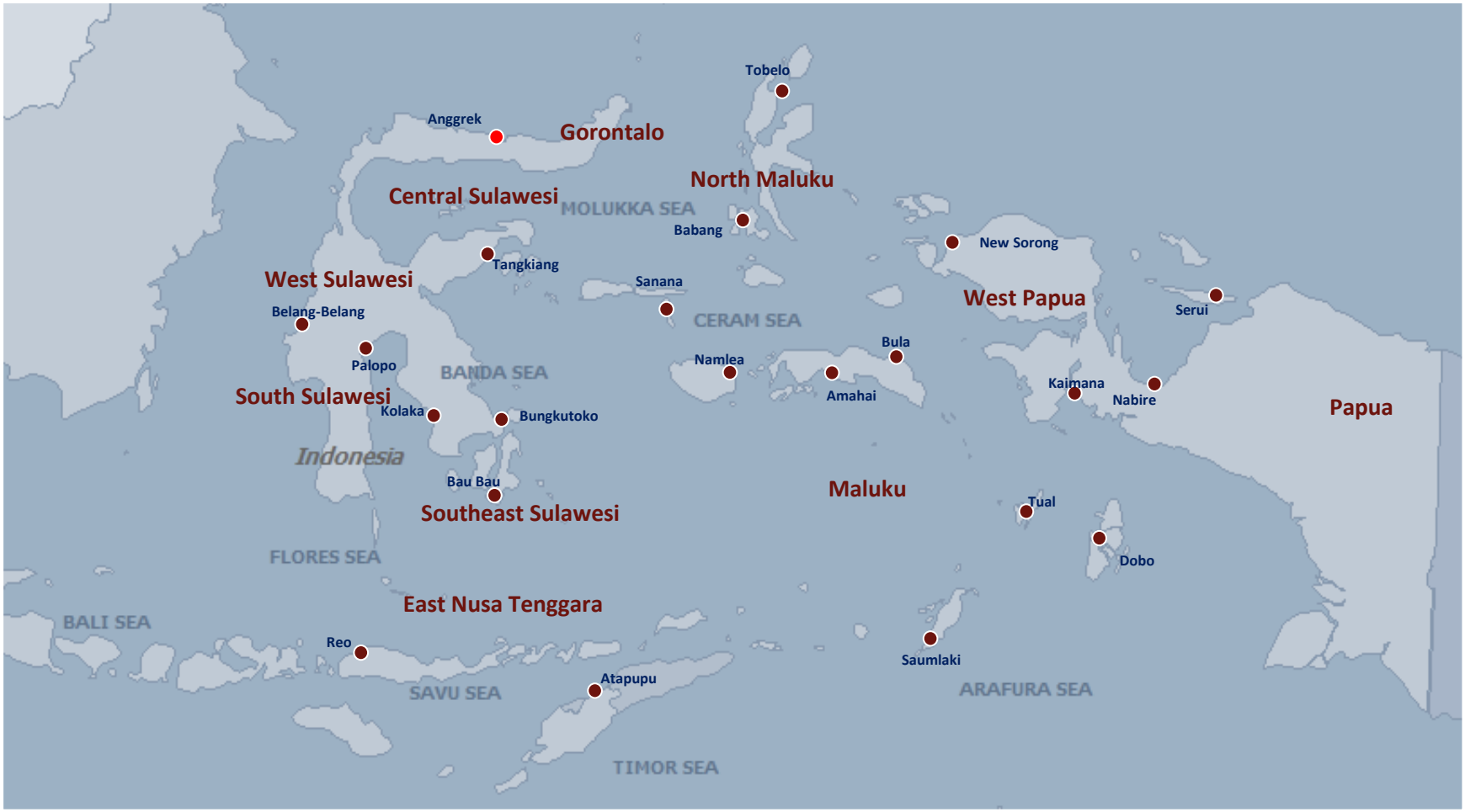
Container volume snapshot: 2040



Ports owned by Pelindo III & IV requiring upgrades

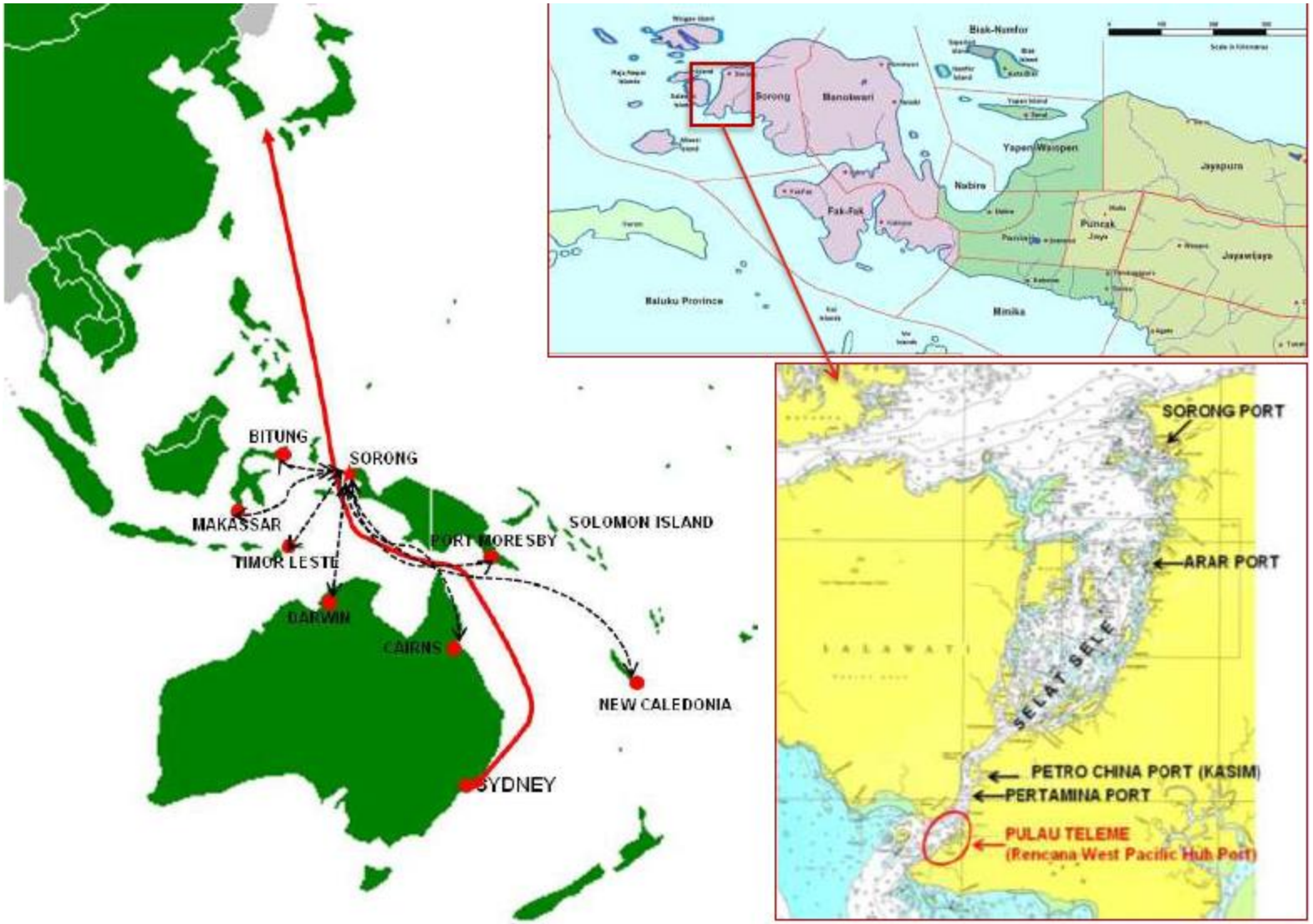


Ports owned by Ministry of Transport

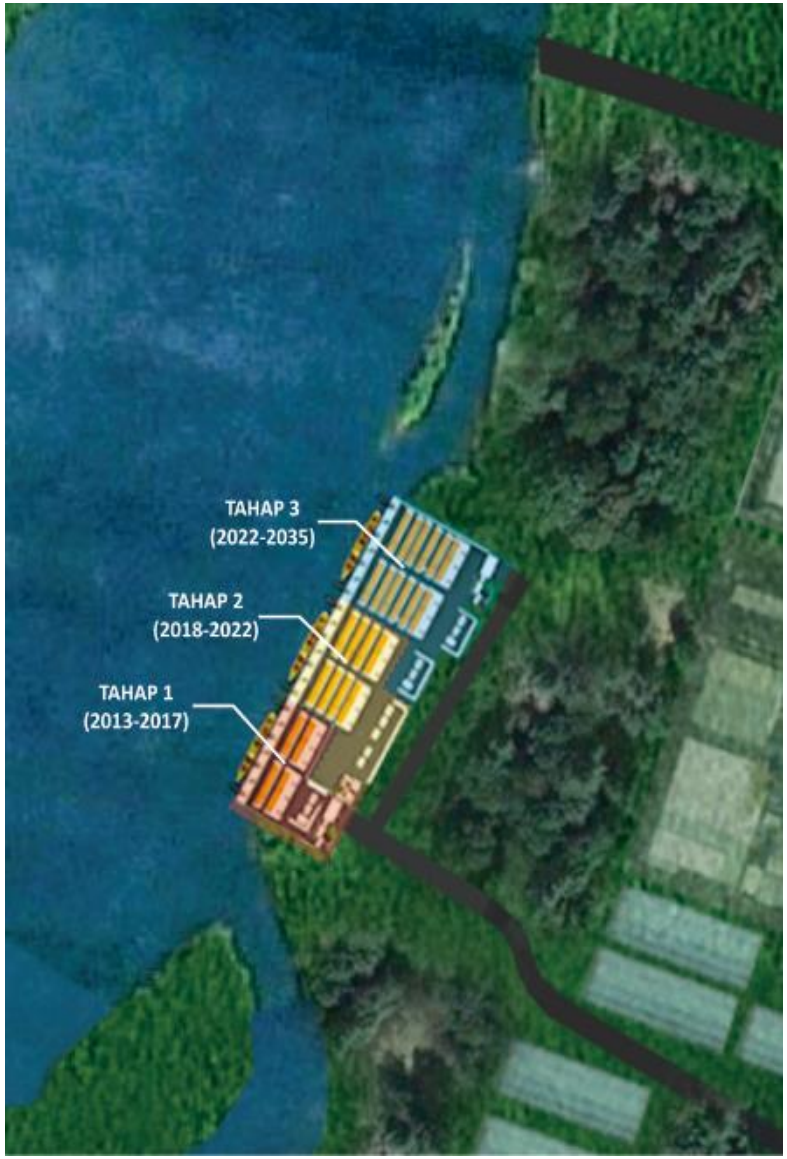


New Sorong Port - West Papua

Seget - Sorong Port Development Plan



DEVELOPMENT STAGES OF SORONG PORT



No	Activity		Phase I	Phase II	Phase III	Total
	Uraian		2013-2017	2017-2022	2022-2035	
1	Capacity	TEUs	500,000	950,000	1,500,000	1,950,000
2	Land Aquitition	Ha	10,000			10,000
3	Berth	m	540	400	500	1,440
4	Container Yard	Ha	16	13	15	44
5	Equipment					
	QCC	Unit	4	4	5	13
	RTGC		8	7	11	26
	Reach Staker		3	2	4	9
	Head Truck		19	20	29	68
	Chassis		56	60	87	203
6	Utilization	Ls	1	1	1	3
7	Facility Development					
	Gate		1			1
	Kantor		1			1
	PMK		1	3		1
	CFS		1			1
	Workshop		1	1	1	3
	Dormitory		2			2
	Masjid		1			1
	Kantin		1			1

