INDONESIA MARITIME CONNECTIVITY, DEVELOPMENT EQUALITY AND ASEAN CONNECTIVITY

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INDONESIA MARITIME CONNECTIVITY, DEVELOPMENT EQUALITY AND ASEAN CONNECTIVITY

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Abstract

The awareness to develop Indonesia as maritim state has started since the goverment of President Joko Widodo in 2015. It was started by government vision "Road to Change for Sovereign, Independent Indonesia" which then converted into the Middle and Long Term National Development Planning 2015-2019. In his first term, Jokowi was abled to conduct "fundamental economic transformation", in which consumption-based political budget has been shifted into production-based, infrastructure development, and Indonesia-centric development perspective to push more equal development. One of its aspect is vision of sea as unity factor for Indonesia; Indonesia acting as maritime state where ocean, sea, strait and bay are the future of Indonesia. One of main argument in the development of Indonesia maritime connectivity is that the existence of connectity will overcome unequal development between Western Region and Eastern Region – something which is very important in the formation of strong maritime state. How far the vision of connectivity of Indonesia maritime is realized? What is the impact of physical connectivity especially maritime connectivity in the form of Sea Toll for the people's welfare in Eastern Region of Indonesia? This paper will analyze the small part of this 'big question' by reviewing the progress of Sea Tol development, constraints and challenges which are found as well as implication for the development of ASEAN Connectivity.

Key Words: Maritime State, Maritime Connectivity, Sea Toll, Unequal Development, ASEAN Connectivity

Introduction

Indonesia as a maritime country has been proclaimed explicitly since the government of President Joko Widodo in 2015 in the form of Global Maritime Fulcrum policy which has been written in two important documents about Indonesia Maritime Policy that are National Document on Indonesia Maritime Policy and Action plan of Indonesia Maritime Policy 2016-2019. Systematically the Development of Maritime Indonesia is divided into five clusters of priority programs, which are (i) Maritime Border of Sea Space, Maritime Diplomacy, (ii) Maritime Industry and Sea Connectivity, (iii) Natural Resources Industry and Maritime Service and management of Maritime Environment, (iv) Defence and Maritime Security and (v) Maritime Culture (Coordinating Ministry on Maritime, 2015).

As part of the second priority Maritime Industry and Sea Connectivity, Indonesia maritime connectivity become an urgent priority as prerequisite for economic growth and balancing economic gap between Eastern and Western part of Indonesia. Maritime connectivity is realized through Sea Toll program, a new diction which need a new understanding method so that the short, medium and long term goals of Sea Toll program can be achieved. So far the development of Toll Road shows progress but obstacles and challenges are still great considering the broad area of Indonesia's sea and ASEAN connectivity masterplan which continue to be developed. The continuity of Indonesia maritime development will impact not only to the sub-region economy of Indonesia but in the future it will contribute to the regional level of ASEAN connectivity.

Research Method

The study is conducted by using qualitative method where the research subject is the government of Republic of Indonesia together with related agent and ministry like Ministry of Transportation, Ministry of Public Works and Housing, Ministry of Industry, Meteorological, Climatological and Geophysical Agency, National Border Management Agency, Coordinating Ministry for Economic Affairs and various State Owned Enterprises. While research object is policy and strategy of maritime connectivity development including its challenges. The research is analytic since analysing causal relation between connectivity problem faced by Indonesia and its policy and strategy of implementation. Descriptive analysis is used to describe maritime connectivity in the Indonesia shipping routes.

Data collection is conducted through various methods of literature study and interview. Literature data was used in the form of documents of constitution, regulation, policy, report, news, articles and research report. Interview has been conducted by doing discussion with resource person from Ministry of Transportation and state owned shipping enterprise and researchers. To clarify the phenomenon, researcher was also using concepts of other disciplines like Planology, Transportation, Economy, Law and Geopolitics where the whole understanding

of connectivity phenomenon of Indonesia maritime was enriched with critical interpretation on qualitative and quantitative data and become synthesis based on the researcher's perspective.

Concept of Connectivity

The idea of connectivity has emerged and has risen since the development of modern economy. Connectivity becomes the important part of every plan of infrastructure development with more increasing trend. It was proved by the high demand of investment in linking community, economic resources even among countries. Asian Development Bank study has estimated that Asia Pacific region will need investment up to $26 trillion by 2030 to fulfil its need of networks of transportation, energy and telecommunication as basic infrastructure for interaction of economy, politic and social (GICA 2018, 3).

