



ASEAN ECONOMIC COMMUNITY 2015: Opportunities & Challenges

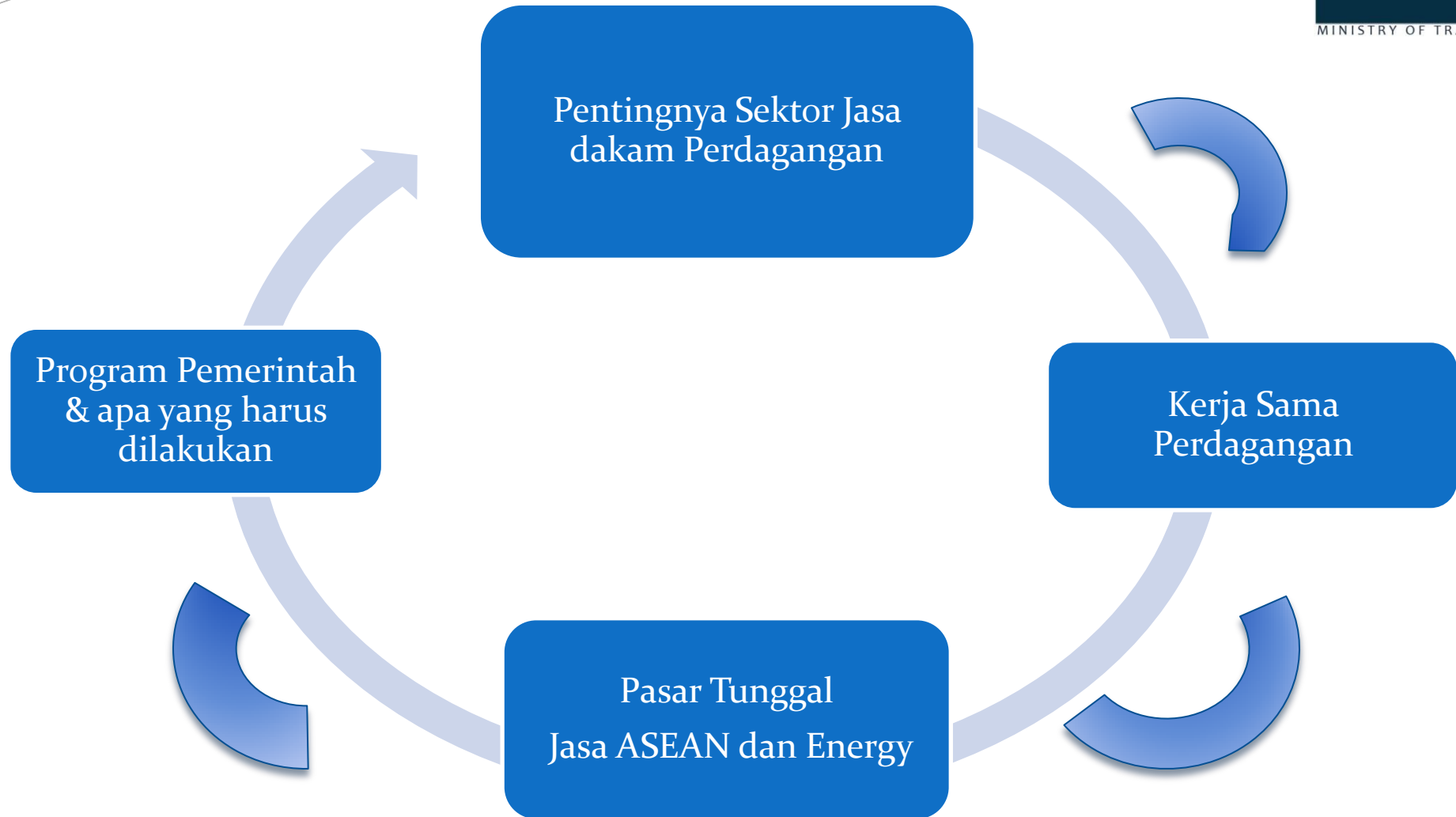
**Direktorat Jenderal Kerja Sama Perdagangan Internasional
Kementerian Perdagangan**

Perdagangan Sebagai Sektor
Penggerak Pertumbuhan dan
Daya Saing Ekonomi, serta
Penciptaan
Kemakmuran
Rakyat