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PT PELABUHAN INDONESIA II (PERSERO)

Presentation

PRELIMINARY STUDY OF SPECIAL ECONOMIC ZONE AT SORONG – WEST PAPUA INDONESIA

CONSULTANT
Global Maritime and Port Services Pte Ltd

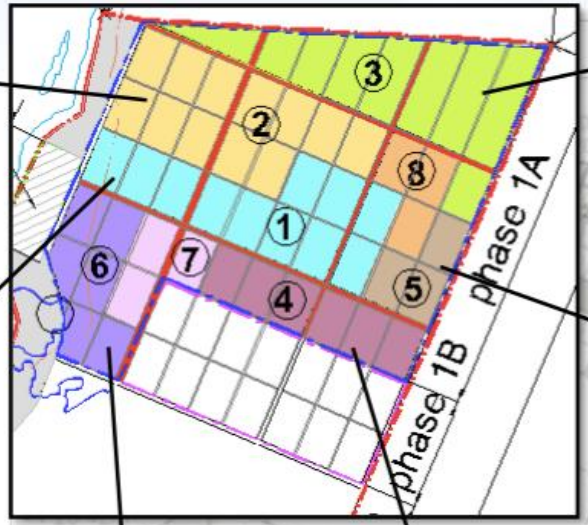
CLIENT
Indonesia Port Corporation (Pelindo II)

Focus on Preliminary Layout Plan

Issue: How the proposed Sorong SEZ (Phase 1A) potentially looks like?

CPO and Downstream Industry: Premium shore/seaside frontage to meet liquid bulk product logistics needs.

Fishery Industry: (1) Premium shore/seaside frontage for fresh seafood processing and logistics needs; (2) Proximity to Utility zone to tap reefers power supply.



Timber and Construction Industry: (1) Border siting to facilitate access to raw materials from inland areas; (2) Minimize potential pollution impacts caused to neighboring industries.

