



BALI SPECIAL ECONOMIC ZONES

Catalyst for Sustainable Transformation

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Tri Hita Karana G20 Bali Global Blended Finance Alliance Dialogue
“New Era Bali Kerthi Roadmap: Quantum AI, Innovation and Blended
Finance for Better Business Better World”

20 JUNE 2025



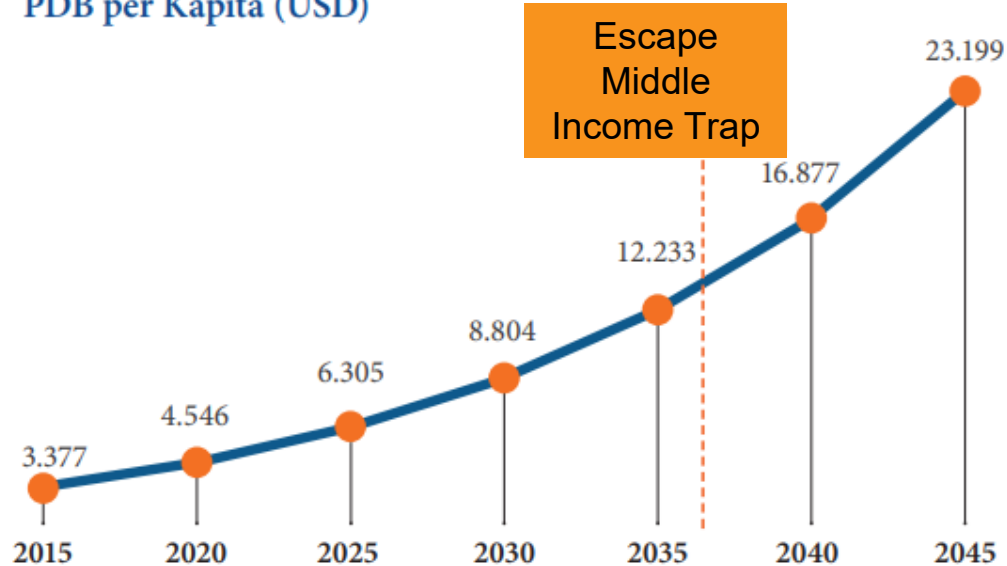
INDONESIA VISION 2045



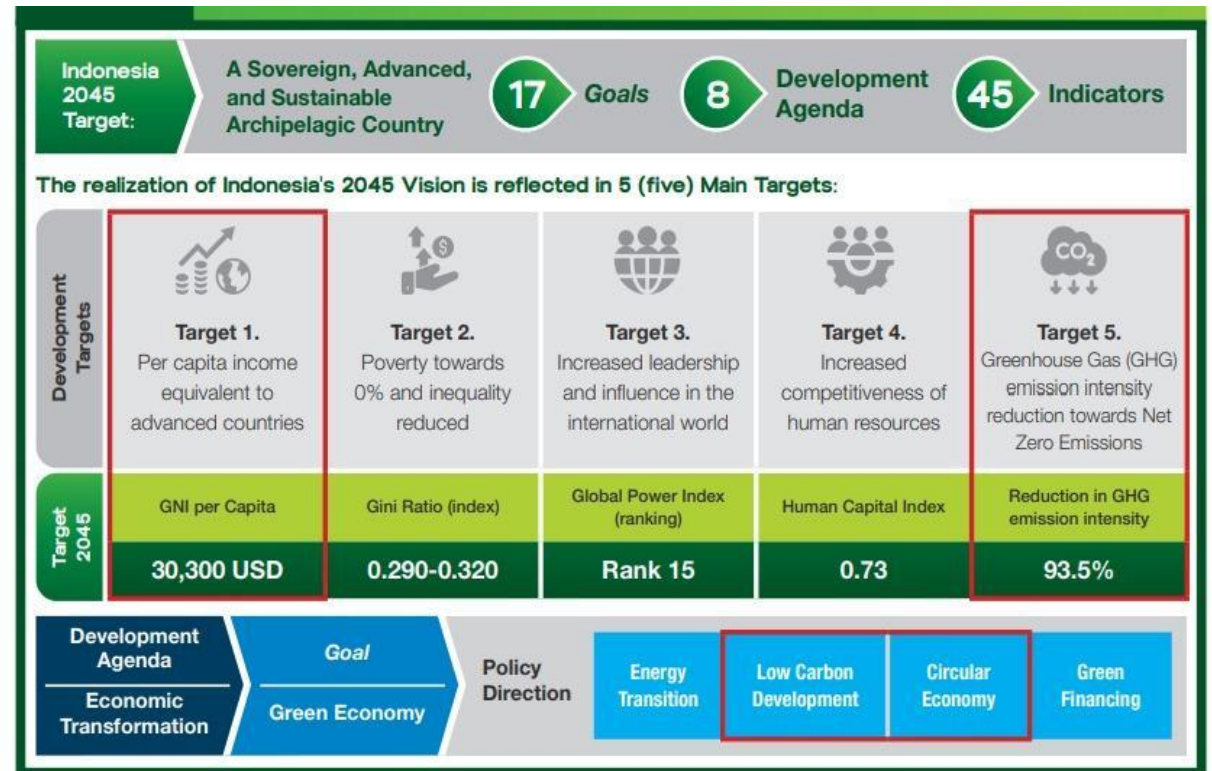
Indonesia's Long-Term Development Plan 2025–2045 (Indonesia Golden Vision 2045) aims to position the country as the world's 4th largest economy by 2045. To achieve this, Indonesia is pursuing a green economic transformation, targeting a 93.5% reduction in greenhouse gas emissions and a GNI per capita of USD 30,300 through energy transition, low-carbon development and a circular economy approach.

