

Особенности социально-экономического развития Индонезии

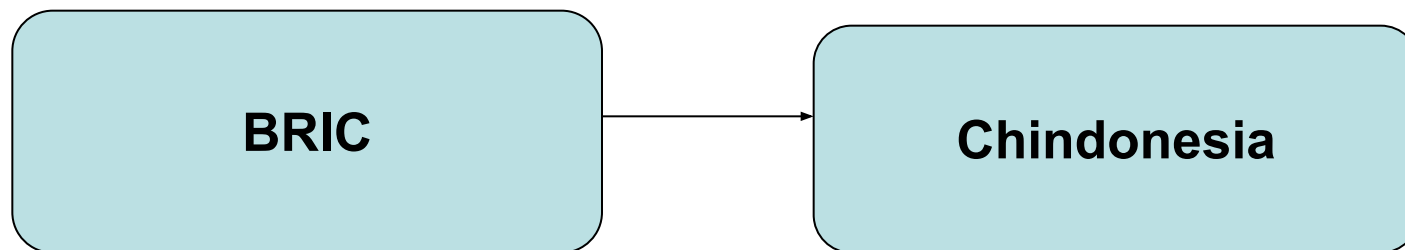


1. Общая характеристика страны
2. Основные макроэкономические показатели.
3. Анализ конкурентоспособности по различным основаниям



Республика Индонезия— крупнейшее государство в Юго-Восточной Азии и 16-е по площади в мире. Расположена на островах Зондского архипелага и является крупнейшим островным государством в мире. С населением около 230 млн. человек занимает четвертое место в мире





Chindonesia (Китай+Индия+Индонезия).

ВВП тройки в этом году достигнет \$6,4 трлн, а к 2015-му — \$10 трлн,.

ВВП в 2008 году (по паритету покупательной способности) — 915 млрд долл. (16-е место в мире).

ВВП на душу населения — 3900 долл. в 2008 году (155-е место в мире).



Отраслевая структура экономики



- добыча и переработка нефти и газа (гл. обр. на экспорт) на Суматре, Яве, Калимантане и в западной части Ириан-Джая.
- Нефтехимическая отрасль контролируется государственной компанией Pertamina.
- Основные промышленные центры: Джакарта, Сурабая, Джокьякарта, Палембанг (нефте- и газопереработка, металлургия, машиностроение, химическая пром-сть и др.).
- 2/3 занятых приходится на пищевую и текстильную промышленность.
- Основные экспортные культуры: каучуконосы (одно из ведущих мест в мире), кокосовая и масличная пальмы, чай, кофе, табак, какао, перец, агавы (сизаль); пряности — мускатный орех, гвоздика и др.; кора хинного дерева (Индонезия — основной поставщик в мире).
- Главные продовольственные культуры: рис (основной продукт питания населения), кукуруза, батат, арахис, соя.





Основные макроэкономические показатели внешней торговли

- **Экспорт** — 139 млрд долл. в 2011: нефть и газ, древесина, текстиль, каучук.
- **Основные покупатели** — Япония 20 %, США 10 %, Сингапур 9 %.
- **Импорт** — 116 млрд долл. в 2011: машины и оборудование, химикаты, топливо, продовольствие.
- **Основные поставщики** — Сингапур 17 %, Китай 12 %, Япония 12 %.
- **Внешний долг** — 141 млрд долл.
- **Состав экспорта:** нефть и газ, древесина, текстиль и каучук.
- **Состав импорта:** машины и оборудование, химикаты, топливо и продовольствие.



Торгово-экономическое сотрудничество между Республикой Индонезией и Российской Федерацией

- Основными экспортными позициями России, как и в предшествующие годы, остаются:
 - черные и цветные металлы
 - химические товары
 - удобрения
- Важнейшими товарными группами российского импорта из Индонезии является:
 - одежда, обувь и ткани
 - пальмовое масло
 - чай
- Перспективные отрасли и направления двустороннего промышленного и научно-технического сотрудничества:
 - Дистанционное зондирование Земли
 - Электроэнергетика
 - Машиностроение
 - Охрана окружающей среды
 - Освоение мирового океана и совместное мирное использование космоса и космических технологий
 - Судостроение
- Российские компании могут предоставить индонезийским партнерам следующие виды товаров:
 - Энергетическое оборудование
 - Дорожно-строительную технику
 - Текстильное оборудование
 - Горнодобывающее оборудование
 - Нефтегазовое оборудование
- Индонезийские компании могут интересоваться передовые российские технологии, в частности вибросейсмические технологии добычи нефти.

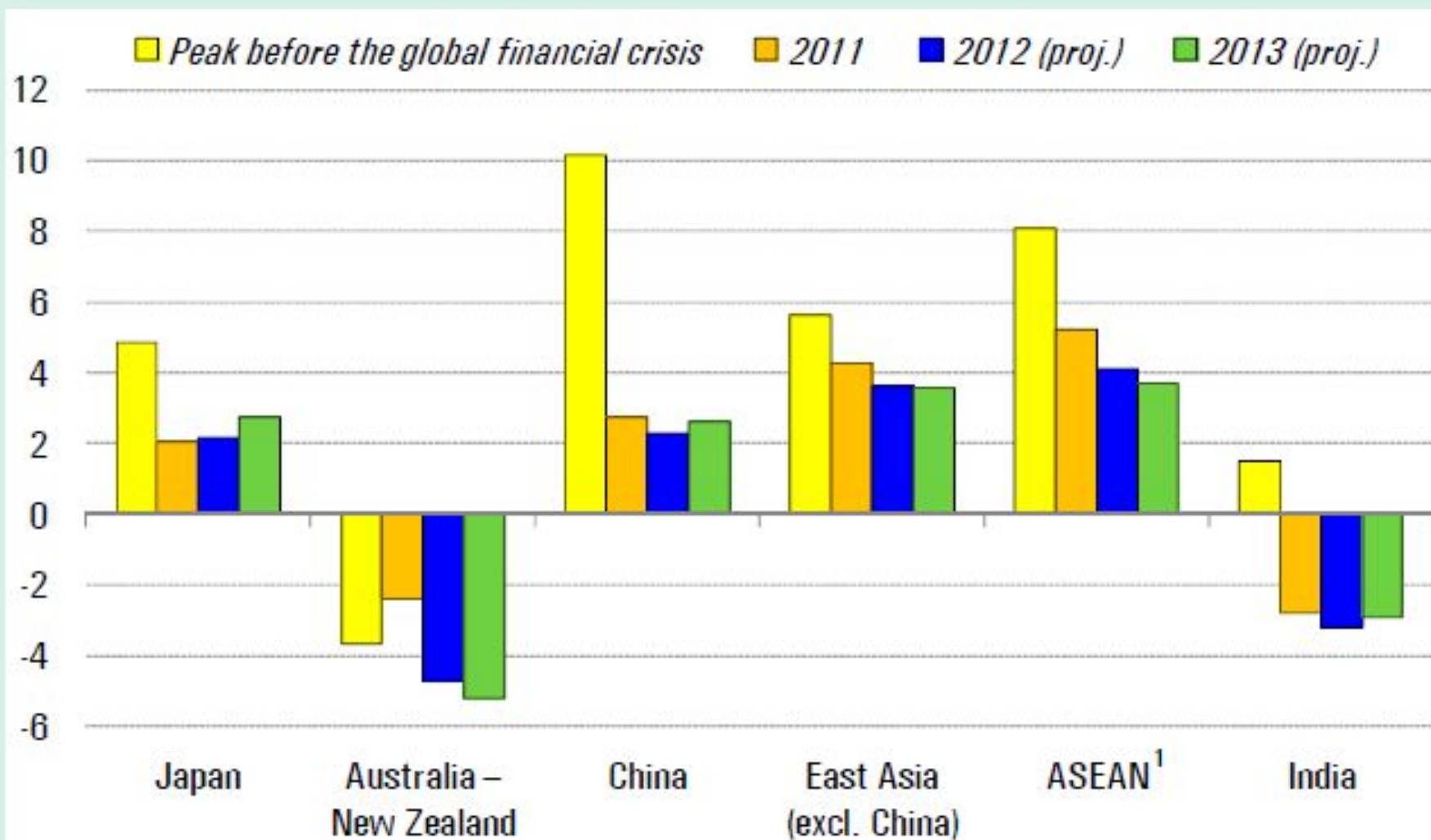
- Перспективами для российского бизнеса являются ключевые экспортные отрасли:
 - Морепродукты
 - Каучук и продукты на его основе
 - Изделия из ткани
 - Одежда
 - Обувь
 - Пальмовое масло
 - Продукты питания
- Инвестиционное сотрудничество фирм и организаций стран целесообразно развивать по следующим наиболее перспективным направлениям:
 - добыча и переработка российского минерального сырья, лесных ресурсов, нефтепродуктов
 - налаживание в Индонезии производства товаров широкого потребления, включая товары длительного пользования
 - сборка дорожно-строительной техники
 - переработка сельскохозяйственной продукции
 - строительство в России административных зданий, жилых комплексов

Table 1.1. Selected Asia: Real GDP*(Year-over-year percent change)*

	Actual data and latest projections			Difference from January 2012 projections	
	2011	2012	2013	2012	2013
Industrial Asia	-0.2	2.2	2.0	0.3	0.0
Australia	2.0	3.0	3.5	0.0	-0.1
Japan	-0.7	2.0	1.7	0.4	0.1
New Zealand	1.4	2.3	3.2	-0.4	-0.2
East Asia	8.2	7.3	8.0	0.1	0.0
China	9.2	8.2	8.8	0.0	0.0
Hong Kong SAR	5.0	2.6	4.2	-0.1	0.2
Korea	3.6	3.5	4.0	0.0	0.0
Taiwan Province of China	4.0	3.6	4.7	0.3	0.3
South Asia	7.1	6.8	7.2	-0.1	0.0
Bangladesh	6.1	5.9	6.4	-0.3	-0.1
India	7.1	6.9	7.3	-0.1	0.0
Sri Lanka	8.2	7.5	7.0	0.5	0.5
ASEAN	4.6	5.2	6.0	0.4	1.0
Brunei Darussalam	1.9	3.2	1.6	0.8	-0.3
Cambodia	6.1	6.2	6.4	-0.3	0.0
Indonesia	6.5	6.1	6.6	0.0	0.0
Lao P.D.R.	8.3	8.4	7.1	0.0	0.0
Malaysia	5.1	4.4	4.7	0.4	0.2
Myanmar	5.5	6.0	5.9	0.3	0.0
Philippines	3.7	4.2	4.7	0.0	0.0

Figure 1.18. Selected Asia: Current Account Balances

(In percent of GDP)

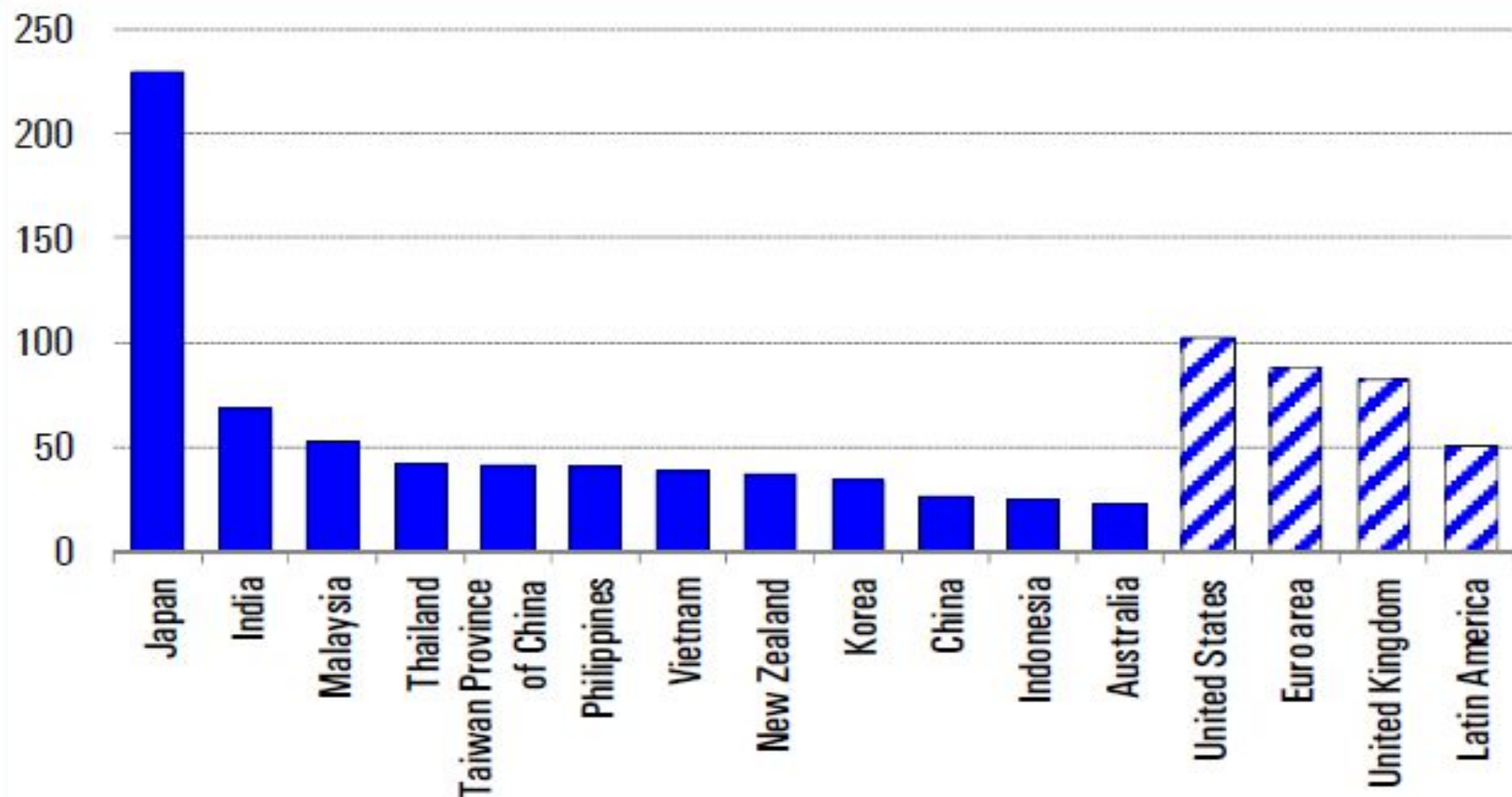


Sources: IMF, WEO database and staff calculations.

¹ ASEAN includes Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam.

Figure 1.29. Gross Public Debt, 2011¹

(In percent of GDP)



Sources: IMF, WEO database and staff calculations.