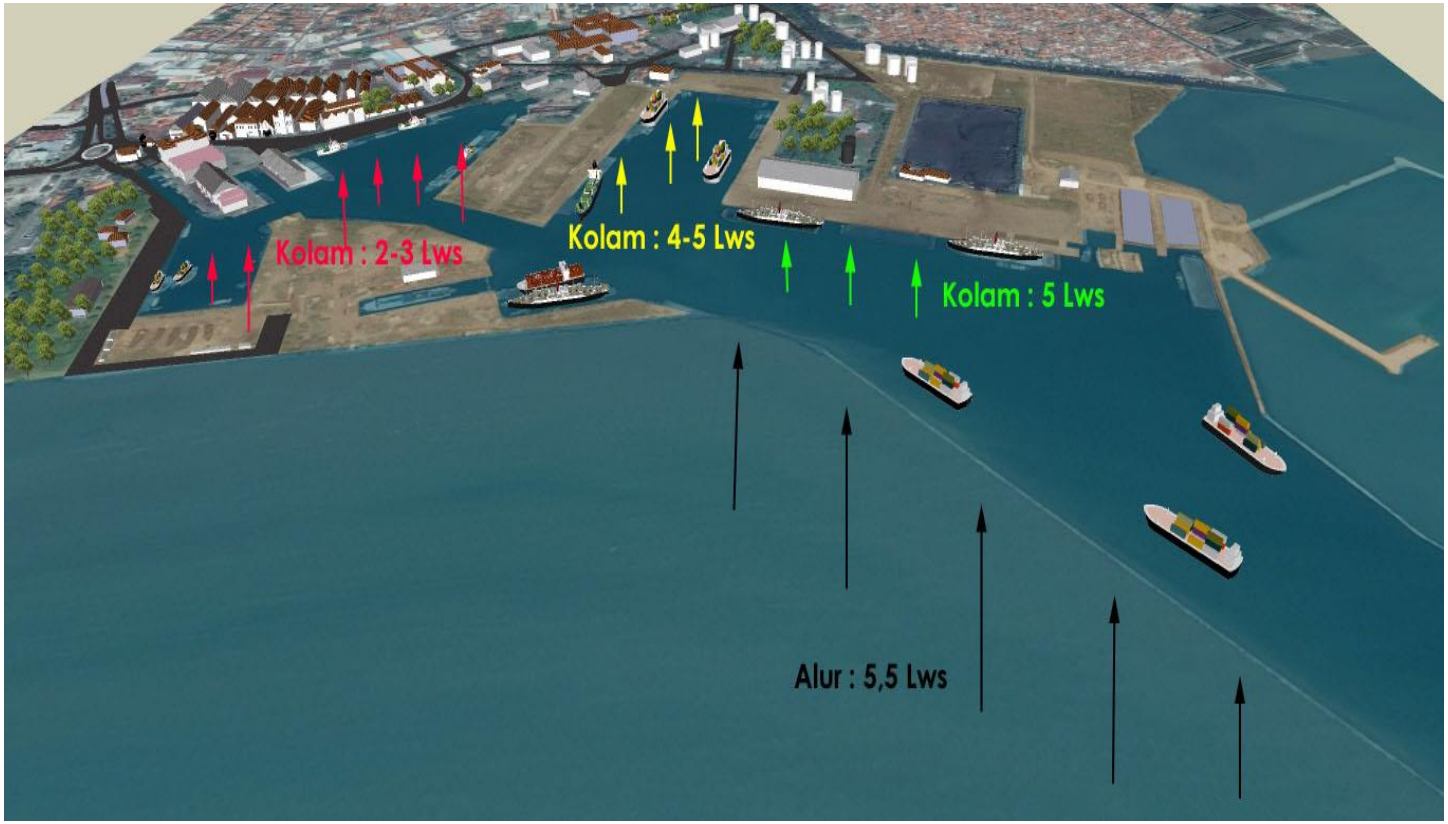
Mixed Industry zone (miscellaneous light industries): (1) Border siting to facilitate integration with spillovers from other industry zones; (2) Easy access from outside of the proposed SEZ.

Logistics Industry: (1) Adjacent to the proposed Seget deepwater port development to facilitate integration with port operations; (2) Easy access to arterial roads for efficient logistics operations; (3) Adjacent to future Phase 1B and Phase 2 in anticipation of facilities sharing to optimize the ROI of future expansion.