Different agencies employ varying definitions of connectivity. Connectivity is characterized as networks and as a set of interconnected nodes, which can be a person, firm, city, countries or other spatial entity (GICA 2018, 3). Connectivity sometimes is meant as multilayer concept consists of various networks in different scale from the local, regional and global. Connectivity is an attribute of a network and is a measure how well connected any one node to all other nodes in the network. The value of connectivity is in the role expected in the node, the cost to access the node and reliability to connect to the node. Connectivity has three important attributes: a physical domain, information and financial flows (GICA 2018, 4). The large resources aimed at lowering costs, often with an emphasis on physical connectivity. Therefore in its maritime development connectivity, Indonesia firstly is thinking how one place (node, port) can be connected to other place (node, port) and through that node connectivity of hinterland can be developed. The main goal is to distribute the daily need of goods from the main node and flowing to the destination node and vice versa. Thus it can be achieved in increasing interaction, productivity, competition and market opportunity among ports in Western part and Eastern part of Indonesia.

Development Strategy of Indonesia Maritime Connectivity

The development of maritime connectivity become main agenda of Indonesia by proclaiming Global Maritime Fulcrum where Indonesia is seen as sovereign, progress, independent and strong maritime state which able to provide positive contribution to the secure and peaceful region and world based on its national interest (Attachment I Regulation of President of Republic Indonesia No 16 Year 2017 about the Indonesia Sea Policy) and become part of great scheme of Indonesia maritime development (picture 1). The document stated that the development of Global Maritime Fulcrum basically consists of (1) Developing Indonesia maritime culture; (2) Guarding sea and its resources by focusing on developing sea food sovereignty through fishing industry by placing fishermen as the main pillar; (3) Giving priority to the infrastructure development and maritime connectivity, by building sea toll, deep seaport, logistics and shipping industry and maritime tourism; (4) Strengthening maritime diplomacy, cooperation in the maritime field, eliminating conflict sources in the sea like illegal fishing, sovereign violation, regional conflict, piracy and sea pollution; and (5) Building maritime defence power to maintain sovereignty and maritime resources and as a form of responsibility in keeping shipping safety and maritime security (Coordinating Ministry for Maritime Affairs 2015, 1).

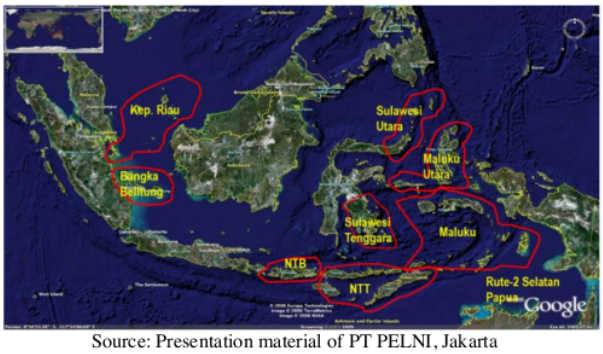
Picture 1. Schematic Program of Maritime Development and 5 Clusters of Priority Program

Source: Attachment I President of Republic of Indonesia Regulation Number 16 Year 2017 on Indonesia Sea Policy

The reason behind the program is clear that although the capital owned by Indonesia is big in form of sovereign area and sovereign rights as the largest archipelagic state in the world which its implication that international community has to sail through this sovereign area for variety of reasons – like navigation, communication, optic cable installation, gas pipe and goods and services trade; its strategic geographic aspect – its intersecting position between continent and sea; having position between middle and global powers; beside

aspect of natural resources and sea resources; but without connectivity all potencies will not create welfare for the whole nation.