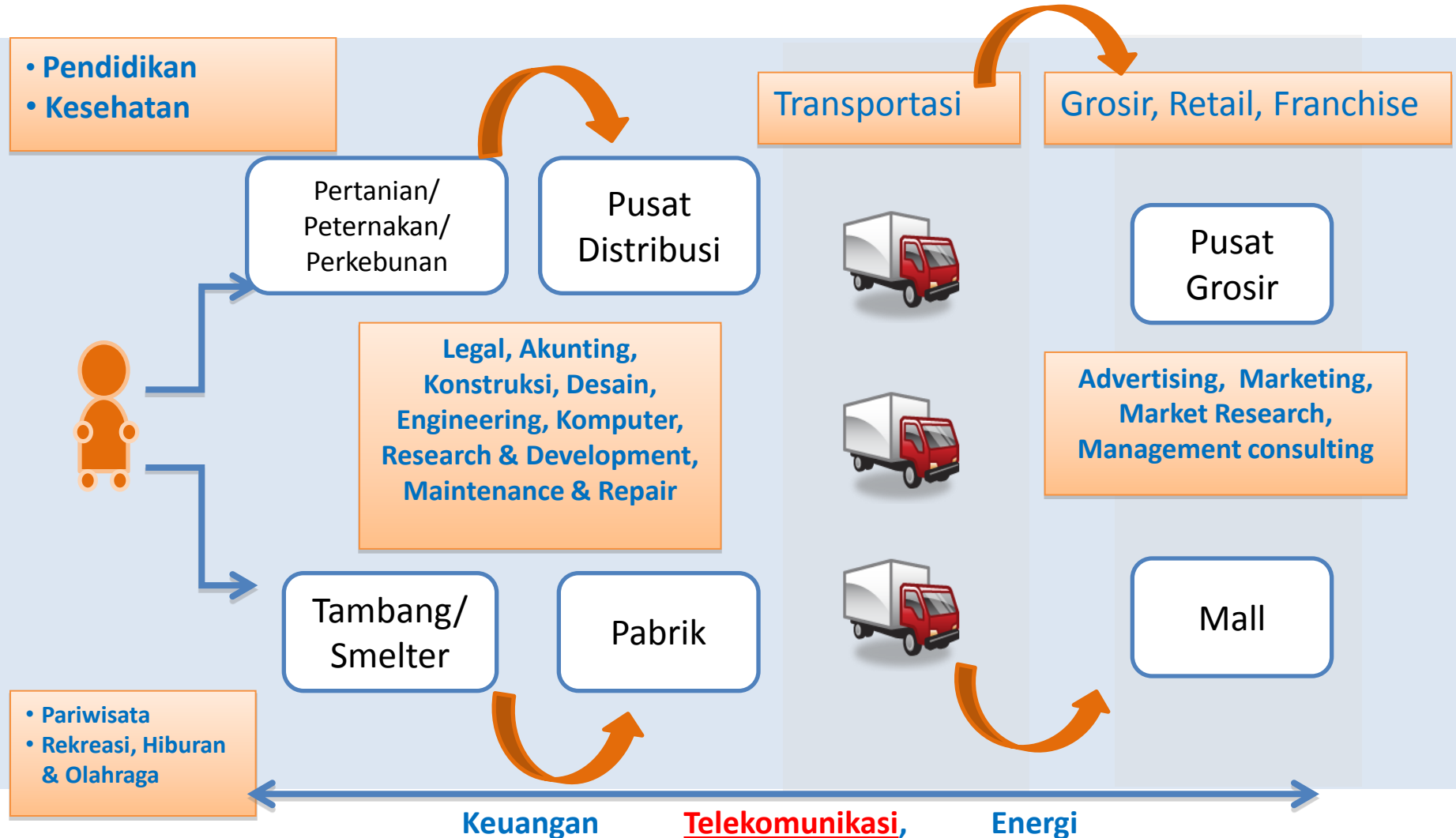
**remarkable
indonesia**

**Disampaikan pada acara Coffee Morning
Jakarta, 13 Nopember 2014**

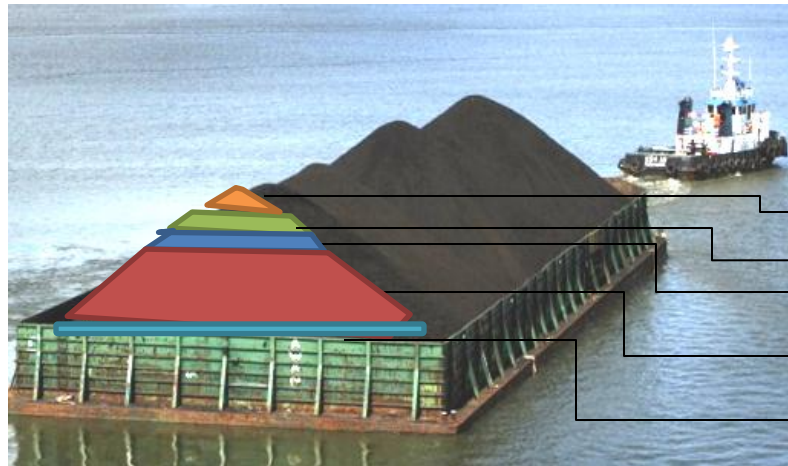
Outline



JASA SEBAGAI INPUT JASA DAN RANTAI PRODUKSI