INCOME PERCAPITA (USD)

PDB per Kapita (USD)



Source: Bappenas, 2019



Source: Bappenas, 2023



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indonesia SEZ



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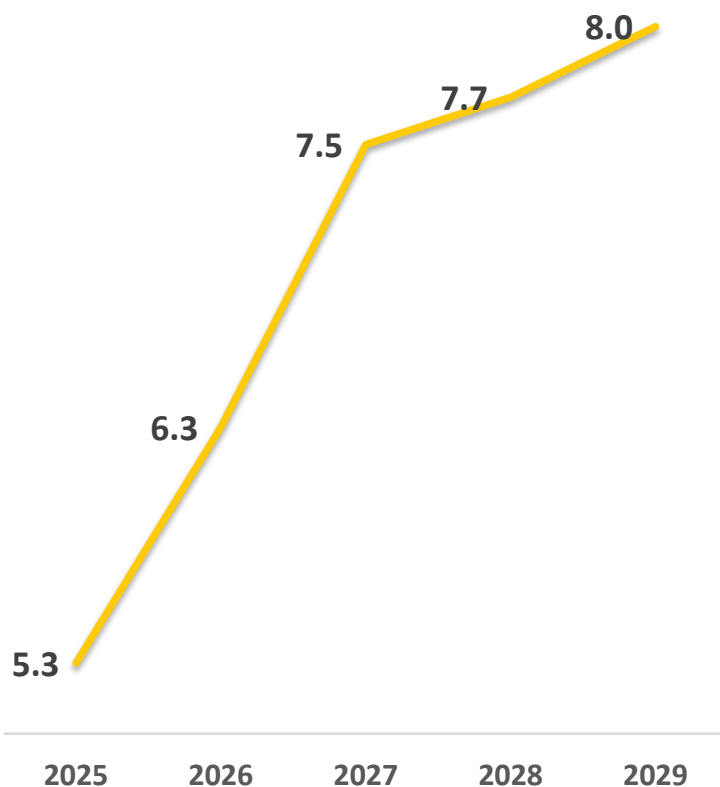


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NATIONAL MEDIUM-TERM PLAN 2025-2029

ECONOMIC GROWTH TARGETED AT 8% BY 2029

GDP Growth Target 2025-2029 (%)



*Source: RPJMN 2025-2029

Strategic Growth-Driving Sectors

- **Services Sector** → supported by financial services, tourism and digitalization
- **Manufacturing Industry** with high added value
- **Agriculture** → supporting food self-sufficiency
- **Construction** → supporting infrastructure development



Policy Focus 2025-2029

1. Agricultural productivity towards **food self-sufficiency**
2. Industrialization (**downstream processing**), labor-intensive, green export-oriented)
3. **Tourism and creative economy**
4. **Blue economy and green economy**
5. **Digital transformation**
6. Investment: FDI and non-state budget investment through **DANANTARA**
7. **Free Nutritious Meals**
8. Construction of **3 Million Houses**

ENABLER: Deregulation and Pro-Growth Fiscal and Monetary Policies



SEZ AS A PROTOTYPE OF STREAMLINED PERMITS AND LICENCING TO ATTRACTING QUALITY INVESTMENT AND DRIVING ECONOMIC GROWTH



Investment Opportunities



as Tenant

- Invest in SEZ Business Sectors (Industry: palm oil, rubber, petrochemical, agro, fishery, manufacturing, logistic, tourism, etc)
- Joint Venture with the SEZ Developer as an Investor



Developer

- Joint Venture with the SEZ Developer in operating and managing SEZ



as Infrastructure Provider

- Invest to provide SEZ Infrastructures:
- On-site infrastructure (power plant, water treatment plant, wastewater treatment plant, etc)
 - Regional infrastructure or supporting infrastructure in the surrounding SEZ (road, port, airport, railway, electricity, water supply, gas, etc)



INDONESIA SEZ INCENTIVES

- As an economic catalyst, the policy for Special Economic Zones (SEZ) seeks to enhance competitiveness by providing optimal facilities that ensure clarity and certainty in implementation at both the central and regional levels.
- With the issuance of the Omnibus Law, adjustments have been made to the technical regulations governing the implementation of fiscal facilities, including taxation, customs, and excise, as well as non-fiscal amenities, as outlined in Government Regulation Number 40 of 2021.