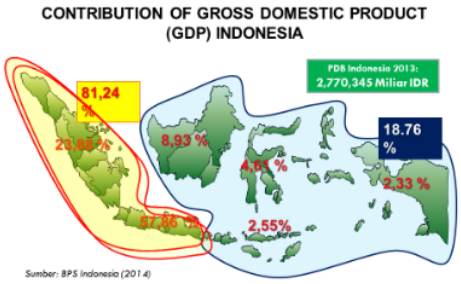
Map 1. Indonesia as the biggest Archipelagic State and its Archipelagic Provinces



Source: Presentation material of PT PELNI, Jakarta

Specifically, the progress of maritime connectivity always related to expectation to lowering the gap between Western and Eastern part of Indonesia. The inequality of GDP contribution shows the difference of economic prosperity of both areas. The map below shows that contribution of GDP of Sumatera is 23.8%, Java is 58.0% (Western Part), Bali-Nusa Tenggara is 2.5%, Kalimantan is 8.7%, Sulawesi is 4.8% and Papua is 2.2% (Eastern part) (Bappenas, 2015).

Map 2. Contribution of GDP (Gross Domestic Product) among Western and Eastern Region of Indonesia



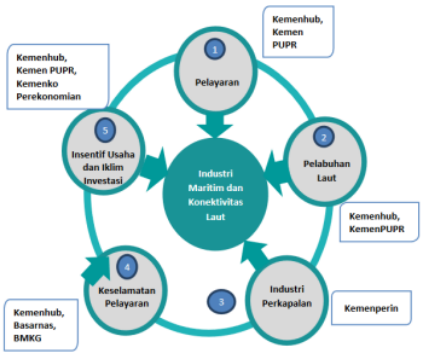
The left behind area in Indonesia is shown by red and yellow colour in the map below. Red colour shows regions which economically is still minus.

Picture 3. Map of location of the Left behind Region in Indonesia

Source: https://www.google.com/search?q=peta+lokasi+daerah+tertinggal&safe=strict&client=

According to priority of B program of Maritime Industry and Sea Connectivity, therefore the government of Indonesia determined five main activities of (i) shipping, (ii) Sea Port, (iii) Shipping Industry, (iv) Shipping Safety and (v) Business Incentive and Investment Climate including ministries and authority which responsible to develop including Ministry of Transportation, Ministry of Public Works and Housing, Ministry of Industry, Search and Rescue National Agency, Meteorological, Climatological and Geophysical Agency, Coordinating Ministry for Economic Affairs. Schematically. Those five priority activities can be describe as below:

Picture 2. Schematic Program of Maritime Industry and Sea Connectivity



Source: Attachment I President of Republic of Indonesia Regulation Number 16 Year 2017 on Indonesia Sea Policy

It has been realized that reliable sea connectivity (Sea Toll) is a need of Indonesia as vast archipelagic state so that sea connectivity must able to connect the important points from Sabang until Merauke. The expectation to Sea Toll mainly is to reduce regional disparity among Western and Eastern region of Indonesia, solution for smooth commodity exchange, increasing people mobility and economic development equality. The implementation of Sea Toll also to increase sea toll performance through improvement of domestic and international shipping and increasing the role Indonesia's sea transportation (Coordinating Ministry of Maritime Affairs of Republic of Indonesia 2017). In the short term Sea Toll aims to connect isolated region to be more open, able to distribute basic need of the people regularly which is the main task of government. With the availability of regular transportation the impact is more on the availability of goods, stability and lowering the price of basic goods like rice, sugar, oil, egg of people in the remote and isolated areas. And the most important thing is to develop the potency of local people. Nationally, sea toll will lowering national logistic cost, increasing competitiveness of national product, balancing amount of transportation/cargo among regions and encourage new central economy (indonesiabaik.id/public/uploads/post/3638/Booklet-Kemaritiman-Indonesia-Maju-dan-Berdaya-Saing-jpg.pdf).

The Progress of Sea Toll Program

The initial ide of Sea Toll was conveyed by Joko Widodo together with Jusuf Kalla during the presidential election campaign on 2014 and starting with basic idea how to find solution toward the low supply of basic goods that implicate in emerging of price disparity in the remote and isolated and border areas. Sea Toll is defined as direct, regular and scheduled sailing either having or not having container to be transported. Sea Toll will sail based on schedule determined by government. Sea Toll will start from producer region to the consumer in the remote and neglected and border areas. The remote and left behind area is prioritized because of its limited condition which is difficult to be connect, having limited road infrastructure and small population. These conditions are creating assumption that those areas are not potential and not interest to be developed. From the commercial aspect, the sailing to remote areas is not profitable so that government's role is needed.