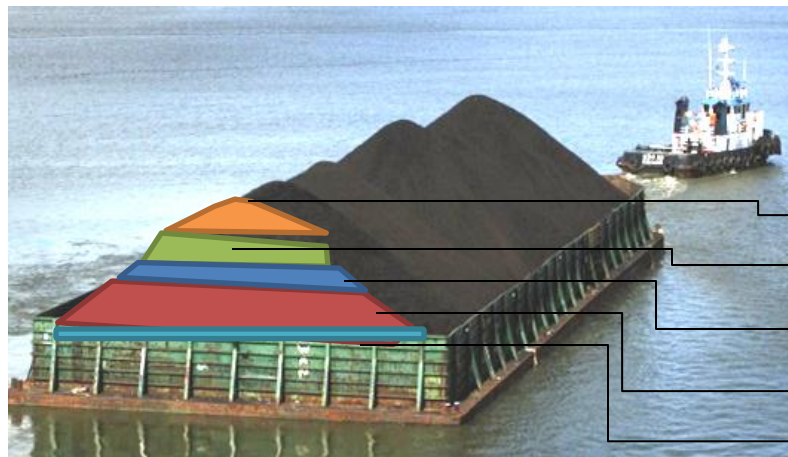


Komposisi Jasa di Sektor Pertambangan



Indonesia

- 3.88 % Jasa
- 14.19 % Lainnya
- 9.62 % Kompensasi pegawai
- 69.49 % Surplus bruto operasional
- 2.82% Pajak lainnya