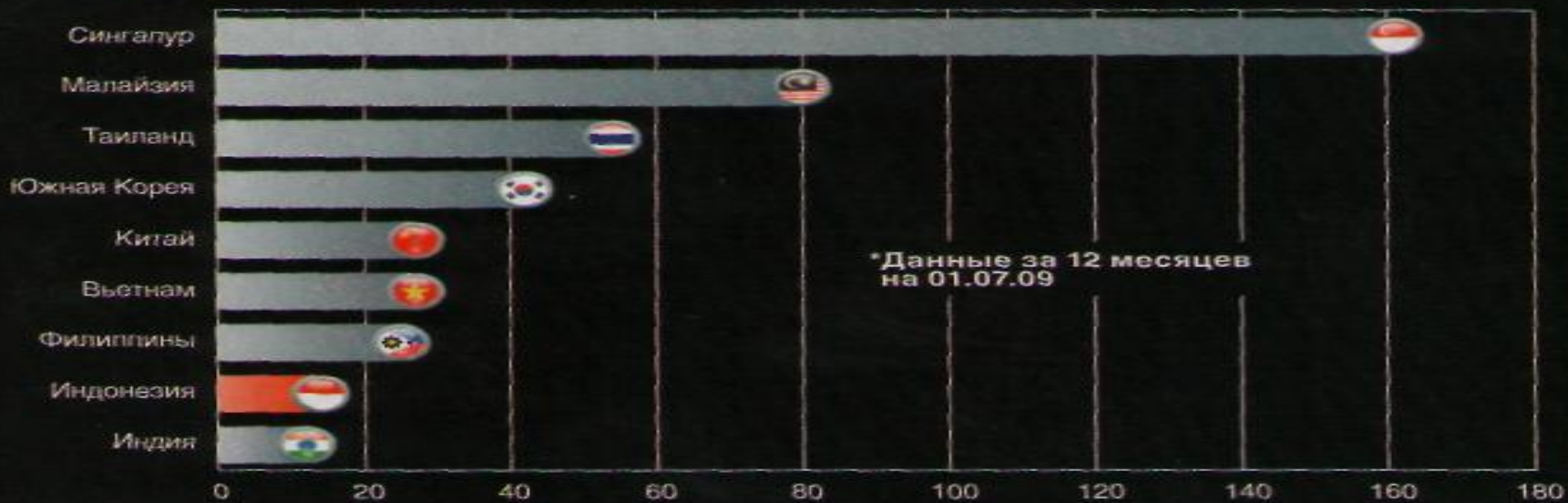
¹ Excludes Singapore and Hong Kong SAR, where public debt arises mainly from non-fiscal operations.

Indonesia Key Economic Indicators

	2008	2009	2010	2011f	2012f
	Year	Year	Year	Year	Year
Output, Employment and Prices					
Real GDP (% change y-y) 1/	6.0	4.6	6.1	6.4	6.7
Domestic demand (% change y-y)	7.5	5.4	5.2	6.5	7.2
Industrial production index (2000=100)	127.2	128.8	132.7	..	..
(% change y-y)	3.0	1.3	4.4	..	..
Unemployment (%)	8.4	7.9	7.1	..	..
Real wages (% change y-y) 2/	-1.9	0.2	..	..	..
Consumer price index (% change y-y)	11.1	2.8	7.0	6.0	6.2
Public Sector					
Government revenues (% GDP)	19.8	15.5	16.0	15.4	15.1
Government expenditures (% GDP)	19.9	17.0	16.6	16.2	16.2
Government balance (% GDP)	-0.1	-1.6	-0.6	-0.9	-1.1
Domestic public sector debt (% GDP)	13.9	16.5	14.1	12.6	11.7
Government debt (% GDP)	29.2	31.1	26.2	23.8	22.1
Foreign Trade, BOP and External Debt					
Trade balance (billions US\$)	22.9	30.1	31.1	46.3	50.3
Exports of goods (billions US\$) 3/	139.6	119.6	158.2	180.8	197.5
(% change y-y)	18.3	-14.3	32.2	14.3	9.2
Key export (% change y-y) 4/	27.5	-35.5	..	..	..
Imports of goods (billions US\$) 3/	116.7	89.5	127.1	134.5	147.2
(% change y-y)	36.9	-27.7	42.0	5.8	9.4
Current account balance (billions US\$)	0.1	10.2	6.3	2.3	2.7
(% GDP)	0.0	1.9	0.9	0.3	0.3
Foreign direct investment (billions US\$)	3.4	2.6	9.8	9.9	10.7
External debt (billions US\$)	155.1	172.9	200.1	..	..
(% GDP)	30.4	32.1	28.1	..	..
Foreign exchange reserves, gross (billions US\$)	51.6	66.1	96.2	..	..
(months of imports of g&s)	4.3	7.1	7.5	..	..



Скромность по-индонезийски
Доля экспорта стран Центральной и Юго-Восточной Азии*, % ВВП



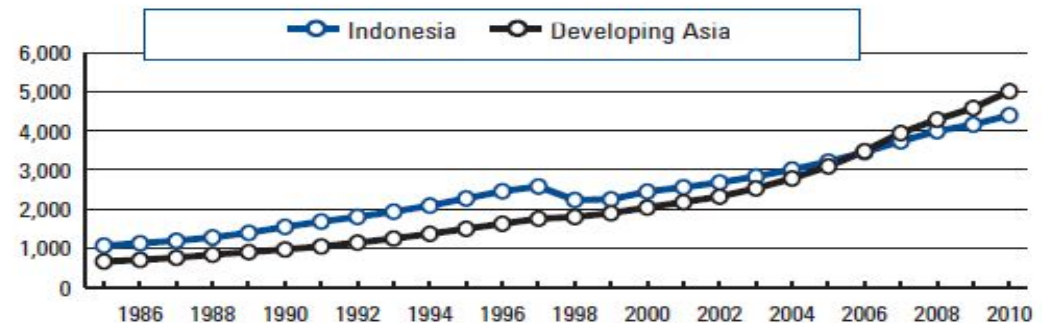
Источник: Всемирный банк

Indonesia

Key indicators, 2010

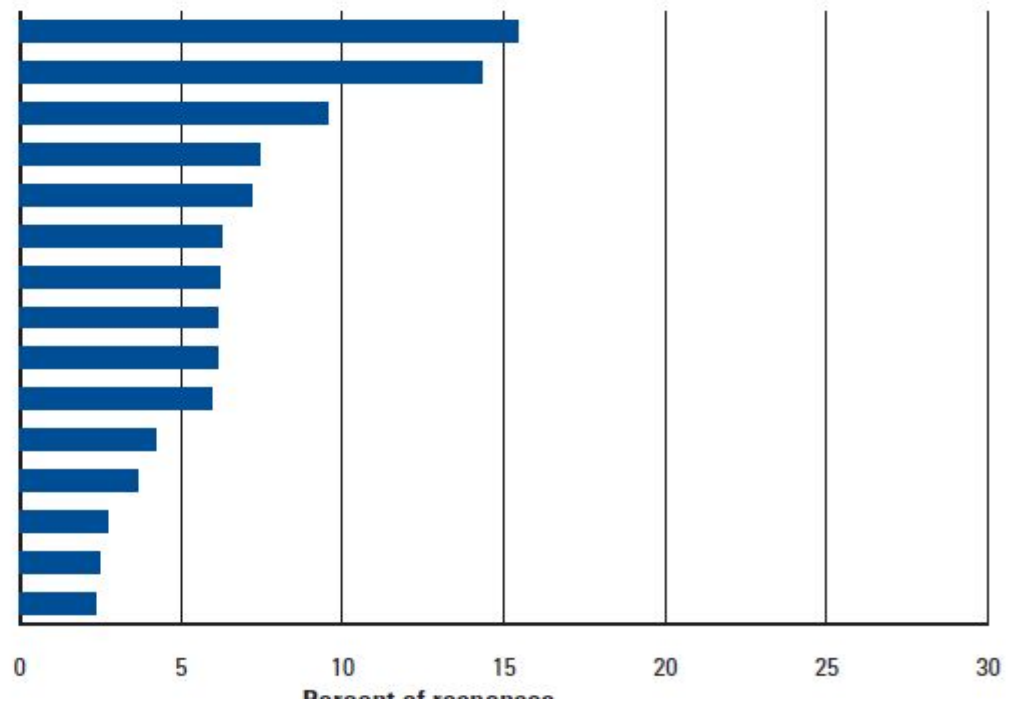
Population (millions).....	232.5
GDP (US\$ billions).....	706.7
GDP per capita (US\$).....	3,015
GDP (PPP) as share (%) of world total.....	1.39

GDP (PPP) per capita (int'l \$), 1985–2010



The most problematic factors for doing business

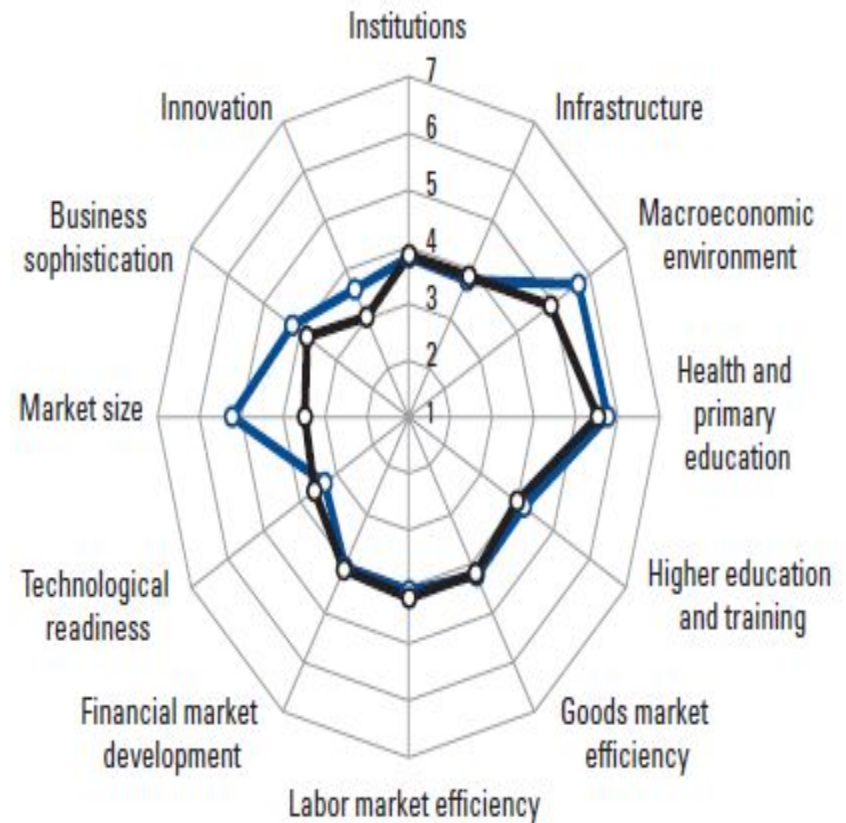
Corruption.....	15.4
Inefficient government bureaucracy.....	14.3
Inadequate supply of infrastructure.....	9.5
Policy instability.....	7.4
Access to financing.....	7.2
Inadequately educated workforce.....	6.3
Poor work ethic in national labor force.....	6.2
Government instability/coups.....	6.1
Inflation.....	6.1
Tax regulations.....	6.0
Tax rates.....	4.2
Restrictive labor regulations.....	3.6
Crime and theft.....	2.7
Poor public health.....	2.5
Foreign currency regulations.....	2.3



Global Competitiveness Index

	Rank (out of 142)	Score (1-7)
GCI 2011-2012	46	4.4
GCI 2010-2011 (out of 139).....	44	4.4
GCI 2009-2010 (out of 133).....	54	4.3
Basic requirements (40.0%)	53	4.7
Institutions.....	71	3.8
Infrastructure.....	76	3.8
Macroeconomic environment.....	23	5.7
Health and primary education.....	64	5.7
Efficiency enhancers (50.0%)	56	4.2
Higher education and training.....	69	4.2
Goods market efficiency.....	67	4.2
Labor market efficiency.....	94	4.1
Financial market development.....	69	4.1
Technological readiness.....	94	3.3
Market size	15	5.2
Innovation and sophistication factors (10.0%)	41	3.9
Business sophistication	45	4.2
Innovation.....	36	3.6

Stage of development



The Global Enabling Trade Report 2012

Reducing Supply Chain Barriers

ROBERT Z. LAWRENCE, MARGARETA DRZENIEK HANOUZ, AND SEAN DOHERTY, EDITORS



Country/Economy	ETI 2012		ETI 2010
	Rank	Score	Rank*
Singapore	1	6.14	1
Hong Kong SAR	2	5.67	2
Denmark	3	5.41	3
Sweden	4	5.39	4
New Zealand	5	5.34	6
Finland	6	5.34	12
Netherlands	7	5.32	10
Switzerland	8	5.29	5
Canada	9	5.22	8
Luxembourg	10	5.20	9
United Kingdom	11	5.18	17
Norway	12	5.17	7
Germany	13	5.13	13
Chile	14	5.12	18
Austria	15	5.12	14
Iceland	16	5.08	11
Australia	17	5.08	15

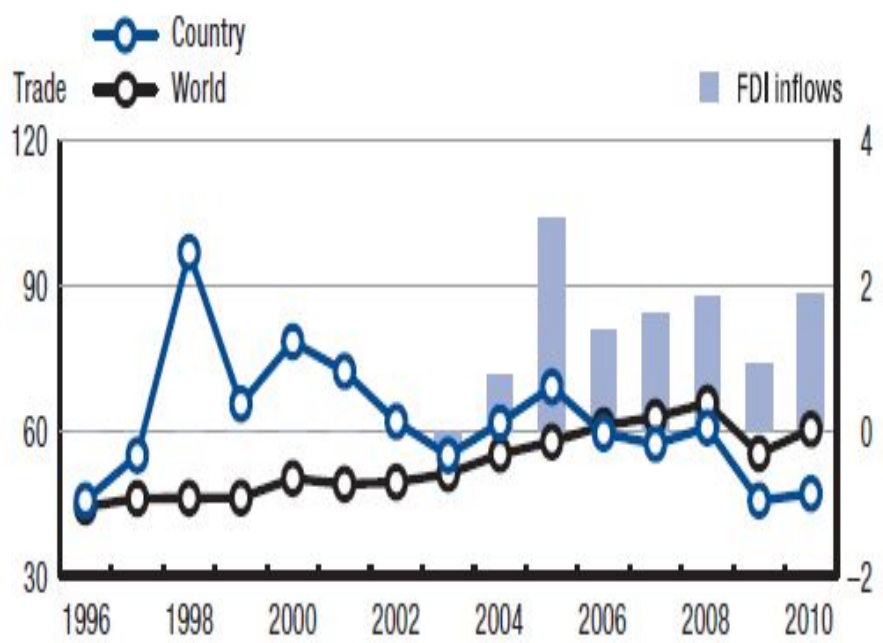
Key indicators

Population (millions), 2010	239.9
GDP (US\$ billions), 2010.....	706.8
FDI inflows (US\$ millions), 2010.....	13,304
Imports and exports as share (%) of world total, 2010.....	0.88