Base on Presidential Decree Number 106 Year 2015 about Public Service for Goods Shipping the assignment for operating Sea Toll was given to PT PELNI and two years later also distribute to PT ASDP Indonesia Ferry and other company which join under the Indonesian National Shipowners Association (INSA). Two new routes were decided that were T3 Tanjung Perak-Larantuka-Lewoleba-Rote-Sabu-Waingapu (2076 miles), T4 Tanjung Priok- Manokwari – Wasior – Biak (4644 miles) in 2015, and in 2016 there were 6 routes and in 2017 become 13 routes and finally in 2018 totally there were 15 routes.

The existing Sea Toll routes is as followed based on The Decision of Directorate General of Sea Transportation Number AL. 108/5/17/DJPL-17 dated December 20 2017 about Routes Networks of Goods Transportation in the Sea:

1) Route T1: Teluk Bayur – Pulau Nias (Gunung Sitoli) – Mentawai – Pulau Enggano – Bengkulu (Main Ship)
2) Route T2: Tanjung Priok – Tanjung Batu – Blinyu – Tarempa – Natuna (Selat Lampa) – Midai – Serasan – Tanjung Priok (Main Ship)
3) Route T3: Tanjung Priok – Belang-Belang – Sangatta – Nunukan – Pulau Sebatik (Pulau Nyamuk) – Tanjung Perak (Main Ship)
4) Route T4: Tanjung Perak – Makassar – Tahuna – Tanjung Perak (Kapal Utama) Tahuna – Kahakitang – Buhias – Tagulandang – Biaro – Lirung – Melangoane – Kakorotan – Miangas – Marore – Tahuna (Feeder)
5) Route T5: Tanjung Perak – Makassar – Tobelo – Tanjung Perak (Kapal Utama) Tobelo – Maba – Pulau Gebe – Obi – Sanana – Tobelo (Feeder)
6) Route T6: Tanjung Perak – Tidore – Morotai – Tanjung Perak (Main Ship)
7) Route T7: Tanjung Perak – Wanci – Namlea – Tanjung Perak (Main Ship)
8) Route T8: Tanjung Perak – Biak – Tannjung Perak (Kapal Utama) Biak – Oransbari – Waren – Teba – Sarmi – Biak (Feeder)
9) Route T9: Tanjung Perak – Nabire – Serui – Wasior – Tanjung Perak (Main Ship)
10) Route T10: Tanjung Perak – Fak-fak – Kaimana – Tanjung Perak (Main Ship)
11) Route T 11: Tanjung Perak – Timika – Agats – Merauke – Tanjung Perak (Main Ship Crossing)
12) Route T 12: Tanjung Perak – Saumlaki – Dobo – Tanjung Perak (Main Ship)
13) Route T13: Tanjung Perak – Kalabahi – Moa – Rote (Ba'a) – Sabu (Biu) – Tanjung Perak (Main Ship)
14) Route T14: Tanjung Perak – Larantuka – Adonara (Terong) – Lewoleba – Tanjung Perak (Main Ship)
15) Route T15: Tanjung Perak – Kisar (Wonreli) – Namrole – Tanjung Perak (Main Ship). (Public Relations Directorate General of Sea Transportation).

The map of operation route of goods transportation in the sea is as follow:

Map 4. Operation Route of Goods Transportation in the Sea

Source: Ministry of Transportation

The new routes are expected able to change the economic map of Indonesia in the future, especially to push the local economy activity facilitate transportation and marketing to the western part of Indonesia. Besides opening various new routes, the government also planning to procure shipping fleet with high safety standard of pioneer ships, livestock ships, container ships to distribute goods to various remote islands. The new ship is using domestic dockyard in Palembang, Batam and Madura and it is ensure that in 2018 it has already available 100 ships of toll road all over Indonesia where all of it are pioneer ship. Sea toll scheme will also be implemented through various alternative cooperation with private company. Ministry of Transportation through Directorate General of Sea Transportation and dockyard of PT Adiluhung SI and PT Bahtera Bahari Shipyard also making 5 unit of livestock ships during budget year 2015-2017 to support distribution of cow/buffalo to achieve self-supporting meat all at once implementing principle of animal welfare (Sujadi 2019, 25).