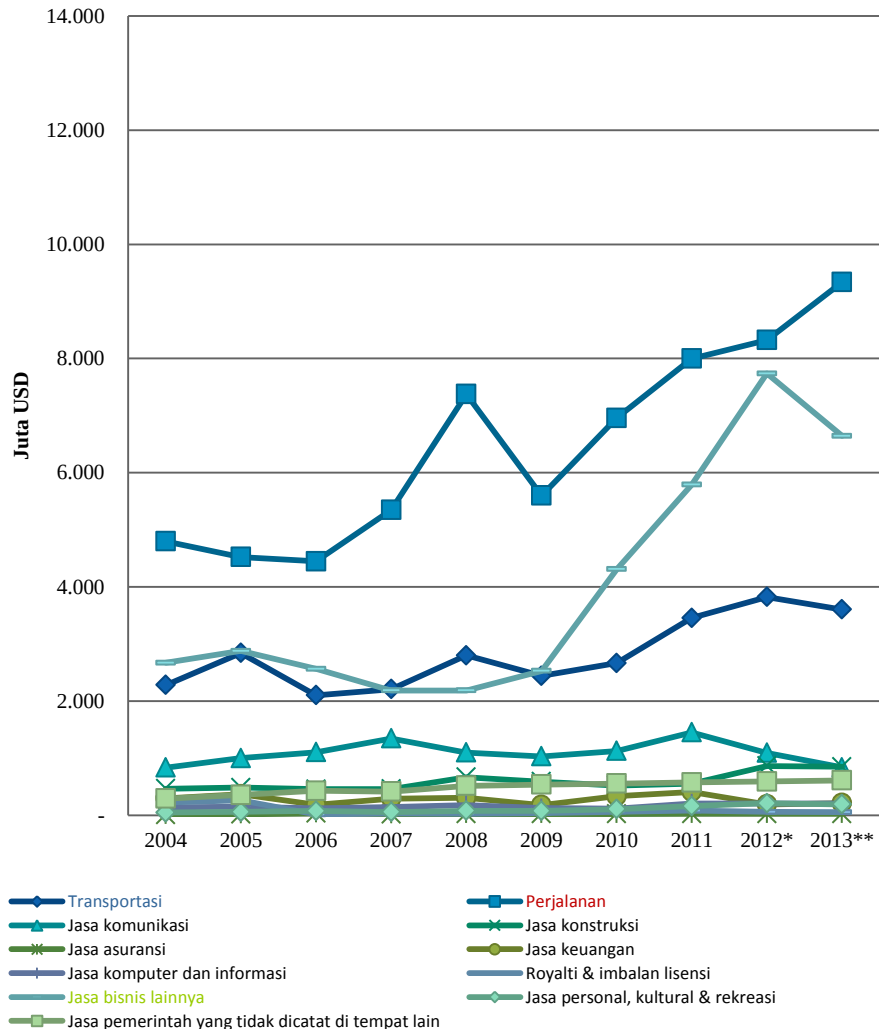


Australia

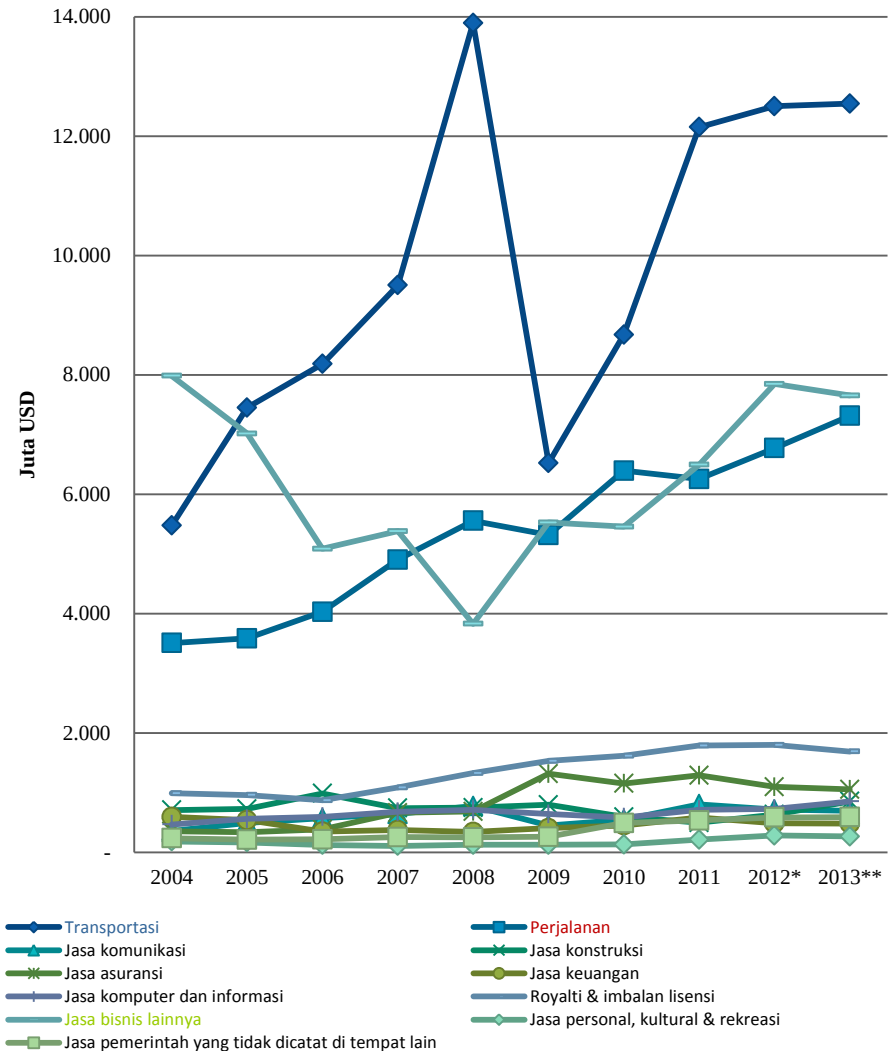
- 16.6 % Jasa
- 23.5 % Lainnya
- 11.6 % Kompensasi pegawai
- 47.7 % Surplus bruto operasional
- 0.7% Pajak lainnya