Sources: IMF; UNCTAD; UNFPA; WTO

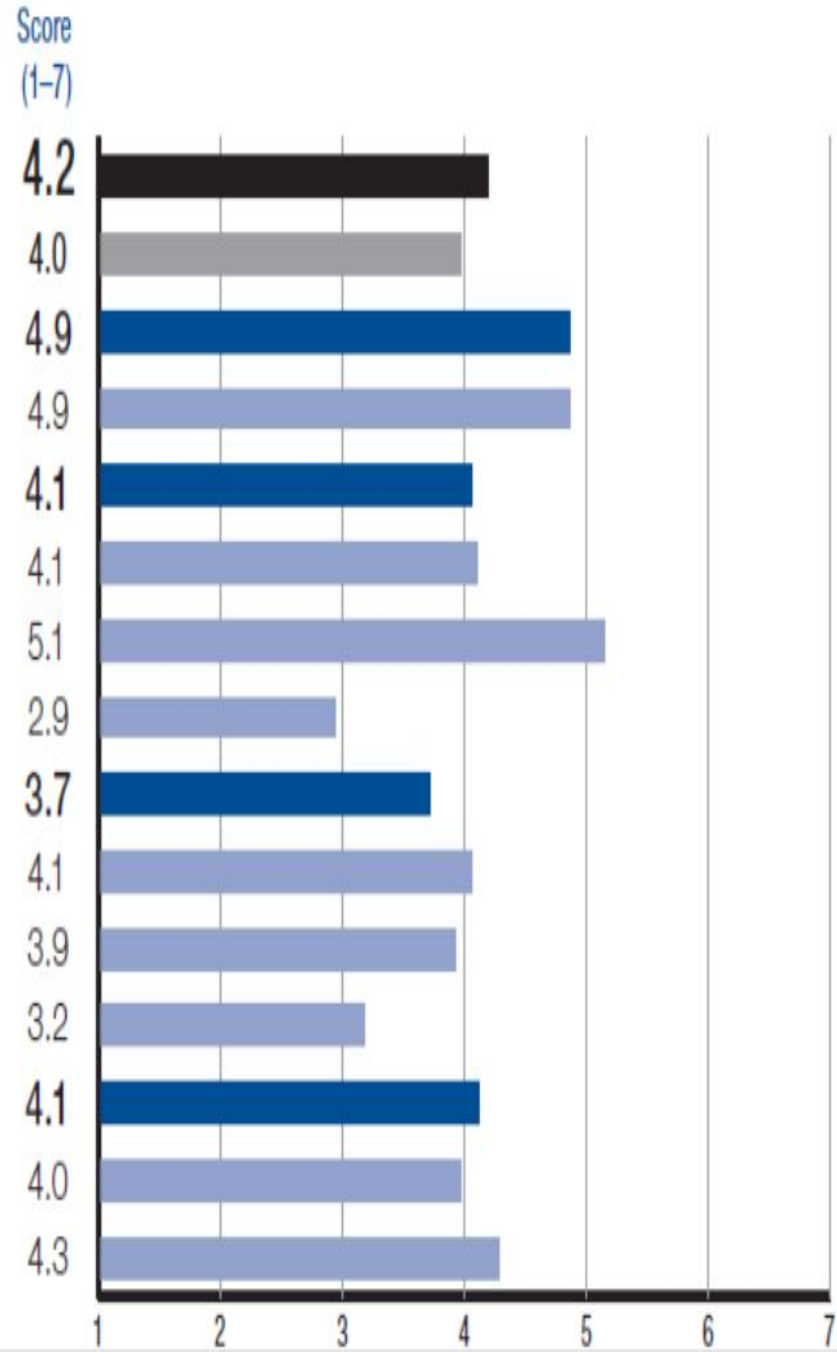
	<u>Imports</u>	<u>Exports</u>
Total trade (US\$ millions), 2010	157,527	174,052
Services trade (US\$ millions), 2010	25,790	16,234
Merchandise trade (US\$ millions), 2010	131,737	157,818
Agriculture (% of merchandise trade), 2010.....	11.87	22.78
Fuels and mining (% of merchandise trade), 2010.....	24.53	39.43
Manufactures (% of merchandise trade), 2010.....	63.59	37.02

Trade and FDI inflows, percent of GDP

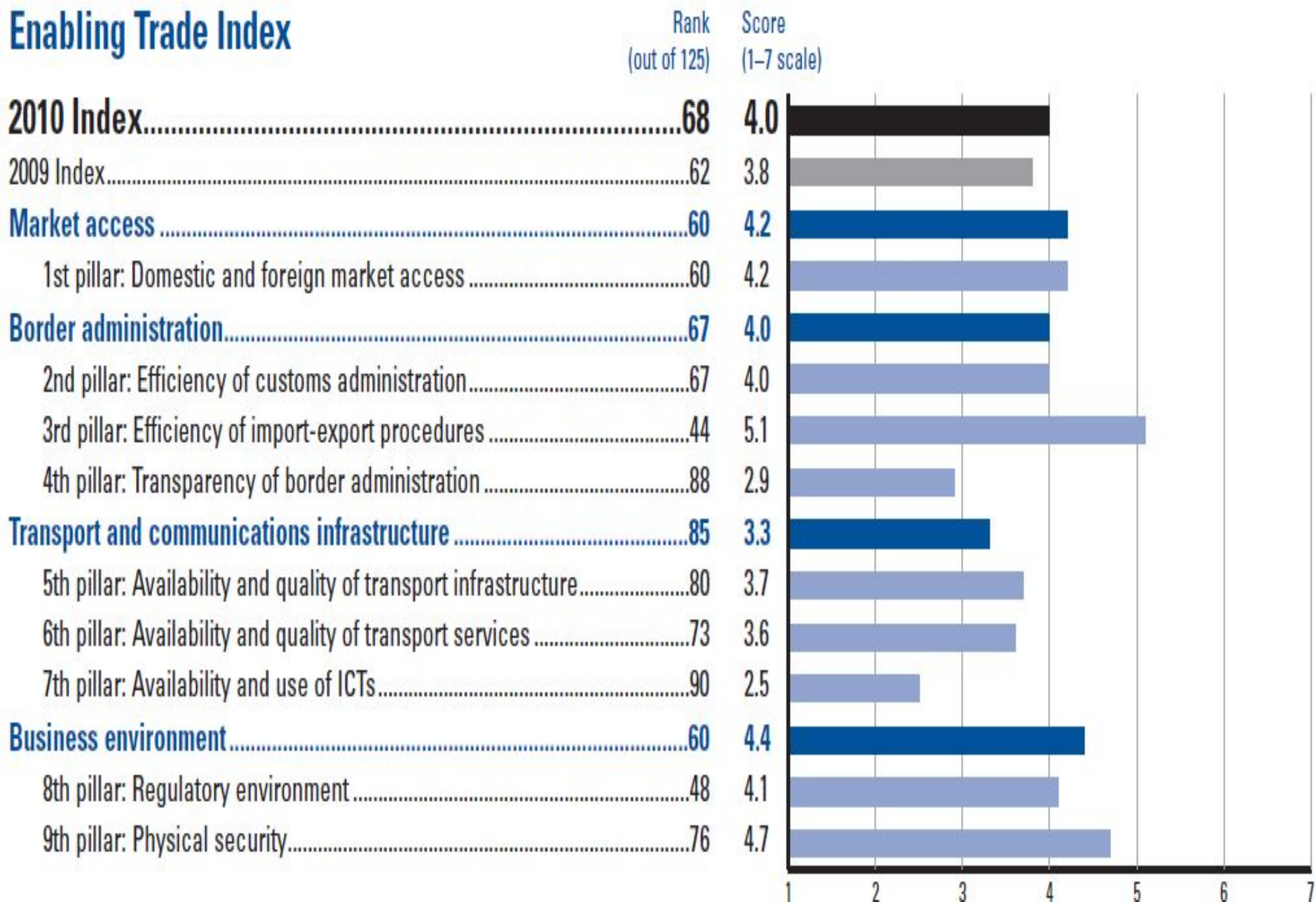


Enabling Trade Index

	Rank (out of 132)
2012 Index	58
2010 Index	68
Subindex A: Market access	17
1st pillar: Domestic and foreign market access	17
Subindex B: Border administration	65
2nd pillar: Efficiency of customs administration.....	69
3rd pillar: Efficiency of import-export procedures	38
4th pillar: Transparency of border administration.....	88
Subindex C: Transport & communications infrastructure	77
5th pillar: Availability and quality of transport infrastructure.....	74
6th pillar: Availability and quality of transport services	50
7th pillar: Availability and use of ICTs	89
Subindex D: Business environment	77
8th pillar: Regulatory environment	49
9th pillar: Physical security.....	91



Enabling Trade Index



The Enabling Trade Index 2010 in detail

■ Competitive Advantage ■ Competitive Disadvantage

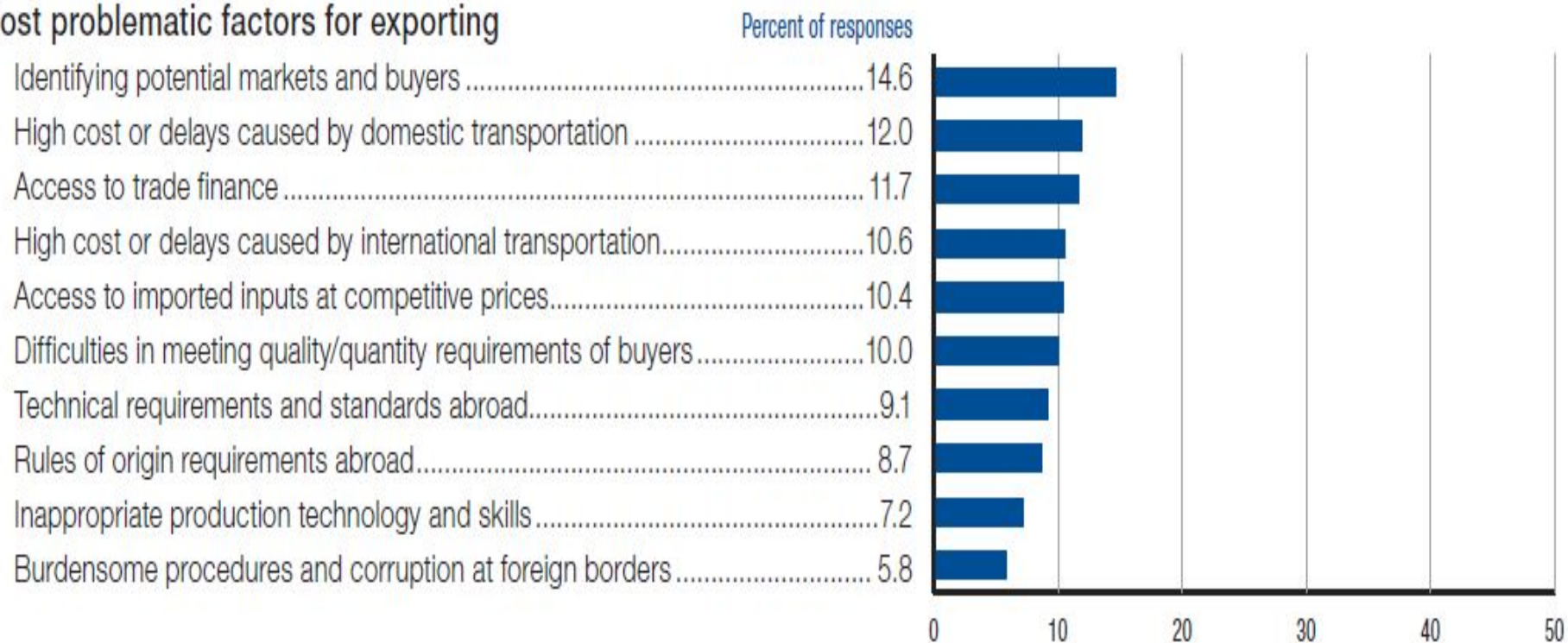
INDICATOR, UNITS		RANK/125	SCORE	BEST PERFORMER	SCORE
1st pillar: Domestic and foreign market access					
1.01	Tariff rate, %	47	■ 3.9	Hong Kong SAR	0.0
1.02	Non-tariff measures, index 0–100 (best)	71	■ 43.3	Uganda	0.1
1.03	Complexity of tariffs, index 1–7 (best)	51	■ 6.4	Hong Kong SAR	7.0
	Tariff dispersion, standard deviation	72	■ 9.1	Hong Kong SAR	0.0
	Tariff peaks, %	58	■ 2.5	Multiple economies	0.0
	Specific tariffs, %	49	■ 0.2	Multiple economies	0.0
	Distinct tariffs, number	57	■ 31	Hong Kong SAR	1
1.04	Share of duty-free imports, %	66	■ 61.0	Hong Kong SAR	100.0
1.05	Tariffs faced, %	58	■ 5.6	Chile	3.7
1.06	Margin of preference in destination markets, index 0–100 (best)	81	■ 14.7	Nepal	97.5

The Enabling Trade Index 2012 in detail

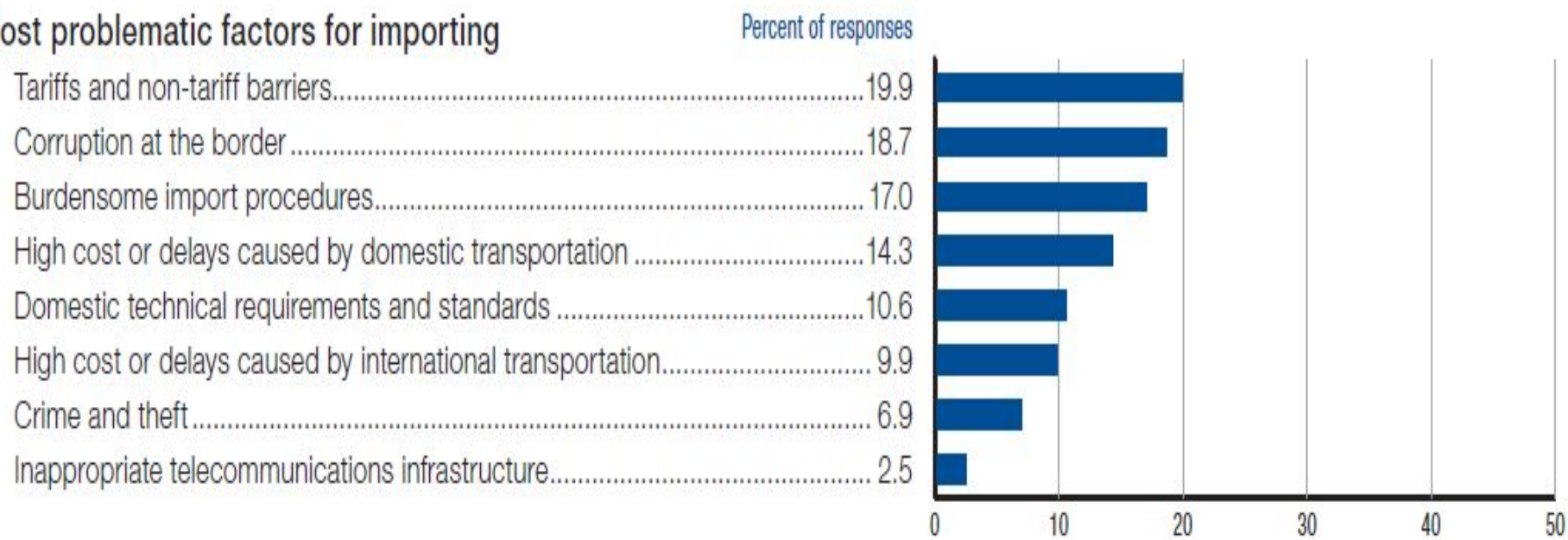
■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR, UNITS		RANK/132	SCORE	BEST PERFORMER	SCORE
1st pillar: Domestic and foreign market access					
		17	4.9	Singapore	6.2
1.01	Tariff rate, (%)	56	■ 4.6	Hong Kong SAR	0.0
1.02	Non-tariff measures, index 0–100 (worst) ¹	19	40.9	Cambodia	4.7
1.03	Complexity of tariffs, index 1–7 (best)	60	■ 6.1	Hong Kong SAR	7.0
	Tariff dispersion, standard deviation	114	■ 13.9	Hong Kong SAR	0.0
	Tariff peaks, %	57	■ 2.3	Multiple economies (23)	0.0
	Specific tariffs, %	72	■ 0.7	Multiple economies (49)	0.0
	Distinct tariffs, number	70	■ 76	Hong Kong SAR	1.0
1.04	Share of duty-free imports, %	72	■ 56.8	Hong Kong SAR	100.0
1.05	Tariffs faced, %	6	■ 4.6	Chile	3.6
1.06	Margin of preference in destination mkts, index 0–100 (best)	86	■ 13.7	Malawi	93.8