Another aspect related to sea toll program is the availability of port infrastructure. Connectivity will be built if port as a place for ship to dock and load of goods and people fulfil the international standard and requirement. Therefore infrastructure of port as part of new route also be developed, among other (i) Wanci Port, Wakatobi Southeast Sulawesi, (ii) Namlea Port Buru, Maluku, (iii) Saumlaki Port, Southeast Maluku (iv) Calabai Port, Dompu, NTB, (v) Larantuka Port, Flores NTT, (vi) Lewoleba Port, Lembata, NTT, (vii) Baa Port, Rote Nado, NTT, (viii) Tahuna Port, Sangihe Island, North Sulawesi, (ix) Daruba Port, Morotai, North Maluku, (x) Selat Lampa Port, Natuna, Kepulauan Riau, (xi) Malakoni Port, Enggano, Bengkulu, (xii) Sikakap Port, Mentawai, West Sumatera, (xiii) Belang-Belang Port, Mamuju, West Sulawesi, (xiv) Sangatta Port, East Kutai, East Kalimantan, (xv) Sungai Nyamuk Port, Nunukan, North Kalimantan, (xvi) Namrole Port, South Buru,

Maluku, (xvii) Soasio Port, Tidore Islands, North Maluku, (xviii) Tobelo Port, North Halmahera, North Maluku (xix) Manitingting Port, East Halmahera, North Maluku, (xx) Dobo Port, Aru Islands, Maluku, (xxi) Wasior Port, Teluk Wondama, West Papua, (xxii) Nabire Port, Papua, (xxiii) Serui Port, Yapen Islands, Papua, (xxiv) Kaimana Port, Papua, (xxv) Pomako Port, Mimika West Papua (Sujadi 2019, 37-53).

Sea Toll program cannot be implemented without cooperation of various parties. The coordination of Sea Toll is under Coordinating Ministry of Maritime Affairs. Technically it will be conducted by Ministry of Transportation, Ministry of Trade and some State Owned Enterprise. PT PELNI is acting as fleet liner operator or as operator of goods transportation by scheduled ship. Those operation is in accordance with the role of PELNI as one of government instrument with mission of people welfare especially pioneering and other intervention in the field of sailing. So far Indonesia still has many remote and isolated islands which has no service from shipping company therefore equal prosperity has not achieved yet. Government responds by providing pioneer shipping as the main instrument. The specific task of PT PELNI is as operator with main responsibility of shipping from container yard (CY) to CY of departing port to destination port; issue formal letter for load as operator and provide transportation for left behind and isolated islands according to ship availability and sail worthiness that operated based on assigned route and conducting sailing as scheduled. While the task of Ministry of Transportation whose giving task according to Presidential Regulation 106/2015 through regulation of Ministry of Transportation PM 4 Year 2016 and PM 161 Year 2016; provide facility and loading tools and determine routes of goods shipping. Ministry of Trade will focus on implementation of marketing of goods and provide goods which is supported by Local Government and PT PELNI; control good price in the destination together with local government and receiving recommendation from local government about good which is needed and business actors in each destination route.

Route availability, transportation facility (ship fleet) and port infrastructure in implementing connectivity is not enough yet. To activate local economy it has to be supported by having supply and buying of local production. Ministry of Transportation and Ministry of State Owned Enterprise therefore synergise several enterprises like PT PELNI, PT Semen Indonesia (Persero) Tbk, PT Perusahaan Perdagangan Indonesia, PT Perinus, PR RNI dan Perum BULOG to form center of logistics for good distribution called as "Rumah Kita", based on Letter of Ministry of Transportation Number. AL, 005/4/17 Phb-2017 to support sea toll as consolidation media to prepare distribution flow from mainstream to downstream (Sujadi 2019, 147-148). "Rumah Kita" therefore is established in several regions like Manokwari-Papua, Serui-Papua, Timika- West Papua, Morotai-North Maluku, Tarempa–Riau Islands, Merauke-Papua, Tidore- North Maluku and Samlaki-Southeast Maluku (https://www.infokbn.com/pemerintah-siapkan-13-titik-gudang-logistik-rumah-kita). The purpose of "Rumah Kita" are (i) lowering logistic cost of distribution flow, (ii) reduce disparity of main goods price, (iii) stable price since inflation is monitored, (iv) develop new economic centre, (v) increase connectivity of commodity among islands and (vi) as storehouse for reserve of main goods (http://indonesiabaik.id/infografis/rumah-kita-tol-laut-1).