FISCAL INCENTIVES



Income Tax

- Tax Holiday
- Tax Allowance



Value Added Tax (VAT)

VAT is not collected on the delivery of Taxable Goods and Intangible Taxable Goods



Customs and Excise

No Import Tax on imports of Capital Goods and Consumer Goods.



Regional Tax

Reduction of Regional Taxes and/or Regional Levies by 50% to 100%



One Stop Service

All licensing services are managed by the SEZ Administrator to ensure their completion.



Environmental Approval and Building Permits

- Approval of environmental documents from developer
- PBG (Building Permits) is not required as long as the developer has established building guidelines or estate regulations.



Immigration

Special Treatment for Foreign Workers:

- Visa on Arrival (VoA) can be extended up to five times.
- Limited Stay Permits are available for foreigners, their families, and elderly travelers.
- Stay Permits are granted for owners of residences or properties.



Domestic Sales

- No Export Requirement
- Indonesian National Standard (SNI) is not required
- 0% Import Duty for NKL<40%



Land Procurement

- Right of Use for up to 80 years.
- Building Use Rights for up to 80 years.
- Accelerated procedures.



Restricted Import has not been implemented

All goods required for business activities in the Special Economic Zone, except for those that are technically prohibited.



100% FDI

Special arrangements allow for 100% foreign ownership (DNI does not apply in Special Economic Zones).



SPECIAL EMPLOYMENT ARRANGEMENTS


- The term of the RPTKA (foreign workers document) is five years and can be extended.
- There is a Special Tripartite Cooperation Institution in the SEZ.

Indonesia SEZs are established to perform economic functions and provide special facilities and incentives, has contributed to the increased investment and added economic values.

SEZ Total Investment in 2024

 IDR **90,1** Trillion

Workforce Creation

 **47,747**
Labors


Companies Operating in SEZ

 **72**
Tenants in SEZ

SEZ Total Investment until 2024

 IDR **263,4** Trillion

Workforce Creation

 **160,874**
Labors

Companies Operating in SEZ

 **403**
Tenants in SEZ



Kura Kura Bali SEZ

Denpasar City, Bali Province

LOCATION



PROFILE



LEGAL BASIS
Government Regulation (PP)
Number 23 of 2023



DEVELOPER
PT Bali Turtle Island Development



AREA
498Ha

MAIN ACTIVITIES



Tourism



Hotel and Resort



**Educational & Tech Park
Amenities**



**Commercial & Mixed Used
Wellness Center**

REGIONAL INFRASTRUCTURE



21 minutes from Ngurah Rai
International Airport (12 km)



16 minutes from Benoa
Harbour (7,7 km)



Located in main street,
Bypass Ngurah Rai, Sanur

ON-SITE INFRASTRUCTURE



1 Million L Water Reservoir from
PDAM



Electricity Available 20kb – 96,778
MVA



8 KM Road (ROW 29, 18, and 16)



Approx. 10Km Coast Wall



High Speed Internet



2km water canal
5Ha Kura Kura Bali Lake
7 Rain Water Retention Lake



**INDONESIA
SEZ** DEWAN NASIONAL
KAWASAN EKONOMI KHUSUS

Cumulative Achievement



Investment Realization
IDR 905,91 Billion



Workforce Creation
2.048 Labors



Companies Operating in SEZ
2 Tenants in SEZ

Achievement in 2025



Investment Realization
IDR 110 Million



Workforce Creation
665 Labors

*Data as of March 2025

Contribution of Kura Kura Bali SEZ to the Regional Economy for the period January-September 2024:

- New Gross Value Added Creation from SEZs : IDR19,837 billion (with total Provincial GRDP: 220,096 trillion)

*Source: LPEM UI, 2024



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Kura Kura Bali SEZ embraces sustainability as a way of life, not only a commitment with embracing holistic approach, with embracing in aligning their practices with the Sustainable Development Goals (SDGs) to ensure our island embodies environmental responsibility.