Most problematic factors for exporting

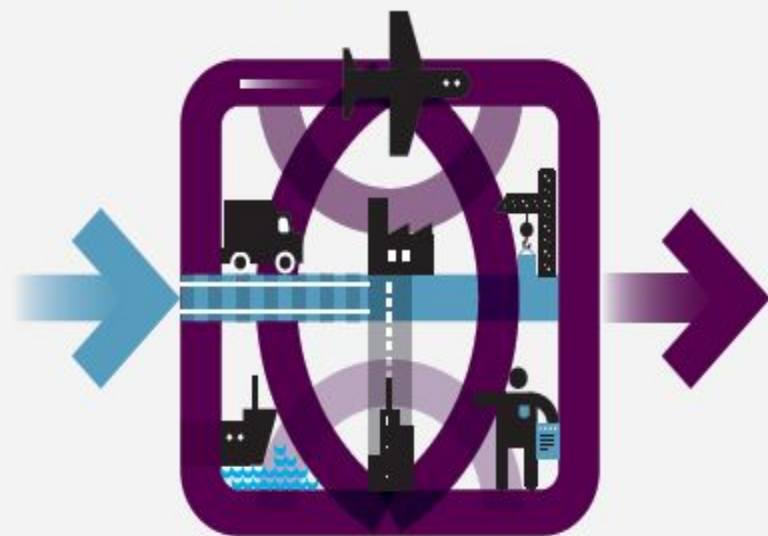


Most problematic factors for importing



Connecting to Compete

Trade Logistics in the Global Economy



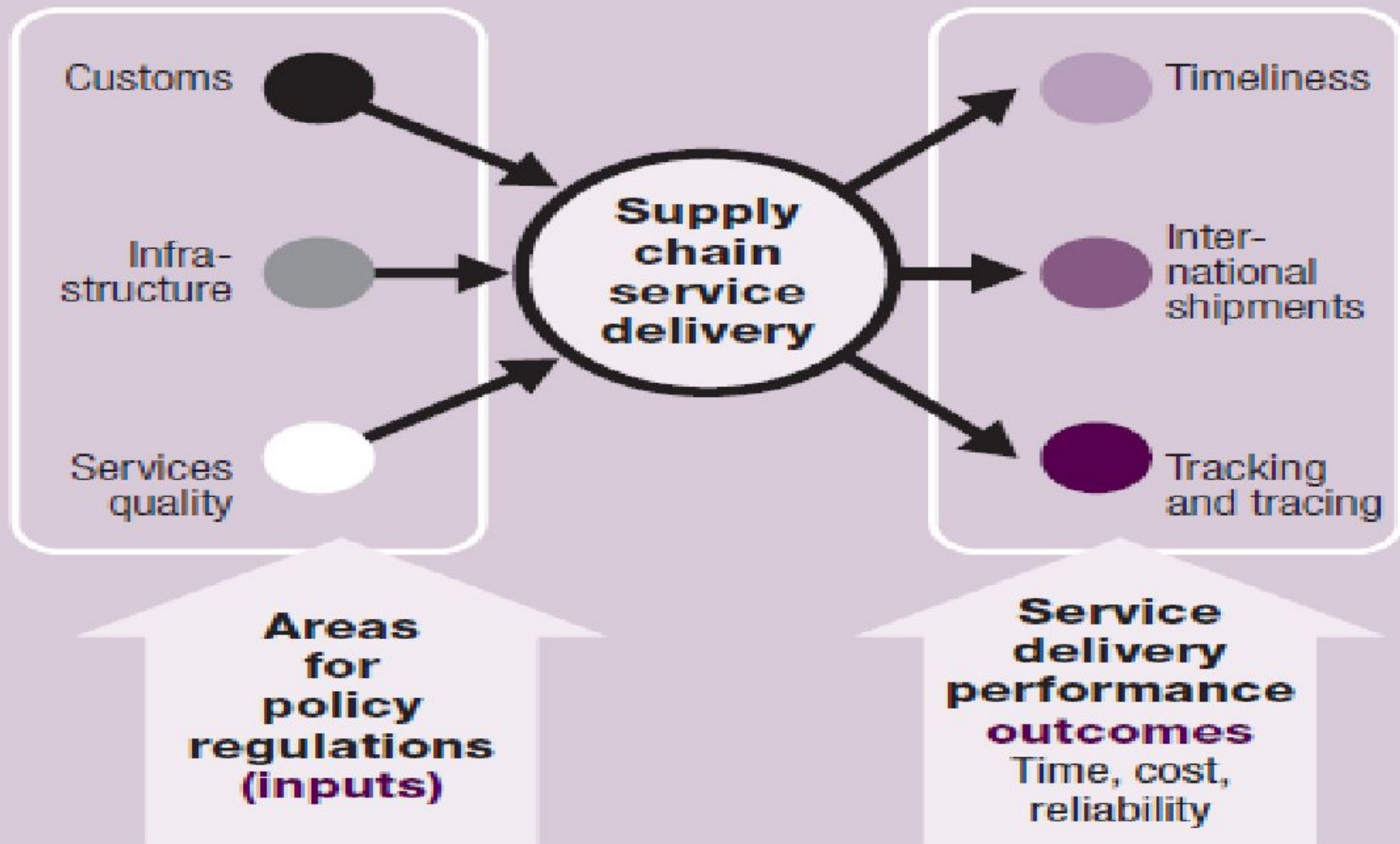
The Logistics Performance Index and Its Indicators

2012

LPI ranking and scores, 2012

Economy	2012 LPI		
	Rank	Score	% of highest performer
Singapore	1	4.13	100.0
Hong Kong SAR, China	2	4.12	99.9
Finland	3	4.05	97.6
Germany	4	4.03	97.0
Netherlands	5	4.02	96.7
Denmark	6	4.02	96.6
Belgium	7	3.98	95.3
Japan	8	3.93	93.8
United States	9	3.93	93.7
United Kingdom	10	3.90	92.7
Austria	11	3.89	92.5
France	12	3.85	91.2
Sweden	13	3.85	91.2
Canada	14	3.85	91.1
Luxembourg	15	3.82	90.3
Switzerland	16	3.80	89.7
United Arab Emirates	17	3.78	88.9

Input and outcome LPI indicators



Source: Authors' analysis.

The distribution of LPI scores is broken down into four categories, used in all editions of *Connecting to Compete*:

- *Logistics unfriendly*—includes countries with severe logistics constraints, such as the least developed countries (bottom LPI quintile).
- *Partial performers*—includes countries with a level of logistics constraints most often seen in low- and middle-income countries (fourth and third LPI quintiles).
- *Consistent performers*—includes countries rated for logistics performance more highly than most others in their income group (second LPI quintile).
- *Logistics friendly*—includes high performers, mostly high-income countries (top LPI quintile).

The World Bank's Logistics Performance Index (LPI) analyzes countries in six components:

1. The efficiency of customs and border management clearance.
2. The quality of trade and transport infrastructure.
3. The ease of arranging competitively priced shipments.
4. The competence and quality of logistics services.
5. The ability to track and trace consignments.
6. The frequency with which shipments reach consignees within scheduled or expected delivery times.

The components were chosen based on recent theoretical and empirical research and on the practical experience of logistics professionals involved in international freight forwarding.

Figure 1.2

LPI component scores, by LPI quintile



Source: Logistics Performance Index 2012.

Table 1.4

The top 10 lower middle-income performers on the 2012 LPI

Economy	2012 LPI			2010 LPI			2007 LPI		
	LPI rank	LPI score	% of highest performer	LPI rank	LPI score	% of highest performer	LPI rank	LPI score	% of highest performer
India	46	3.08	66.4	47	3.12	67.9	39	3.07	64.9
Morocco	50	3.03	65.0	na	na	na	94	2.38	43.4
Philippines	52	3.02	64.8	44	3.14	68.8	65	2.69	52.9
Vietnam	53	3.00	64.1	53	2.96	63.1	53	2.89	59.2
Egypt, Arab Rep.	57	2.98	63.3	92	2.61	51.8	97	2.37	43.0
Indonesia	59	2.94	62.2	75	2.76	56.5	43	3.01	63.0
Yemen, Rep.	63	2.89	60.3	101	2.58	50.8	112	2.29	40.4
Ukraine	66	2.85	59.3	102	2.57	50.6	73	2.55	48.7
Pakistan	71	2.83	58.4	110	2.53	49.1	68	2.62	50.7

	LPI rank		LPI score				% of highest performer	Customs		Infrastructure		International shipments		Logistics quality and competence		Tracking and tracing		Timeliness	
	Rank	Lower bound	Upper bound	Score	Lower bound	Upper bound		Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
	Singapore	1	1	2	4.13	4.06		4.19	100.0	1	4.10	2	4.15	2	3.99	6	4.07	6	4.07	1	4.3
Hong Kong SAR, China	2	1	2	4.12	4.05	4.19	99.9	3	3.97	7	4.12	1	4.18	5	4.08	5	4.09	4	4.2
Finland	3	1	15	4.05	3.81	4.29	97.6	2	3.98	6	4.12	4	3.85	1	4.14	1	4.14	15	4.1
Germany	4	3	7	4.03	3.97	4.09	97.0	6	3.87	1	4.26	11	3.67	4	4.09	7	4.05	2	4.3
Netherlands	5	3	7	4.02	3.94	4.11	96.7	8	3.85	3	4.15	3	3.86	7	4.05	2	4.12	12	4.1
Denmark	6	1	15	4.02	3.82	4.22	96.6	4	3.93	10	4.07	8	3.70	2	4.14	4	4.10	7	4.2
Belgium	7	3	13	3.98	3.85	4.11	95.3	7	3.85	8	4.12	6	3.73	8	3.98	8	4.05	9	4.2
Japan	8	7	11	3.93	3.88	3.99	93.8	11	3.72	9	4.11	14	3.61	9	3.97	9	4.03	6	4.2
United States	9	8	11	3.93	3.88	3.98	93.7	13	3.67	4	4.14	17	3.56	10	3.96	3	4.11	8	4.2
United Kingdom	10	8	14	3.90	3.84	3.96	92.7	10	3.73	15	3.95	13	3.63	11	3.93	10	4.00	10	4.1
Austria	11	3	19	3.89	3.70	4.08	92.5	9	3.77	11	4.05	7	3.71	3	4.10	11	3.97	31	3.7
France	12	10	17	3.85	3.77	3.93	91.2	14	3.64	14	3.96	5	3.73	14	3.82	12	3.97	23	4.0
Sweden	13	5	22	3.85	3.68	4.02	91.2	12	3.68	5	4.13	29	3.39	12	3.90	17	3.82	5	4.2

	LPI							Customs		Infrastructure		International shipments		Logistics quality and competence		Tracking and tracing		Timeliness	
	LPI rank			LPI score			% of highest performer	Customs		Infrastructure		International shipments		Logistics quality and competence		Tracking and tracing		Timeliness	
	Rank	Lower bound	Upper bound	Score	Lower bound	Upper bound		Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Indonesia	59	46	76	2.94	2.78	3.11	62.2	75	2.53	85	2.54	57	2.97	62	2.85	52	3.12	42	3.61
Belarus	91	68	127	2.61	2.38	2.84	51.6	121	2.24	65	2.78	107	2.58	89	2.65	98	2.58	114	2.87
Syrian Arab Republic	92	73	127	2.60	2.39	2.82	51.3	104	2.33	84	2.54	100	2.62	107	2.48	125	2.35	73	3.26
El Salvador	93	79	121	2.60	2.44	2.76	51.2	114	2.28	95	2.46	108	2.57	95	2.60	92	2.60	89	3.08
Guinea-Bissau	94	61	139	2.60	2.26	2.93	51.1	90	2.39	73	2.68	103	2.61	98	2.58	97	2.58	128	2.74
Russian Federation	95	88	109	2.58	2.49	2.68	50.7	138	2.04	97	2.45	106	2.59	92	2.65	79	2.76	94	3.02
Lebanon	96	62	139	2.58	2.26	2.90	50.6	124	2.21	102	2.41	85	2.71	119	2.38	91	2.61	86	3.11
Togo	97	68	134	2.58	2.32	2.84	50.5	112	2.29	94	2.46	40	3.13	124	2.29	115	2.46	123	2.77
Central African Republic	98	62	140	2.57	2.25	2.90	50.3	82	2.45	134	2.09	132	2.33	79	2.70	113	2.48	66	3.33



Doing business in a
more transparent world

TABLE 1.1 Rankings on the ease of doing business

DB2012 rank	DB2011 rank ^a	Economy	DB2012 reforms	DB2012 rank	DB2011 rank ^a
1	1	Singapore	0	62	59
2	2	Hong Kong SAR, China	2	63	60
3	3	New Zealand	1	64	70
4	4	United States	0	65	64
5	5	Denmark	1	66	69
6	7	Norway	0	67	71
7	6	United Kingdom	1	68	76
8	15	Korea, Rep.	3	69	91
9	13	Iceland	2	70	67
10	8	Ireland	0	71	73
11	14	Finland	1	72	65
12	10	Saudi Arabia	1	73	68
13	12	Canada	1	74	81
14	9	Sweden	0	75	66
15	11	Australia	1	76	75
16	17	Georgia	4	77	72

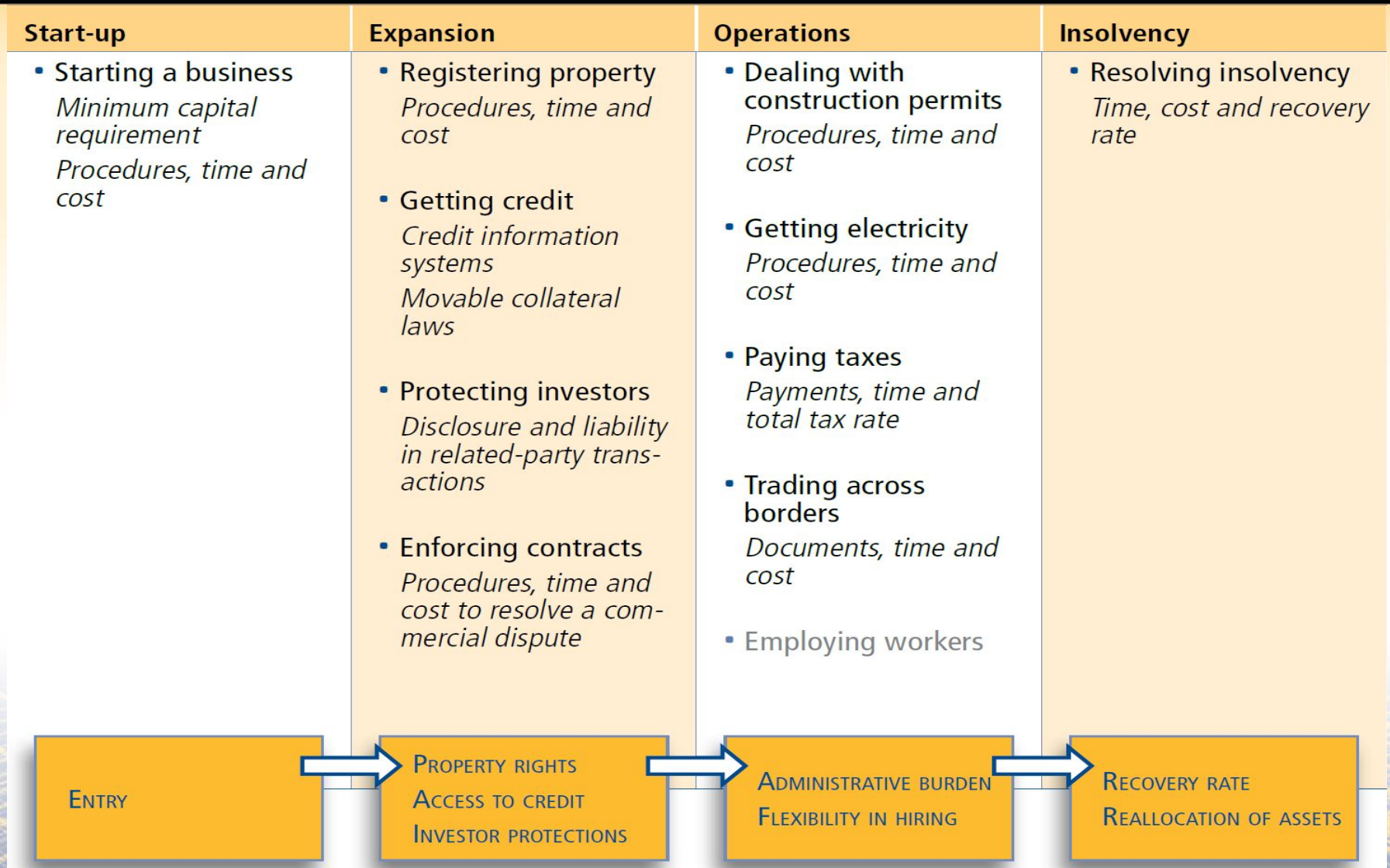
What does *Doing Business* measure?

