



Emerging Issues for Growth

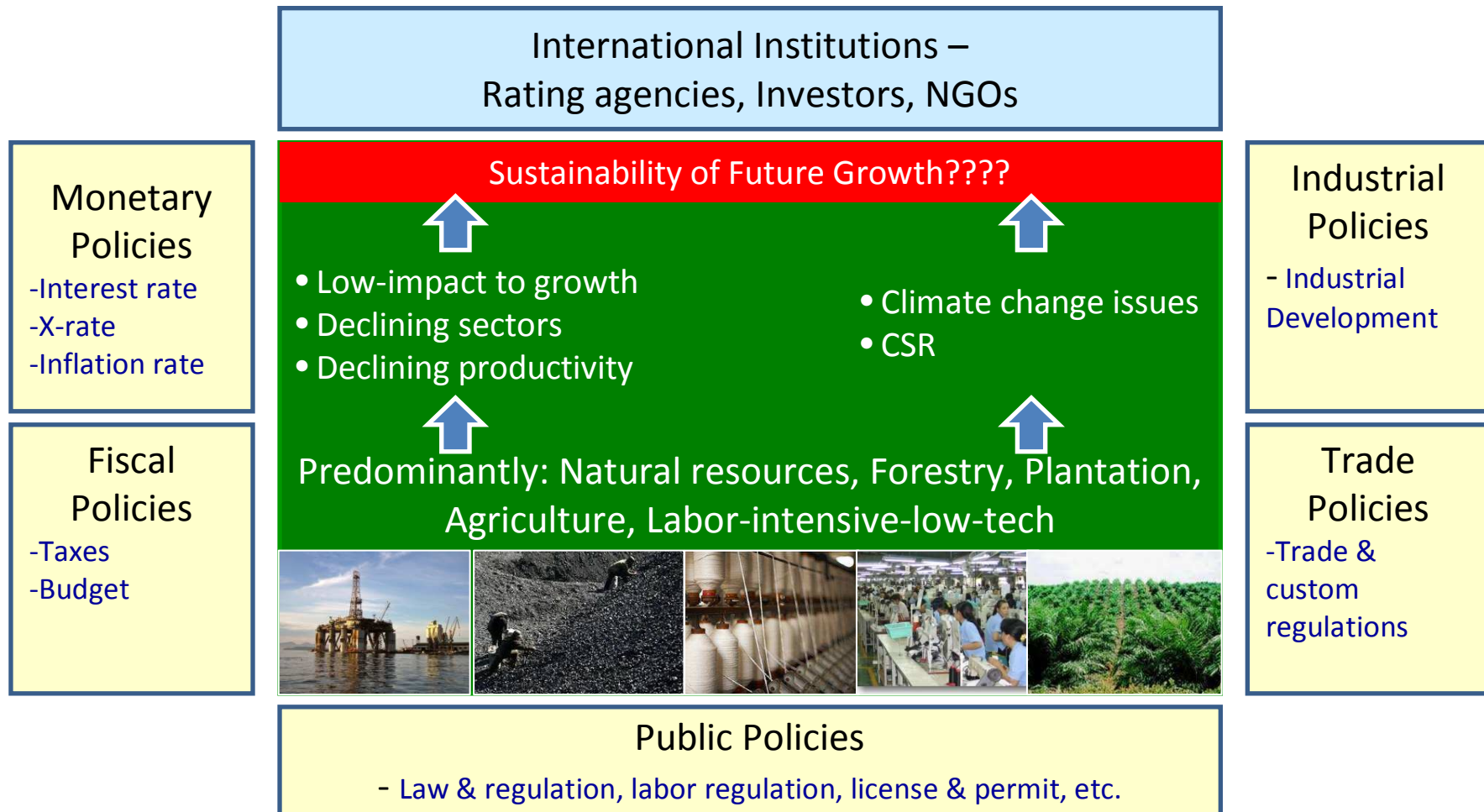


Jakarta, 29th November, 2010
Anthony Budiawan – Elmar Bouma – Micky Hehuwat

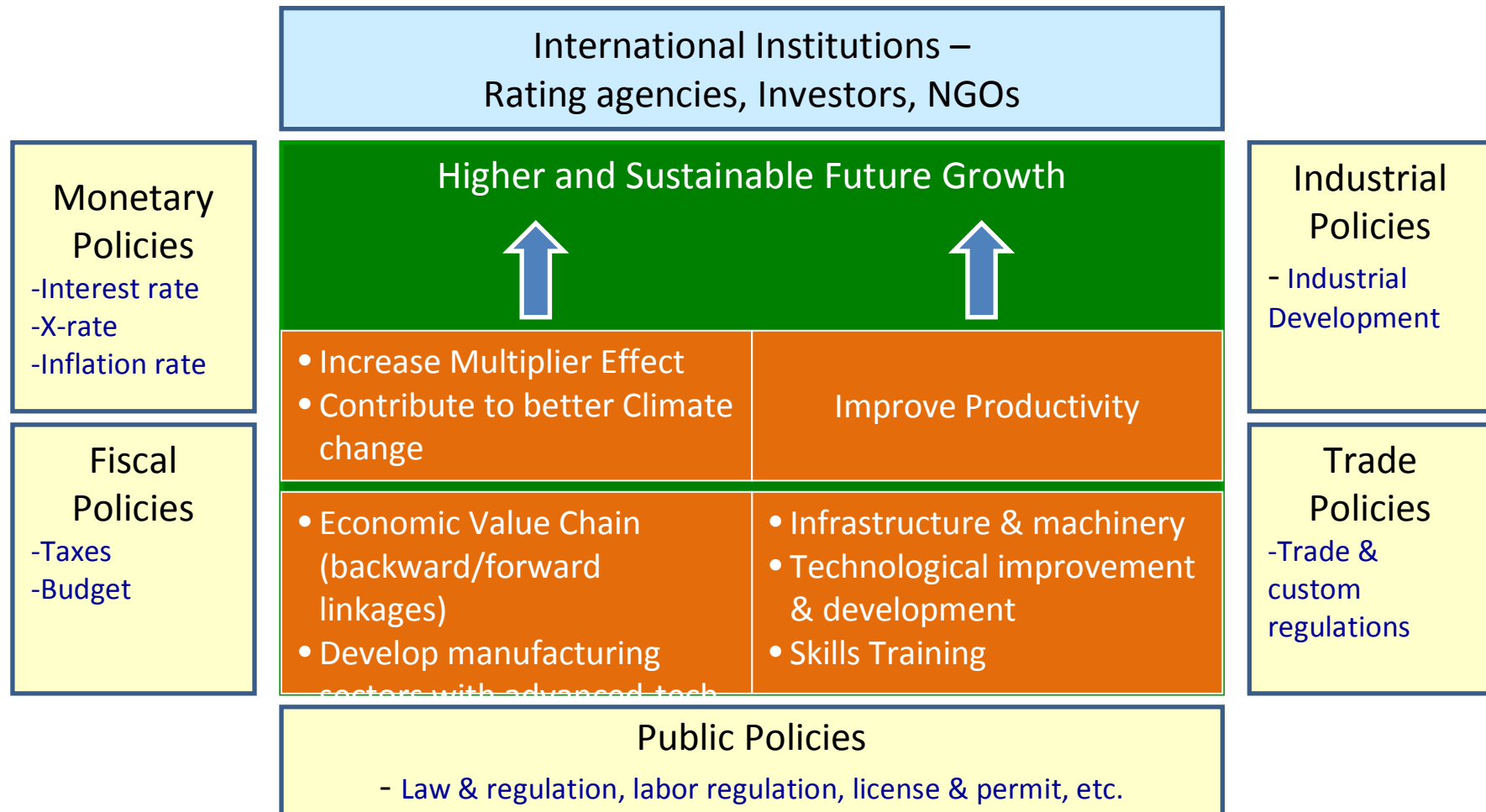
General Economic Structure



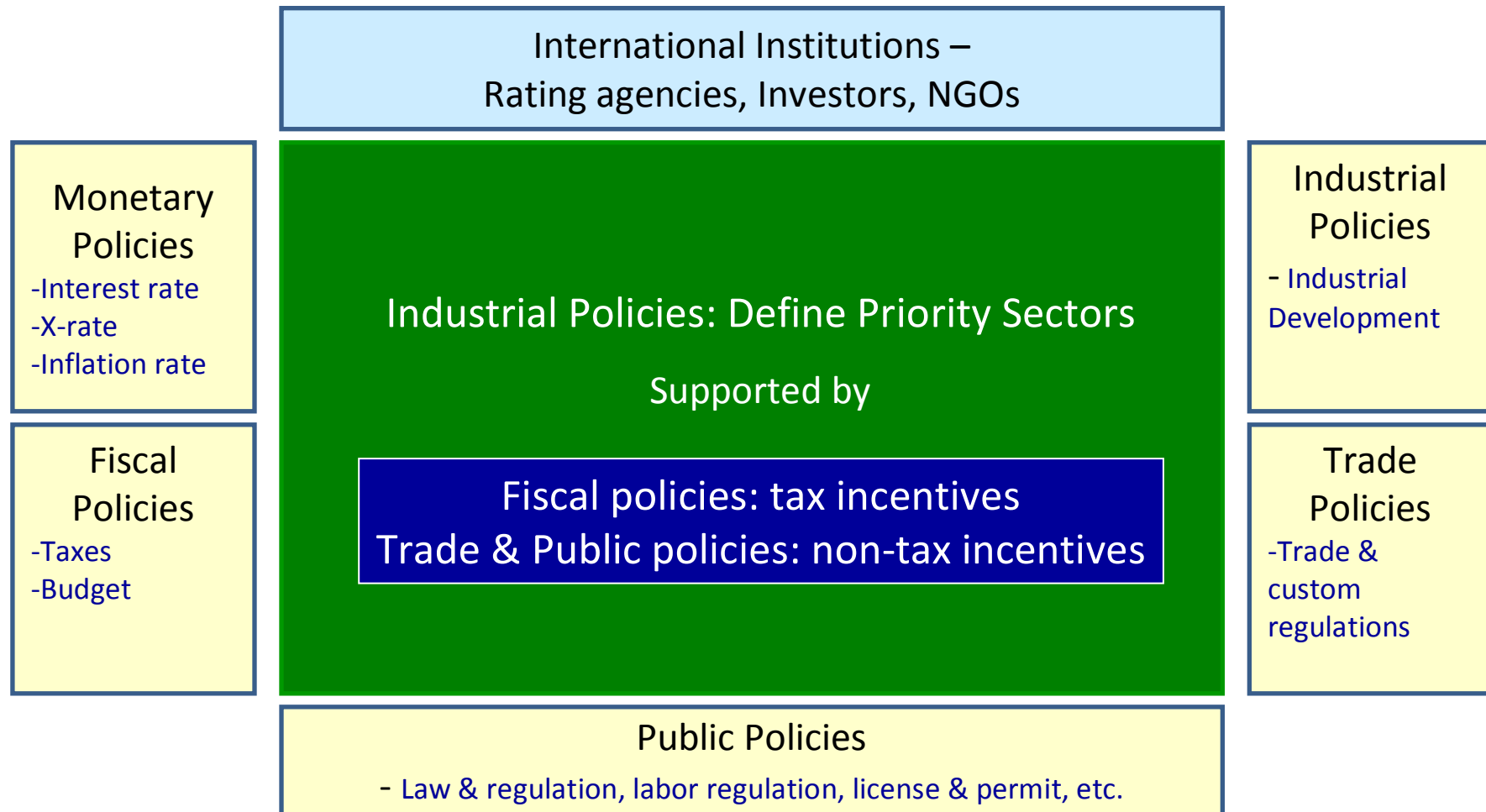
Indonesia's Industry Structure



Sustainable Economic Development



Successful Economic Development



Strategic Investment Promotion Matrix



I N C E N T I V E	Aggressive <small>Med to High</small>	<ul style="list-style-type: none"> Petrochemical Renewable energy –Coal gasification, Biomass, Bio-fuel, Geothermal, Solar, Wind 	<ul style="list-style-type: none"> Machinery Automotive Transport equip. Consumer goods Chemical products Pharmaceutical Steel & basic metal 	<ul style="list-style-type: none"> Infrastructure Construction Real estate Transportation 	<ul style="list-style-type: none"> Improve productivity Increase multiplier effect Converse energy Reduce trade deficit 	