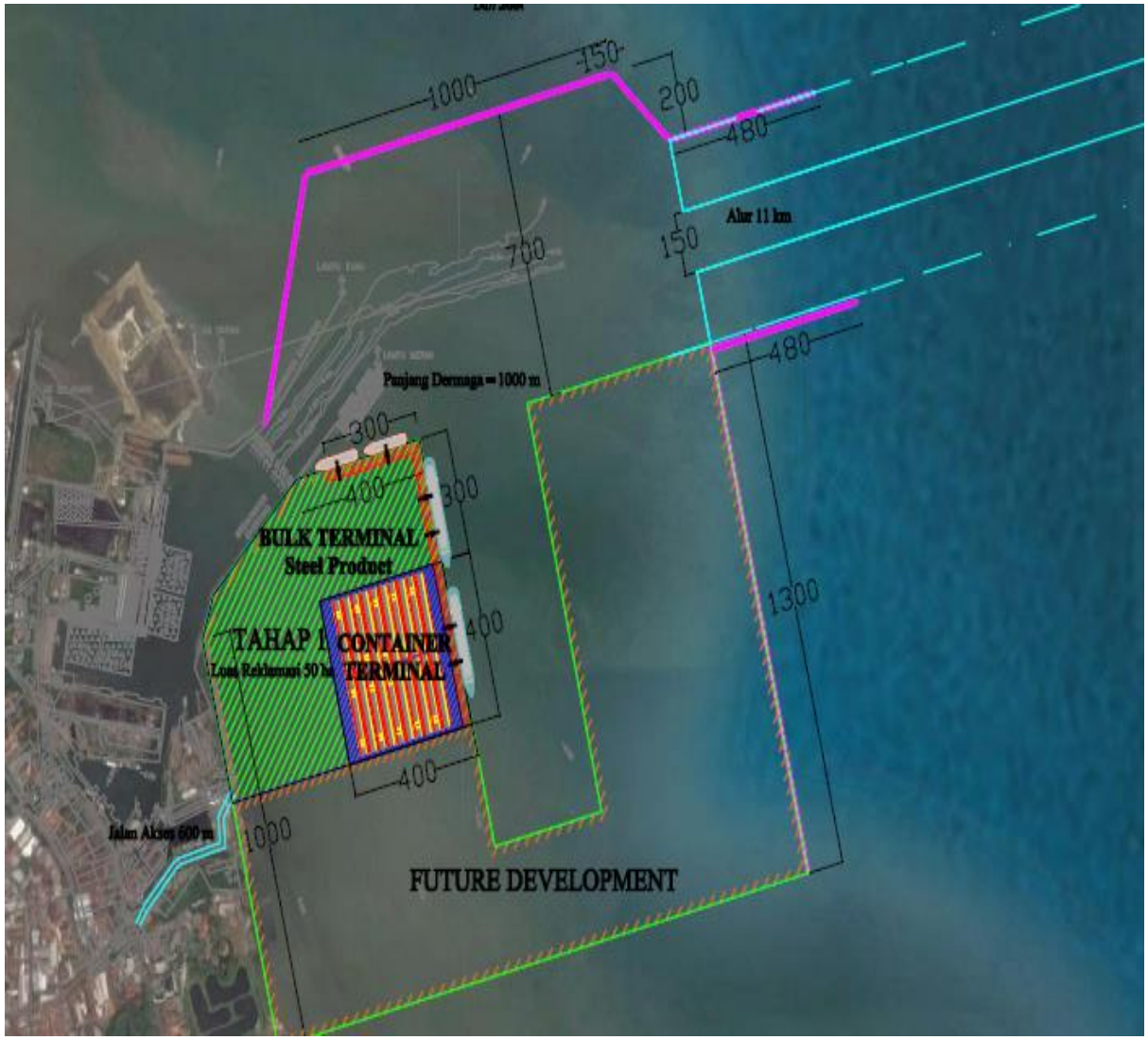
Food Processing Industry: (1) Located away from potentially pollutive Timber and Construction zone; (2) Adjacent to future Phase 1B and Phase 2 in anticipation of expansion of the Food Processing Industry as the Papua Barat economy matures and industry value chain deepens with expanded downstream activities adding value to upstream food commodities.