Doing Business indicators:

- Focus on regulations relevant to the life cycle of a small to medium-sized domestic business.
- Are built on standardized case scenarios.
- Are measured for the largest business city in each country.
- Are focused on the formal sector.

DO NOT measure all aspects of the business environment such as macroeconomic stability, corruption, level of labor skills, proximity to markets, or of regulation specific to foreign investment or financial markets.

Doing Business indicators – 11 areas of business regulation (10 included in the DB2012 ranking)



Six countries in East Asia & Pacific are in the top 30 in the ease of doing business in 2010/11



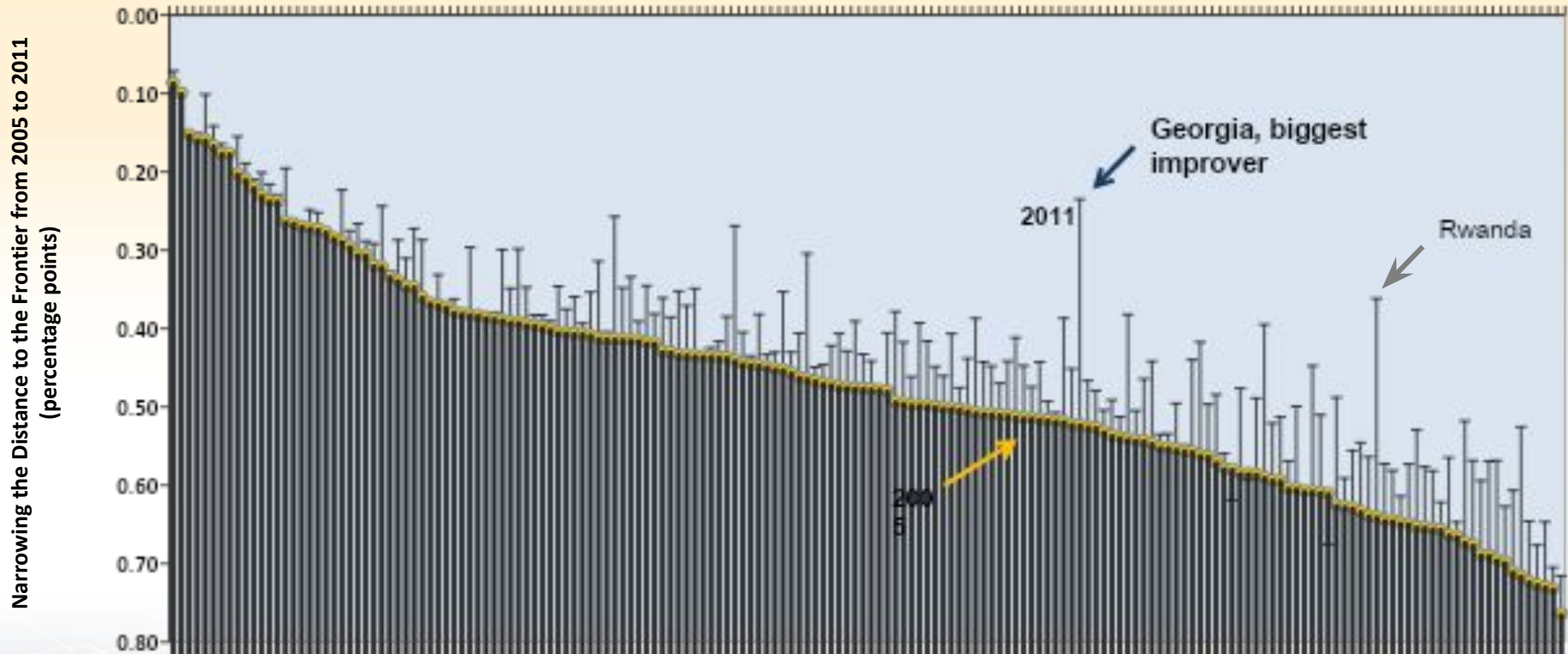
Doing Business in a more transparent world

COMPARING REGULATION FOR DOMESTIC FIRMS IN 183 ECONOMIES

- | | | | |
|---|--------------------------------|---|--------------------------|
|  | 1. Singapore |  | 16. Georgia |
|  | 2. Hong Kong SAR, China |  | 17. Thailand |
|  | 3. New Zealand |  | 18. Malaysia |
|  | 4. United States |  | 19. Germany |
|  | 5. Denmark |  | 20. Japan |
|  | 6. Norway |  | 21. Latvia |
|  | 7. United Kingdom |  | 22. Macedonia, FYR |
|  | 8. Korea, Rep. |  | 23. Mauritius |
|  | 9. Iceland |  | 24. Estonia |
|  | 10. Ireland |  | 25. Taiwan, China |
|  | 11. Finland |  | 26. Switzerland |
|  | 12. Saudi Arabia |  | 27. Lithuania |
|  | 13. Canada |  | 28. Belgium |
|  | 14. Sweden |  | 29. France |
|  | 15. Australia |  | 30. Portugal |
| | |  | 129. Indonesia |

New metric on 'distance to the frontier': tracking economies' progress over time

Distance to Frontier, 2005-2011



...captures the absolute improvement that countries have made over time, and ...also provides information on how far countries have been away from the "frontier" – a measure based on the most efficient business regulatory practices observed by the Doing Business Project across countries and over time.