	Develop <small>Low to Med</small>	<ul style="list-style-type: none"> Agriculture, Plantation (Renewable) timber & wooden products 	<ul style="list-style-type: none"> Textile Pulp & paper Mechanized furniture Electronics and electrical products 	<ul style="list-style-type: none"> Wholesale Retail Hotel Restaurant Business Services 		<ul style="list-style-type: none"> Stimulate export Increase domestic market share
	Maintain <small>None to Low</small>	<ul style="list-style-type: none"> Basic refinery, mining and quarrying 	<ul style="list-style-type: none"> Leather, footwear Wearing apparel Livestock & poultry 	<ul style="list-style-type: none"> Financial services 		
Primary		Secondary		Tertiary		
MACROECONOMIC SECTOR`						

Strategic Investment Promotion Matrix



I N C E N T I V E	Aggressive Med to High	<ul style="list-style-type: none"> • Petrochemical • Renewable energy –Coal gasification, Biomass, Bio-fuel, Geothermal, Solar, Wind 	<ul style="list-style-type: none"> • Machinery • Automotive • Transport equip. • Consumer goods • Chemical products • Pharmaceutical • Steel & basic metal 	<ul style="list-style-type: none"> • Infrastructure • Construction • Real estate • Transportation 	Industries in which EU has competitive advantages	
	Develop Low to Med	<ul style="list-style-type: none"> • Agriculture, Plantation • (Renewable) timber & wooden products 	<ul style="list-style-type: none"> • Textile • Pulp & paper • Mechanized furniture • Electronics and electrical products 	<ul style="list-style-type: none"> • Wholesale • Retail • Hotel • Restaurant • Business Services 		<ul style="list-style-type: none"> • Stimulate export • Increase domestic market share
	Maintain None to Low	<ul style="list-style-type: none"> • Basic refinery, mining and quarrying 	<ul style="list-style-type: none"> • Leather, footwear • Wearing apparel • Livestock & poultry 	<ul style="list-style-type: none"> • Financial services 		<ul style="list-style-type: none"> • Create employment • Strengthen (M)SME
		Primary	Secondary	Tertiary		
MACROECONOMIC SECTOR`						