Perdagangan Jasa Indonesia

Perkembangan Ekspor



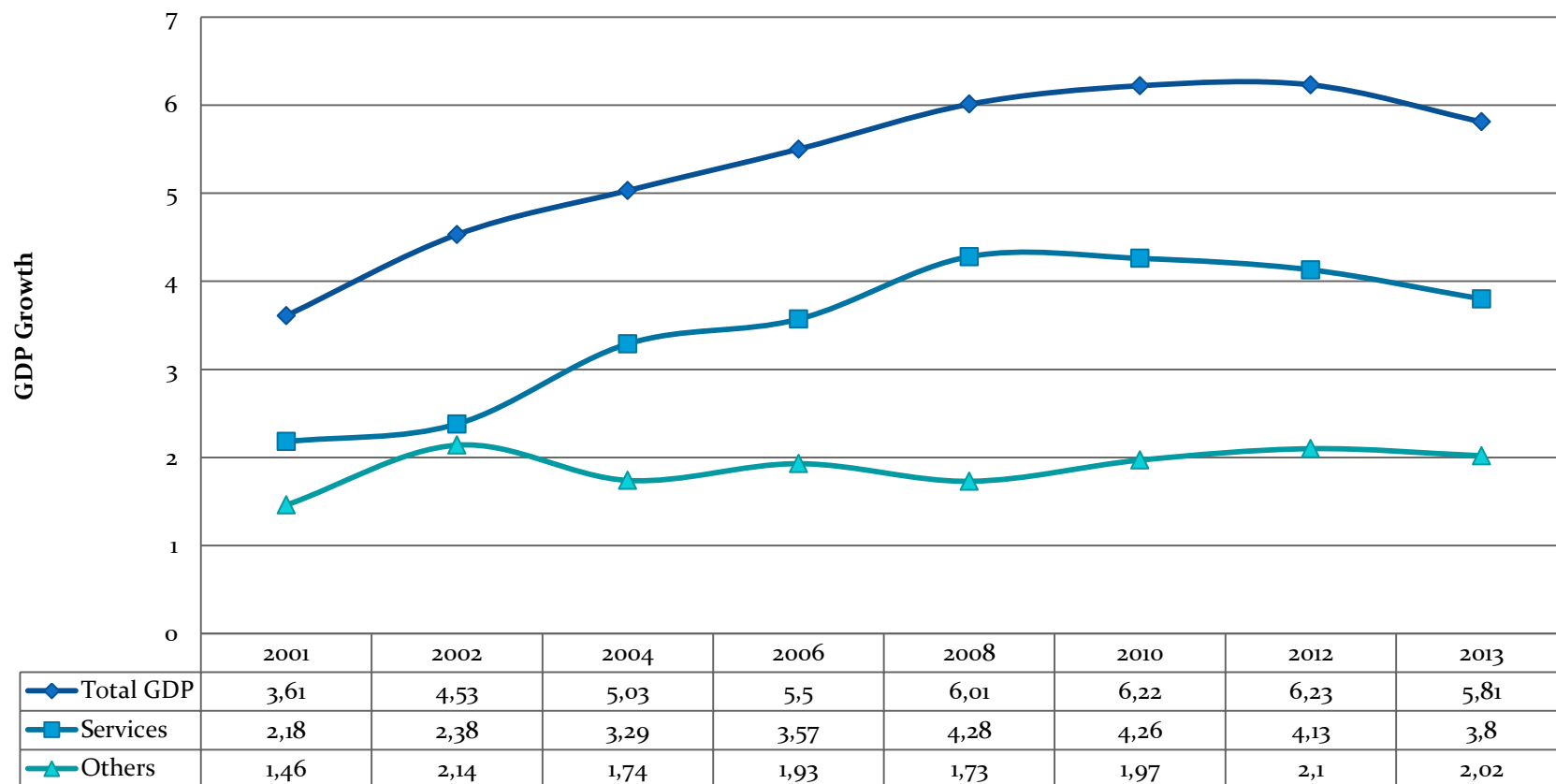
Perkembangan Impor



Sumber: Bank Indonesia (di olah)