Economy Profile:
Indonesia

Doing business in a
more transparent world

COMPARING REGULATION FOR DOMESTIC FIRMS IN 183 ECONOMIES



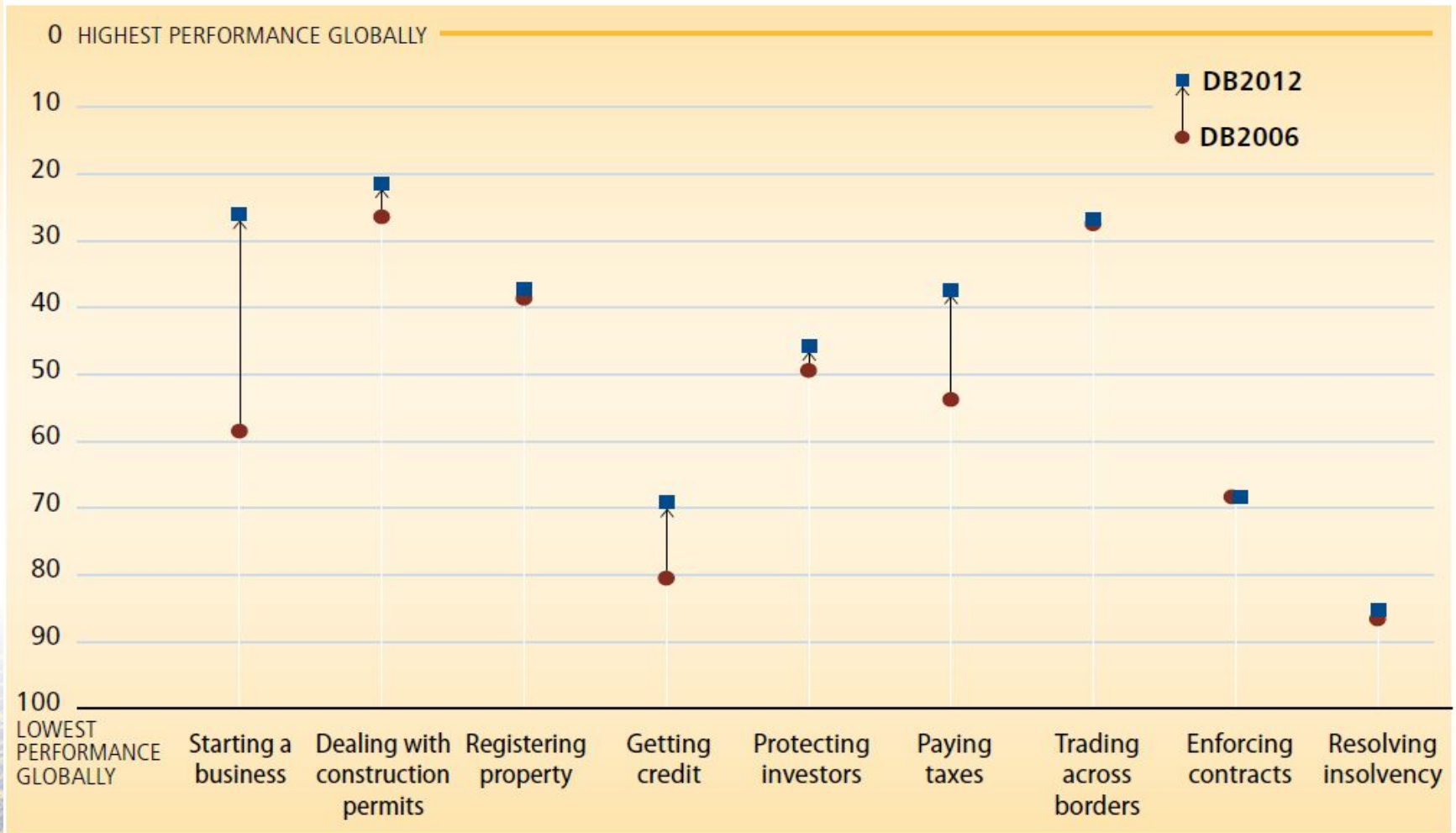
Doing business in
Indonesia 2012

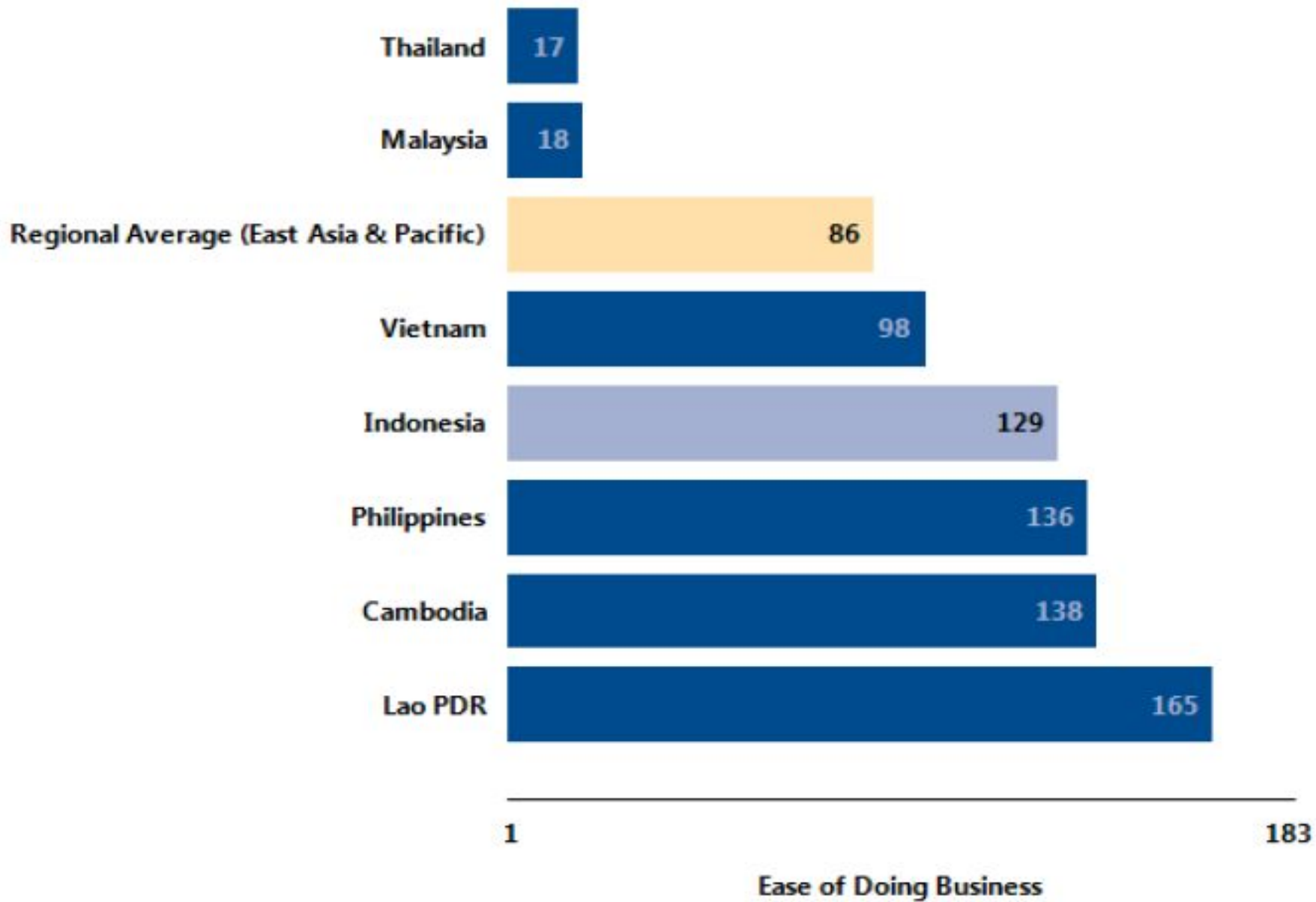
COMPARING REGULATION FOR DOMESTIC FIRMS IN 20 CITIES AND WITH 183 ECONOMIES

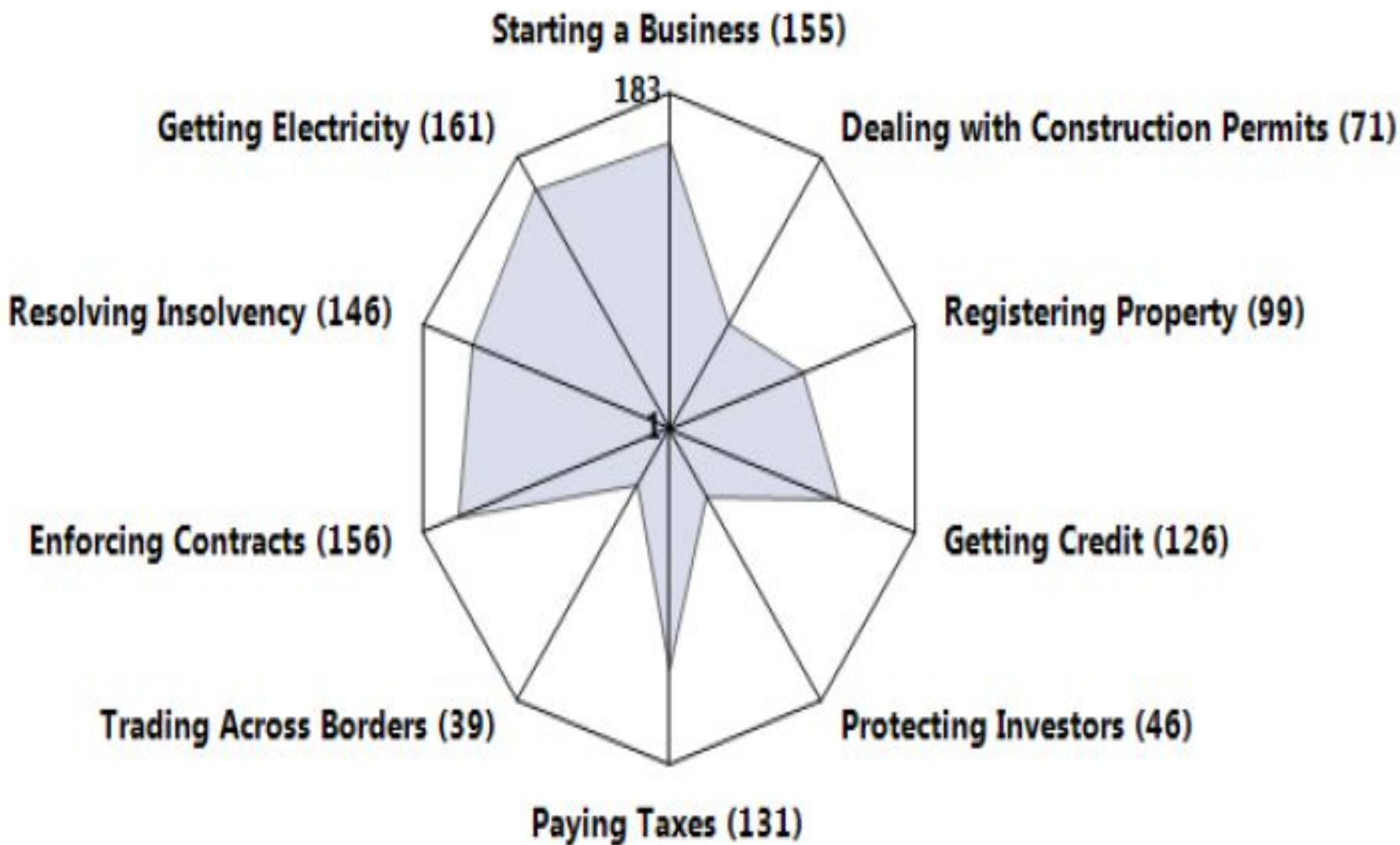
INDONESIA		East Asia & Pacific		GNI per capita (US\$)	2,580
Ease of doing business (rank)	129	Lower middle income		Population (m)	232.5
✓ Starting a business (rank)	155	Registering property (rank)	99	Trading across borders (rank)	39
Procedures (number)	8	Procedures (number)	6	Documents to export (number)	4
Time (days)	45	Time (days)	22	Time to export (days)	17
Cost (% of income per capita)	17.9	Cost (% of property value)	10.8	Cost to export (US\$ per container)	644
Minimum capital (% of income per capita)	46.6			Documents to import (number)	7
		Getting credit (rank)	126	Time to import (days)	27
Dealing with construction permits (rank)	71	Strength of legal rights index (0-10)	3	Cost to import (US\$ per container)	660
Procedures (number)	13	Depth of credit information index (0-6)	4		
Time (days)	158	Public registry coverage (% of adults)	31.8	Enforcing contracts (rank)	156
Cost (% of income per capita)	105.3	Private bureau coverage (% of adults)	0.0	Procedures (number)	40
				Time (days)	570
✗ Getting electricity (rank)	161	Protecting investors (rank)	46	Cost (% of claim)	122.7
Procedures (number)	7	Extent of disclosure index (0-10)	10		
Time (days)	108	Extent of director liability index (0-10)	5	Resolving insolvency (rank)	146
Cost (% of income per capita)	1,379.0	Ease of shareholder suits index (0-10)	3	Time (years)	5.5
		Strength of investor protection index (0-10)	6.0	Cost (% of estate)	18
				Recovery rate (cents on the dollar)	13.8
		Paying taxes (rank)	131		
		Payments (number per year)	51		
		Time (hours per year)	266		
		Total tax rate (% of profit)	34.5		

Tracking Indonesia's progress over time *Doing Business* 2006-2012: Distance to frontier

Distance to the frontier (percentage points)







Indicator	Indonesia DB2012	Indonesia DB2011	Cambodia DB2012	Lao PDR DB2012	Malaysia DB2012	Philippines DB2012	Thailand DB2012	Vietnam DB2012	Best performer global DB2012
Starting a Business (rank)	155	156	171	89	50	158	78	103	New Zealand (1)
Procedures (number)	8	9	9	7	4	15	5	9	Canada (1)*
Time (days)	45	47	85	93	6	35	29	44	New Zealand (1)
Cost (% of income per capita)	17.9	21.5	109.7	7.6	16.4	19.1	6.2	10.6	Denmark (0.0)*
Paid-in Min. Capital (% of income per capita)	46.6	53.1	31.3	0.0	0.0	5.2	0.0	0.0	82 Economies (0.0)*
Dealing with Construction Permits (rank)	71	71	149	80	113	102	14	67	Hong Kong SAR, China (1)
Procedures (number)	13	13	21	23	22	30	8	10	Denmark (5)
Time (days)	158	158	652	108	260	85	157	200	Singapore (26)*
Cost (% of income per capita)	105.3	120.1	40.6	52.4	7.1	110.5	9.5	109.0	Qatar (1.1)

Indicator	Indonesia DB2012	Indonesia DB2011	Cambodia DB2012	Lao PDR DB2012	Malaysia DB2012	Philippines DB2012	Thailand DB2012	Vietnam DB2012	Best performer globally DB2012
Getting Electricity (rank)	161	158	130	138	59	54	9	135	Iceland (1)
Procedures (number)	7	7	4	5	6	5	4	5	Germany (3)*
Time (days)	108	101	183	134	51	50	35	142	Germany (17)
Cost (% of income per capita)	1379.0	1350.0	3062.5	2381.6	95.5	762.0	77.6	1343.0	Japan (0.0)
Registering Property (rank)	99	96	110	72	59	117	28	47	New Zealand (3)
Procedures (number)	6	6	7	5	5	8	2	4	Portugal (1)*
Time (days)	22	22	56	98	48	39	2	57	Portugal (1)
Cost (% of property value)	10.8	10.9	4.3	1.1	3.3	4.8	6.3	0.6	Slovak Republic (0.0)
Getting Credit (rank)	126	116	98	166	1	126	67	24	United Kingdom (1)*

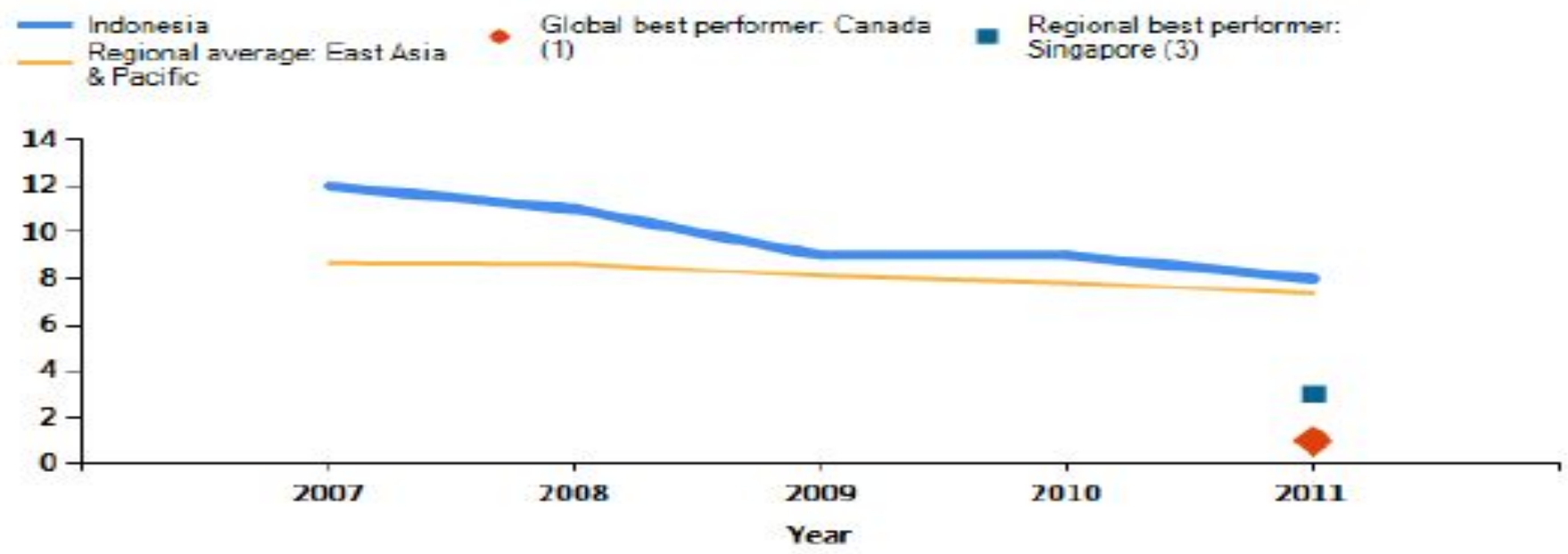
Indicator	Indonesia DB2012	Indonesia DB2011	Cambodia DB2012	Lao PDR DB2012	Malaysia DB2012	Philippines DB2012	Thailand DB2012	Vietnam DB2012	Best performer globally DB2012
Paying Taxes (rank)	131	134	54	123	41	136	100	151	Canada (8)
Payments (number per year)	51	51	39	34	13	47	23	32	Norway (4)
Time (hours per year)	266	266	173	362	133	195	264	941	Luxembourg (59)
Trading Across Borders (rank)	39	38	120	168	29	51	17	68	Singapore (1)
Documents to export (number)	4	4	9	9	6	7	5	6	France (2)
Time to export (days)	17	17	22	44	17	15	14	22	Hong Kong SAR, China (5)*
Cost to export (US\$ per container)	644	644	732	1880	450	630	625	580	Malaysia (450)
Documents to import (number)	7	7	10	10	7	8	5	8	France (2)
Time to import (days)	27	27	26	46	14	14	13	21	Singapore (4)
Cost to import (US\$ per container)	660	660	872	2035	435	730	750	670	Malaysia (435)
Enforcing Contracts (rank)	156	154	142	110	31	112	24	30	Luxembourg (1)

Table 2.1 The ease of starting a business in Indonesia over time

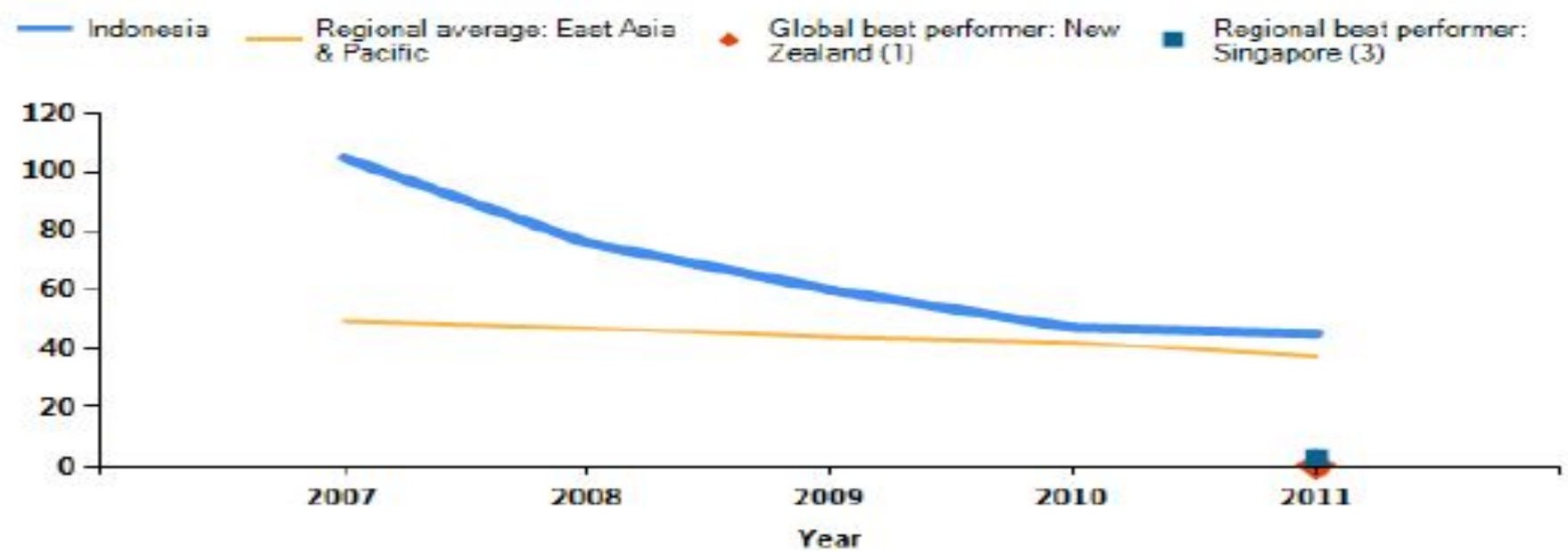
By *Doing Business* report year

Indicator	DB2004	DB2005	DB2006	DB2007	DB2008	DB2009	DB2010	DB2011	DB2012
Rank	..	..	..	..	..	..	..	156	155
Procedures (number)	12	12	12	12	12	11	9	9	8
Time (days)	168	151	151	97	105	76	60	47	45
Cost (% of income per capita)	136.7	130.7	101.7	86.7	80.0	76.7	25.0	21.5	17.9
Paid-in Min. Capital (% of income per capita)	69.1	62.8	48.9	41.7	38.4	74.2	59.7	53.1	46.6

Procedures (number)



Time (days)



DB Year	Reform
DB2012	Indonesia made starting a business easier by introducing a simplified application process allowing an applicant to simultaneously obtain both a general trading license and a business registration certificate.
DB2011	Indonesia eased business start-up by reducing the cost for company name clearance and reservation and the time required to reserve the name and approve the deed of incorporation.
DB2010	The incorporation and post-incorporation processes was eased for new business registration by introducing online services, eliminating certain licenses, making the registry more efficient, and cutting company deed legalization fees, publication fees, registration fees, and business license fees. As a result, 2 procedures and 16 days were cut and the average company start-up cost was reduced by almost 52 percent of gross national income per capita.
DB2009	Business start-up was made faster, but the minimum capital requirement almost doubled.

No.	Procedure	Time to complete	Cost to complete
1	<p>Obtain the standard form of the company deed ; arrange for a notary electronically; obtain clearance for the Indonesian company's name at the Ministry of Law and Human Rights.</p> <p>The uniqueness of the company name must be checked to ensure that it has not been used by another Indonesian company, to avoid a rejection by the Ministry of Justice and Human Rights of the company's deed of establishment and articles of association. Because the process must be done through a computerized processing system, the reservation and clearance must be done by a notary public (because the new computerized system for nontax state revenue payments may be accessed only by a notary public). The reserved name will be blocked for 60 days. If the founding shareholders are confident that the same name has not been used by another Indonesian company, this procedure is not necessary.</p>	4 days	included in procedure 3
2	<p>Notarize company documents before a notary public</p>	4 days	IDR 2526816
3	<p>Pay the State Treasury for the non-tax state revenue (PNBP) fees for legal services at a bank</p> <p>Because the new computerized system for nontax state revenue payments (PNBP)—which has been implemented by the Ministry of Justice and Human Rights—may be accessed only by a notary public, payment for registering or establishing a company is normally easier through the notary.</p> <p>The requirement to pay the non-tax state revenue (PNBP) fee for legal</p>	1 day	IDR 200,000 (name check) + IDR 1,580,000 non-tax state revenue (PNBP) fees for legal services

What do subnational reports add?