NEW MUARA JATI PORT
CIREBON, WEST JAVA

EXISTING PORT OF MUARA JATI



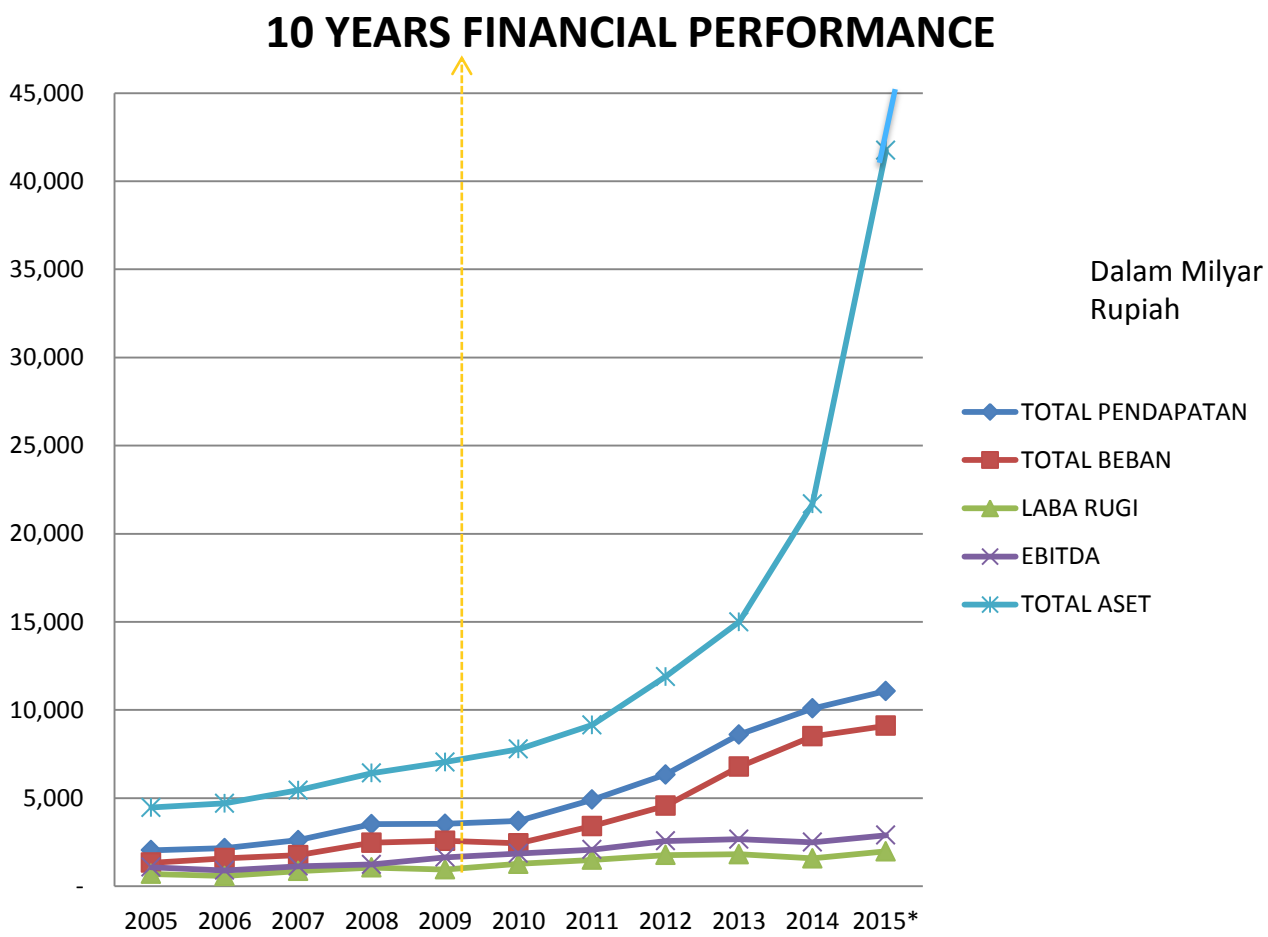
Development Plan
New Muara Jati Phase I : 50 Ha
(2015-2020)



Development Plan
New Muara Jati Port Phase II : 153 Ha (2020-2030)

IPC Performance

PT PELINDO II (PERSERO) FINANCIAL PERFORMANCE



* PROYEKSI

CURRENT SITUATION

CASH : Rp 18.5 Triliun

RISK FREE CASH FLOW: US$ 288 MILLION / year atau Rp. 4 Triliun

GLOBAL BOND : US$ 4 Billion (Rp. 55 Triliun)

Thank You

IPC

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