The Development of the Bali United in Diversity (UID) Campus

- The Bali UID Campus is the first major infrastructure that demonstrates a strong commitment to driving transformation within the Bali Kura-Kura Special Economic Zone (SEZ).
- UID promotes inclusive growth rooted in the Balinese principle of *Tri Hita Karana*, emphasizing harmony with God, people, and nature, values deeply embedded in its daily practices and educational approach

The Establishment of the Blue Intelligence Resource Unit (BIRU) as a Conservation Initiative

- The Blue Intelligence Resource Unit (BIRU) is envisioned as a strategic hub for advancing marine and environmental conservation efforts in Indonesia and across the Asia-Pacific region.
- Its core objective is to design, promote, and coordinate impactful conservation programs that align with Indonesia's national priorities and contribute to the achievement of the Sustainable Development Goals (SDGs).

Transforming Sustainable Development in the Kura-Kura Bali Special Economic Zone (SEZ)

- The commitment to sustainable development within the Kura-Kura Bali SEZ is reflected through a comprehensive set of strategies designed to foster environmental stewardship, social inclusivity, and long-term economic resilience. Key initiatives include:
 1. Community Engagement and Partnership
 2. Supporting Global Water Diplomacy

LOCATION



PROFILE



LEGAL BASIS
Government Regulation (PP)
Number 41 of 2022



DEVELOPER
PT Hotel Indonesia Natour



AREA
41,26 Ha

MAIN ACTIVITIES



Health Centre (Hospitals)



Hotel and Convention Centre



Ethnomedicinal Botanic Garden



Wellness center

REGIONAL INFRASTRUCTURE



30 minutes from Ngurah Rai
International Airport (16 km)



24 minutes from Benoa
Harbour (12 km)



Located in main street,
Bypass Ngurah Rai, Sanur

ON-SITE INFRASTRUCTURE



Clean Water with the capacity
of 1.430 m3/day



Electricity with the capacity of
18.324 MVA



On-Site Road (2 km)



WWTP on-site with the capacity of
1.143 m3/day

Contribution of Sanur SEZ to the Regional Economy for the period January-September 2024:

- New Gross Value Added Creation from SEZs : 241,051 billion (with total Provincial GRDP: 220,096,614 trillion)

*Source: LPEM UI, 2024

Cumulative Achievement



Investment Realization
IDR 4,42 Trillion



Workforce Creation
3.822 Labors



Companies Operating in SEZ
13 Tenants in SEZ

Achievement in 2025



Investment Realization
IDR 167 Million



Workforce Creation
373 Labors

*Data as of March 2025



The Transformation Towards Sustainability in Sanur SEZ

Sanur SEZ is the first integrated health tourism in Indonesia with the concept of wellness, green, and fully accessible.

Sanur SEZ creates a seamless integration of modern healthcare and traditional healing in the development of **international health tourism**.

- The construction of Bali International Hospital (BIH) with the concept of Green Hospital
- The presence of BIH is able to hold foreign exchange.

The development of **Ethnomedicinal Botanic Garden**

- It is 5,1 hectares green area, known as the hosts thousands of fruit and medicinal plant species.
- Serves as a center for education, biodiversity conservation, and as the green lungs of the area.

Sanur SEZ is **contributing to the development of sustainable infrastructures**, such as:

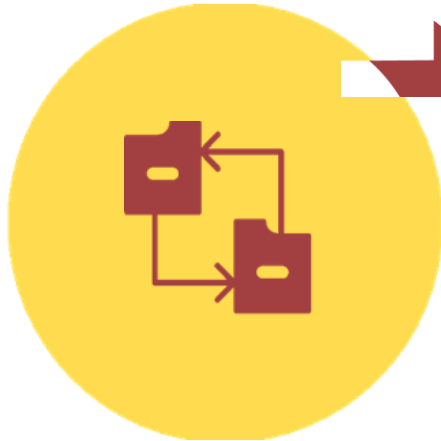
- Integrated Waste Management System (TPPS).
- Waste Water Treatment Plant (WWTP).



INDONESIA SEZ FUTURE DEVELOPMENT



DEVELOP EXPORT ORIENTED PRODUCT AND IMPORT SUBSTITUTION



Down-stream Industries with export oriented, processing of raw materials to increase their added value (processing of mining and agricultural products) as well as expanding into the halal industry sector (halal food, halal tourism, etc).

ACCELERATE INDUSTRIALIZATION 4.0



Automation based Industry

REGIONAL DEVELOPMENT



Develop more SEZs as the center of economic growth across Indonesia to boost regional economy

ACCELERATE THE DEVELOPMENT OF SERVICE AND TERTIERY INDUSTRIES



Information technology industry, financial services, educational services, and medical services

IMPROVE TRADE BALANCE



Import substitution industries such as the chemical, machinery, and electronics industries, bringing world class services sectors to Indonesia such as the education and healthcare sectors to



GREEN SEZs



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INDONESIA
SEZ **DEWAN NASIONAL**
KAWASAN EKONOMI KHUSUS



THANK YOU