- Expand the DB indicators beyond the city measured by DB
- Include rules and regulations at all levels of government
- Give specific locations an opportunity to tell their story
- Provide a tool for locations to compete globally
- Combine media appeal of DB with active participation of subnational governments in the reform process





Doing Business in Indonesia 2010

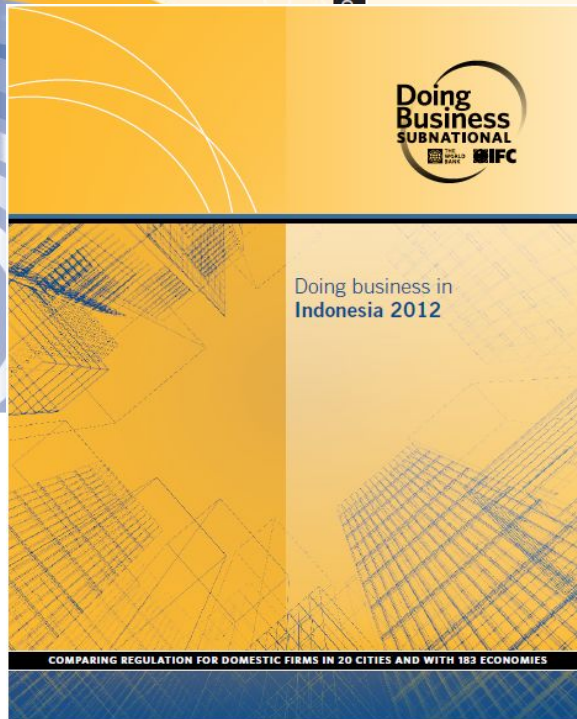
- Created micro-level data for 14 cities in addition to Jakarta

Doing Business in Indonesia 2012

- Updates benchmarks for 14 cities previously measured
- Tracks business reforms in these cities
- Adds 6 new cities
- Data is current as of July 2011

Both reports cover 3 indicators

1. Starting a business
2. Dealing with construction permits
3. Registering property



What are the key findings?

- It is easier to do business in all cities previously measured
-
- **Joint efforts** by the national and local governments lead to time and cost savings for local entrepreneurs
 - **All 14 cities** measured for the second time improved business start-up, while **10 out of 14** improved dealing with construction permits
 - **No city** outperforms the others in all areas
 - **Enforcement** of national regulations **varies** across cities
 - Starting a business and the high cost of transferring property continue to be a **challenge for entrepreneurs**
 - Cities can **learn** from existing **good practices** of their peers across Indonesia and become **more competitive** nationally and globally

Where is it easier to start a business, deal with construction permits and register property?

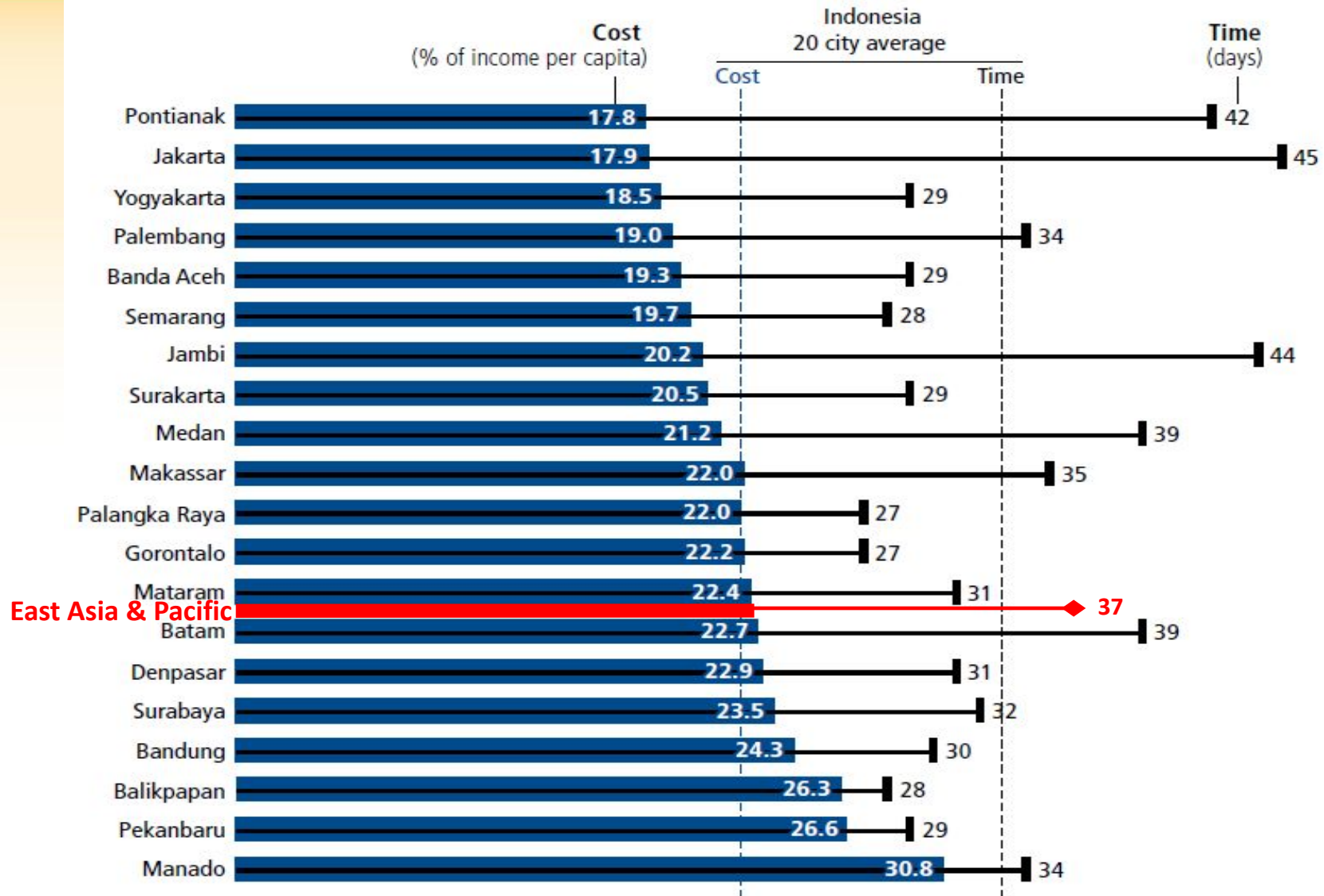
City	Ease of starting a business	Ease of dealing with construction permits	Ease of registering property
Balikpapan	7	1	12
Banda Aceh	5	4	12
Bandung	12	8	1
Batam*	15	10	20
Denpasar	9	17	12
Gorontalo*	6	NO PRACTICE	5
Jakarta	8	19	1
Jambi*	18	2	7
Makassar	17	11	9
Manado	20	18	15
Mataram*	10	12	4
Medan*	19	6	7
Palangka Raya	2	14	16
Palembang	11	3	3
Pekanbaru	16	15	18
Pontianak*	13	7	9
Semarang	4	8	19
Surabaya	14	16	11
Surakarta	3	12	17
Yogyakarta	1	5	6

*Cities not benchmarked in *Doing Business in Indonesia 2010* report.

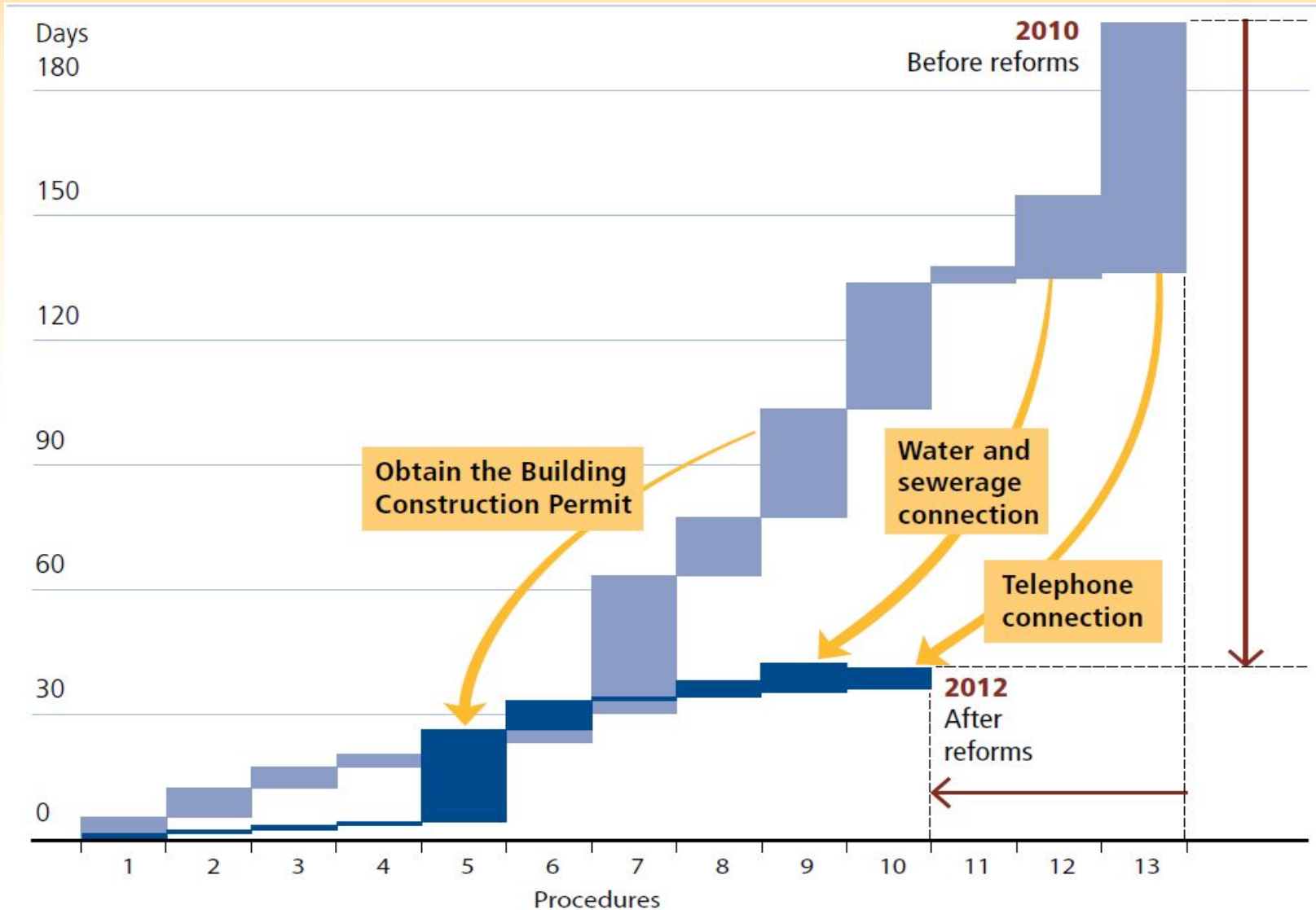
National and local reforms improve starting a business and dealing with construction permits

City	National reforms	Local reforms	
	Starting a business	Starting a business	Dealing with construction permits
Balikpapan	✓	✓	
Banda Aceh	✓	✓	✓
Bandung	✓	✓	✓
Denpasar	✓	✓	
Jakarta	✓	✓	
Makassar	✓	✓	
Manado	✓		✓
Palangka Raya	✓	✓	✓
Palembang	✓	✓	✓
Pekanbaru	✓	✓	✓
Semarang	✓	✓	✓
Surabaya	✓	✓	✓
Surakarta	✓	✓	✓
Yogyakarta	✓		✓

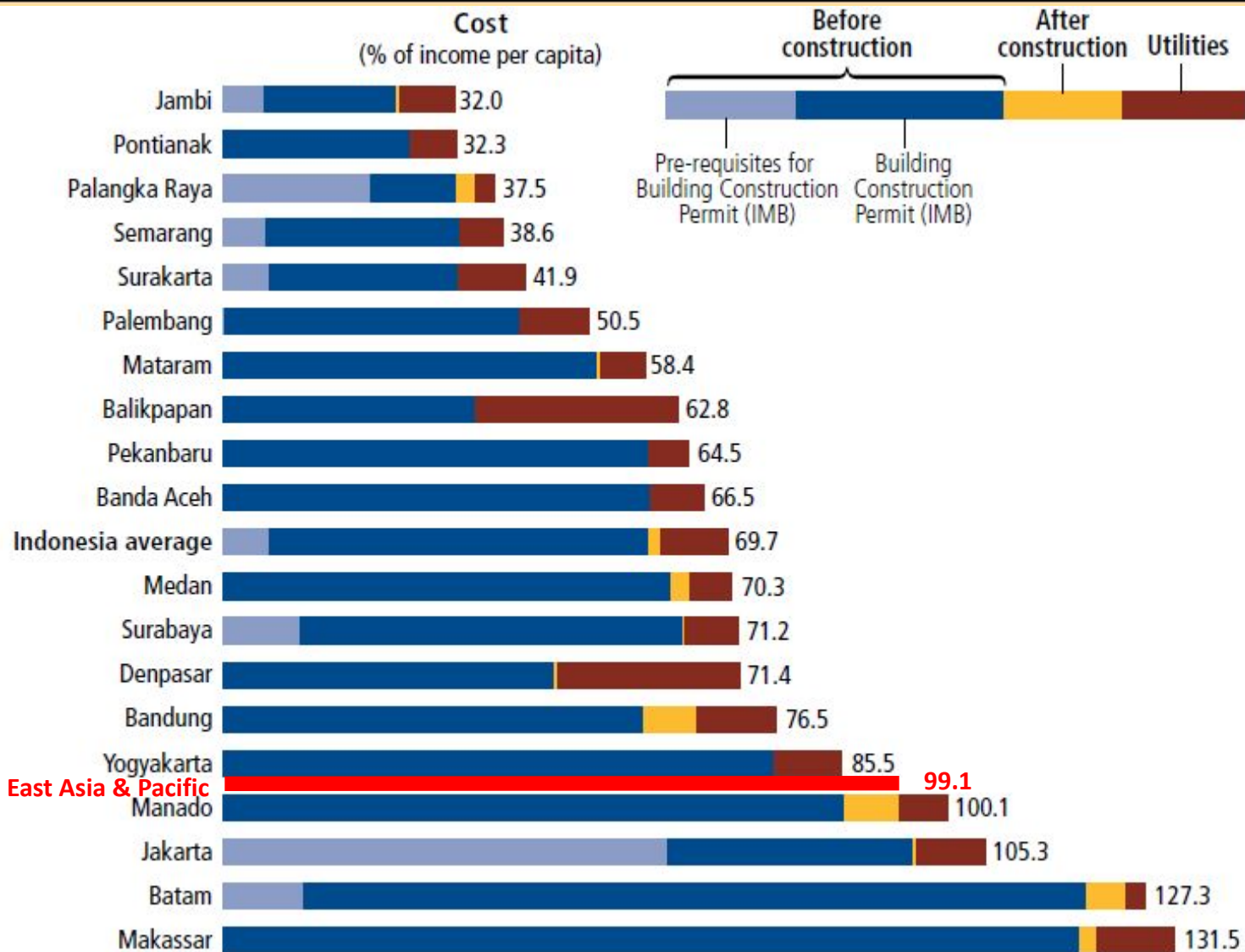
Starting a business is faster in cities with one-stop shops