Benefits of Sea Toll for People of Eastern Part Indonesia

Theoretically three main attribute of Sea Toll program of physical domain, communication and finance flow can be described as concrete benefit for Indonesia. Sea Toll clearly connect islands previously isolated. Sea toll also creates new networks and connect nodes previously not formed yet and not connected yet. The opening of new routes, preparedness of new pioneer ships fleet, development of new port and opening of connectivity among islands through centre of logistics from outside and inside islands in the form of "Rumah Kita" program are part of physical connectivity of Sea Toll. While information and finance flow become part of aspects that will follow physical aspect which has been realized.

One of the main focus of Sea Toll is whether there is lowering of sea transportation cost of goods, whether there is increasing of load factor and whether sea toll able to lowering basic needs of good price for people in Eastern part of Indonesia? Actually it been reported that transportation cost by using commercial ship and sea toll ship is decreasing into 50% (https://www.jawapos.com/ekonomi/08/12/2018/berjalan-3-tahun-ini-hasil-program-tol-laut-bagi-pengusaha-logistik/). If before route of Surabaya-Merak costs Rp 10-11 million (private ship) by using sea toll the price is only Rp 6 million. Similar to route of Surabaya-Fakfak by using private ship costs Rp 10-11 million, but it only Rp 4.9 million by using sea toll ship.

Occupancy rate of PELNI ship is reported increase average become 80%, with details as follow:

Table 1. Performance of Goods Transportation Implementation 2017

Code of Route Operation	Ship Name	Load Capacity (Full) Teus	Load Capacity (Full) Ton	Average of Load Realization (Tonnes)	Load Factor (%)	Length of Sailing (hari/voy)	Voyage Done (call)	Cat: Vol determined

T-13	KM Freedom	192	3840	98	85%	26	3	115
T-11	KM Mentari Perdana	199	3980	120	104%	27	2	115
T-3	KM Caraka Jaya Niaga III-22	115	2300	86,5	75%	25	2	115
T-12	KM Meratus Ultima	247	4940	63	55%	27	3	115
T-5	KM Caraka Jaya Niaga III-32	115	2300	64	56%	25	3	115
Total/Average		868	17360	432	75%			575
T-6	KM Caraka Jaya Niaga III-4	-	2400	300	13%	9	6	-

Source: Sujadi 2019, 63

Sea toll impact toward lowering of goods price can be found on route Tanjung Perak-Biak (Bappenas 2017) where the price of flour before Rp 10.000.kg become Rp 7.600/kg (minus 32%). Rojo Lele rice per zak from Rp 269.000 become Rp 238.000 (minus 13%), oil from Rp 15.000 become Rp 13.000 per liter (minus 15%). On route operation of Makassar-Manokwari the decrease of small chili is 75% from Rp 75.000 to Rp 40.000, egg is 20% from Rp 60.000 become Rp 50.000.

The challenge of sea toll is still great, considering that geographical range of Indonesia is very fast. The need of ship for logistics and people transportation for various activity among islands certainly will increase and to fulfil ship fleet in various size will need large amount of fund.

Intraregional connectivity in Indonesia is expected to be grow continuously starting by initiative and commitment of government Indonesia and only by developing connectivity consistently, Indonesia can contribute to the development of ASEAN connectivity.

Conclusion and Recommendation

It is the responsibility of government of Indonesia to open connectivity among Western and Eastern part of Indonesia so that development gap in terms of social and economic development can be resolved. The government has implemented Sea Toll program as media to open greater connectivity by providing subsidy, pioneer ship for goods, ship for livestock, developing additional port including specific facilities like crane, rifer container for fresh meat, providing central logistic, urging synergy with private sector and continue evaluate and monitor price of basic needs. Government recognises that the program far from ideal but with the starting of program the weaknesses can be found and resolved. Some challenge has to be met among other things are the need of ship from the hub to the destination port that has to be followed by development networks of mode of transportation to the hinterland either by river, land or air transportation; developing synergy with various stakeholders mainly private and local government to distribute more massive goods and development of local products to fill return route; providing suitable facility of loading and unloading to develop hinterland around destination port and reduce and monitoring price disparity.

At the end initiative of sea toll program as part of greater maritime policy development will be part of Indonesian contribution in the ASEAN connectivity program since without connectivity in the local level/national there will not connectivity in the regional level which is bring benefit to the people of Indonesia.

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