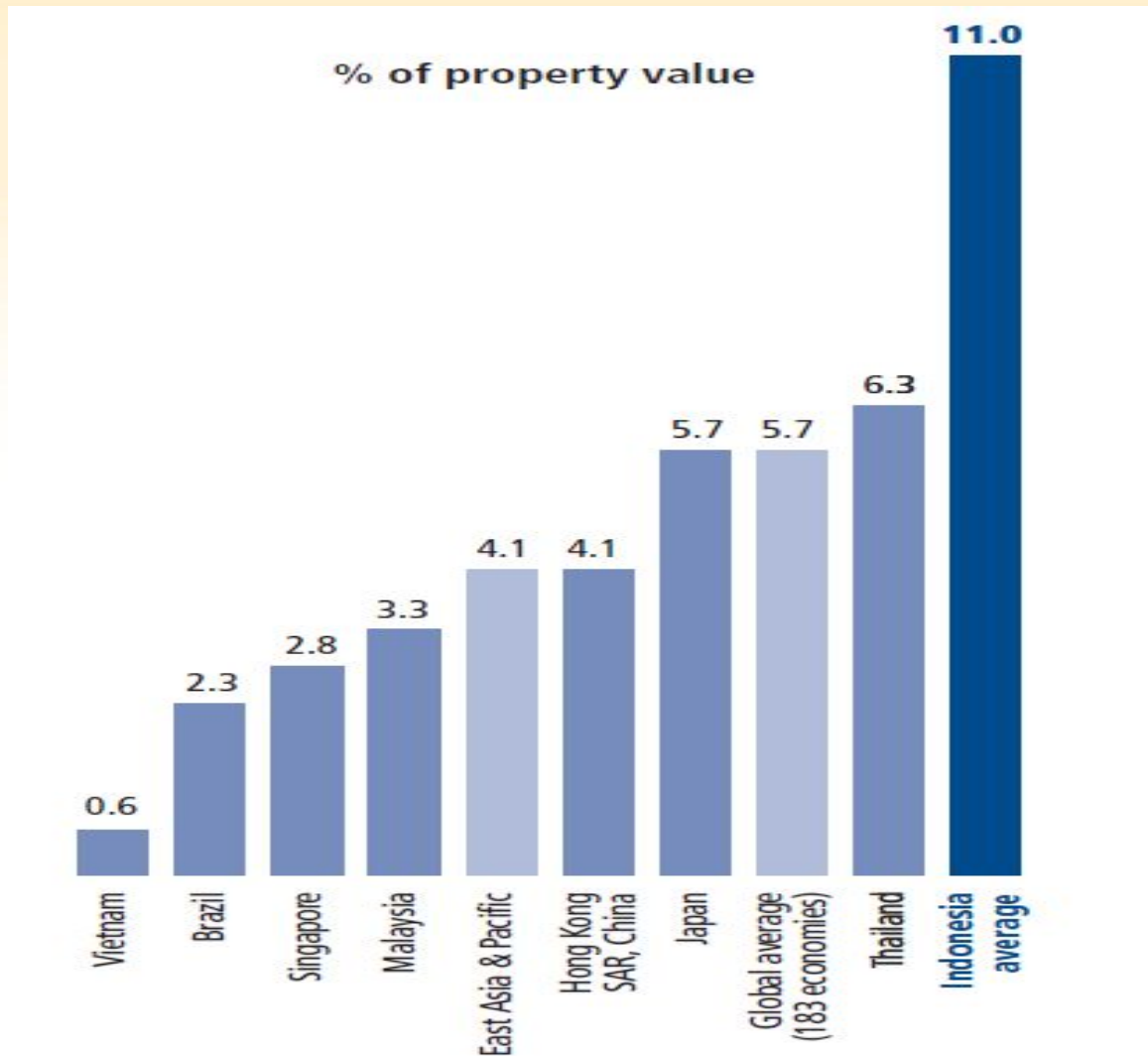
Dealing with construction permits was radically transformed in Banda Aceh



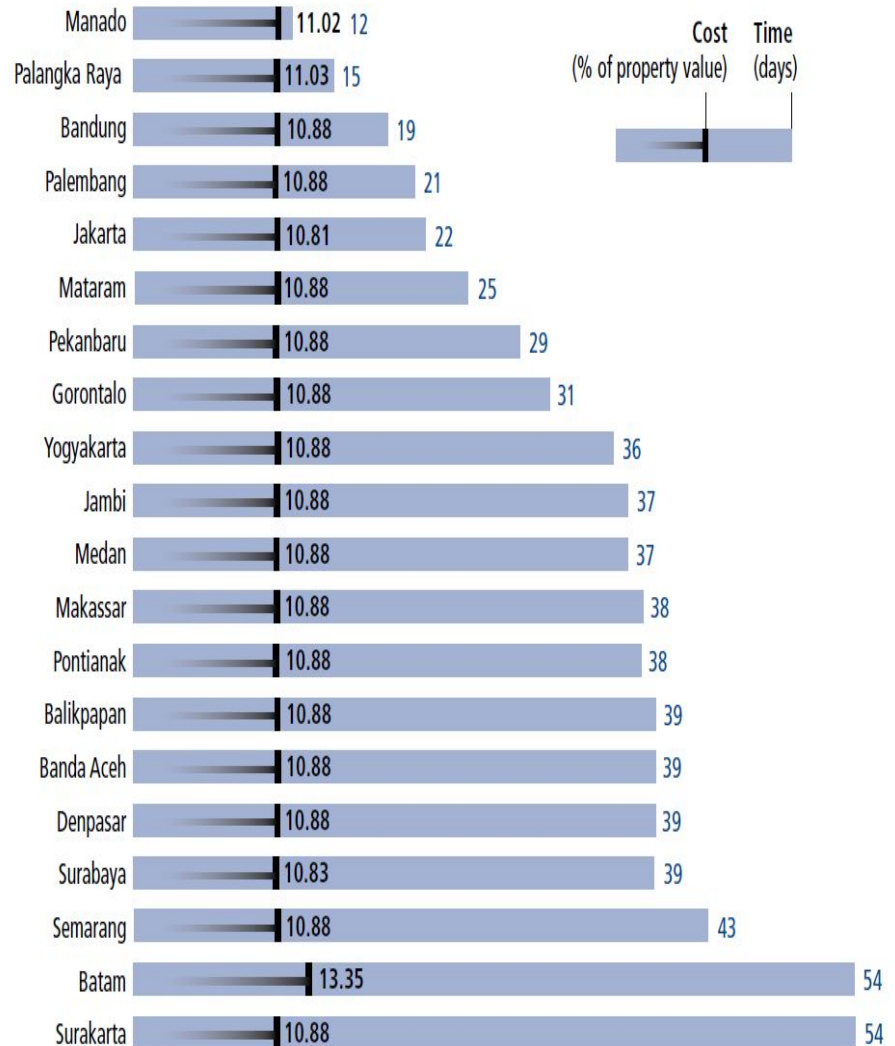
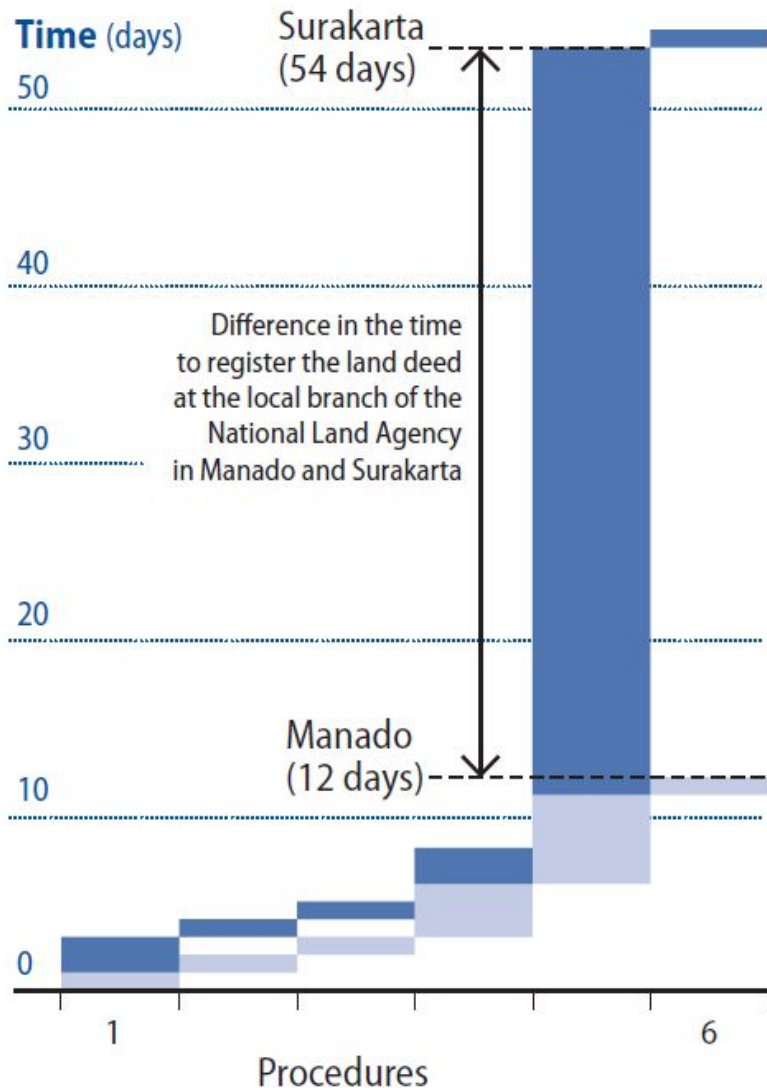
City level regulations drive the cost of building permits



Registering property is expensive



Despite a standardized process, property registration times vary across cities



Indonesian cities have good global practices

Indicator	Best performing city within Indonesia	Performance	Global rank (183 economies) How Indonesia would compare globally
Number of procedures to deal with construction permits	Medan, Yogyakarta	7 procedures	4
Days to deal with construction permits	Banda Aceh	42 days	5
Days to register property	Manado	12 days	27
Cost to deal with construction permits	Jambi	32% of income per capita	42
Number of procedures to register property	All cities except Batam, Semarang	6 procedures	83
Number of procedures to start a business	Balikpapan, Denpasar, Jakarta, Palangka Raya, Surakarta, Yogyakarta	8 procedures	109
Cost to start a business	Jakarta, Pontianak, Yogyakarta	18% of income per capita	111
Days to start a business	Gorontalo, Palangka Raya	27 days	117
Cost to register property	Jakarta	10.81% of property value	151

Why does it matter?

Easier business entry means more new firms: evidence from empirical research

Mexico

- Impact of the reduction of registration procedures through the introduction of One-Stop Shops and the elimination of federally required procedures
 - Increase in the number of new firms of about 5%
 - Increase in employment by 2.2%
 - Consumer Price Index decrease by 1% due to competitive pressures of new entrants

Colombia

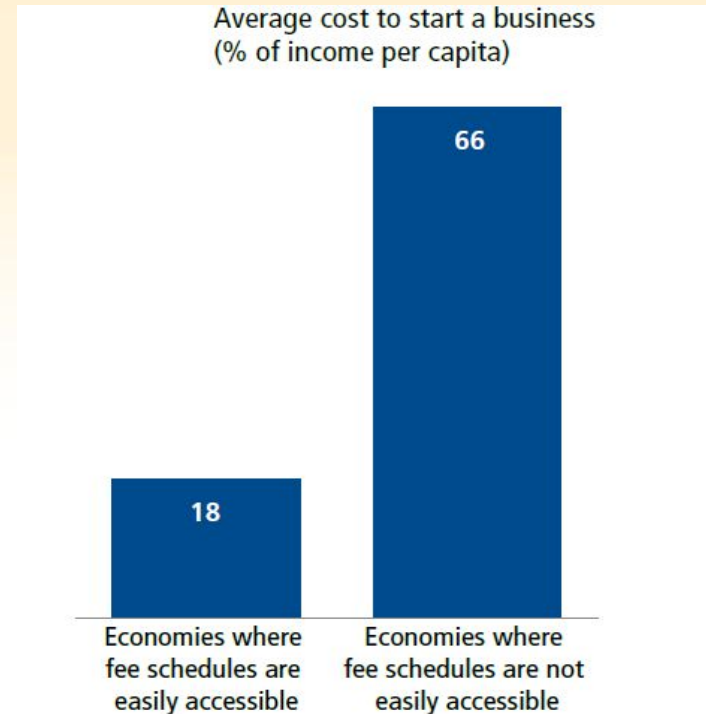
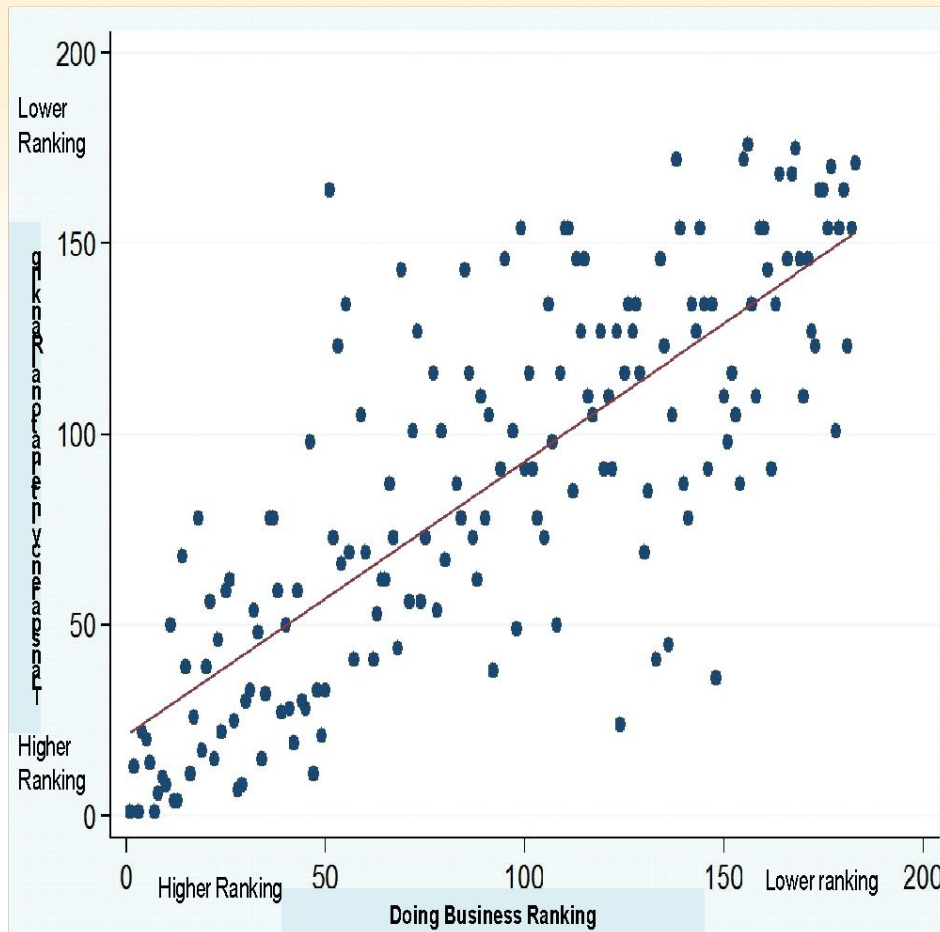
- Impact of the introduction of One-Stop Shops in 6 cities:
 - Increase of 5.2% in the number of new firms

India

- Impact of the elimination of License Raj in 16 states over 64 industries:
 - Increase in the number of new firms by 6%

Good business regulations and governance

In countries where business regulation is efficient and access to the relevant documents and fees to comply is easy, the perception of corruption is lower....



Note: Relationships are significant at the 5% level after controlling for income per capita. Fee schedules are considered easily accessible if they can be obtained through the website of a government agency or through public notices, without a need for an appointment with an official. The data sample includes 174 economies.

Source: Doing Business database.