Contribution of Services Sector to GDP Growth

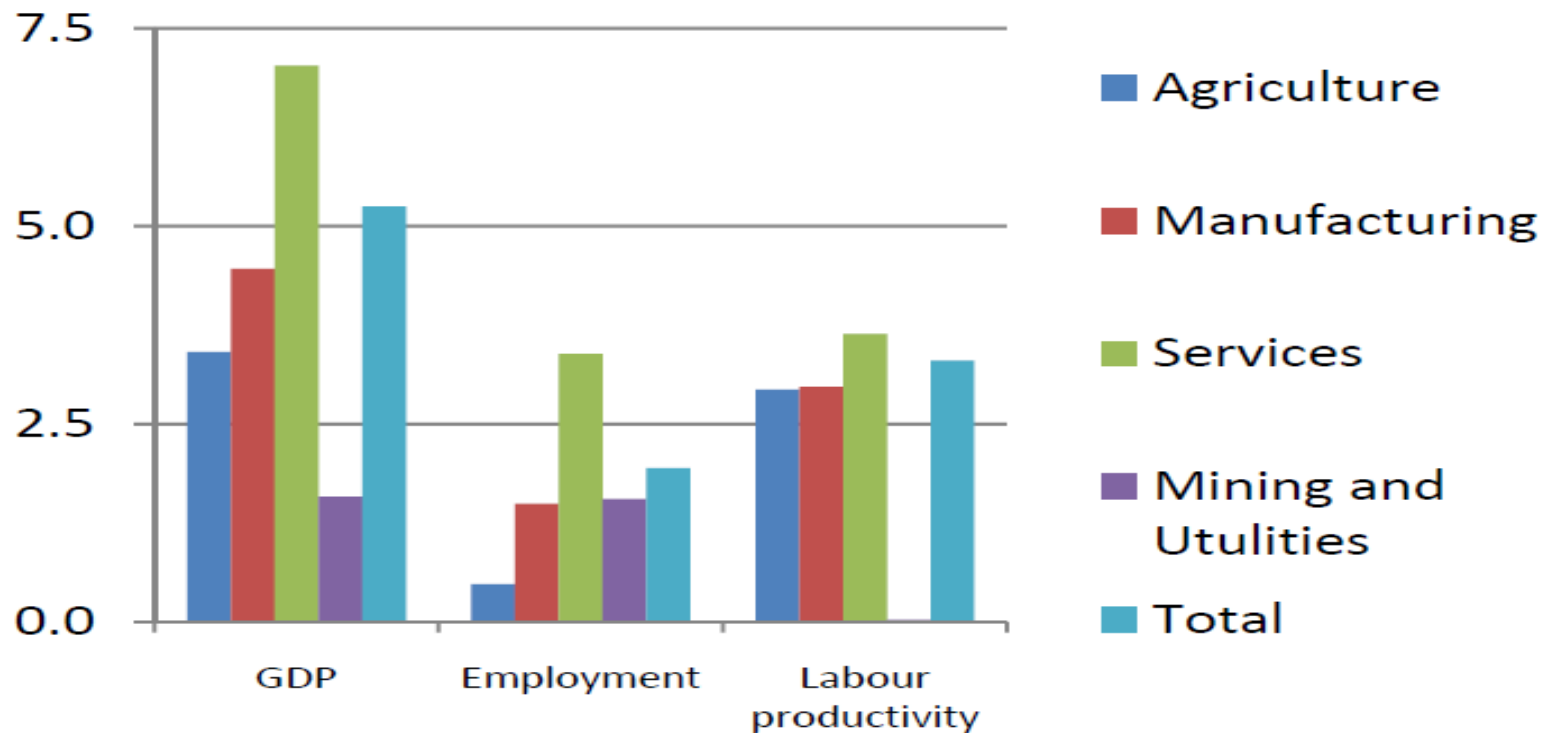
Contribution to GDP growth in percentage point



Source: BPS

Sektor Jasa memiliki potensi yang tinggi di Indonesia

Jasa memberikan kontribusi yang besar bagi tingkat pertumbuhan PDB, penyerapan tenaga kerja dan produktivitas TK di Indonesia.



Source: International Labor Organization and the European Commission. By Chris Manning and Haryo Aswicahyono. "Trade and Employment in Services in Indonesia". (2011).

Services is the engine of job creation in Indonesia

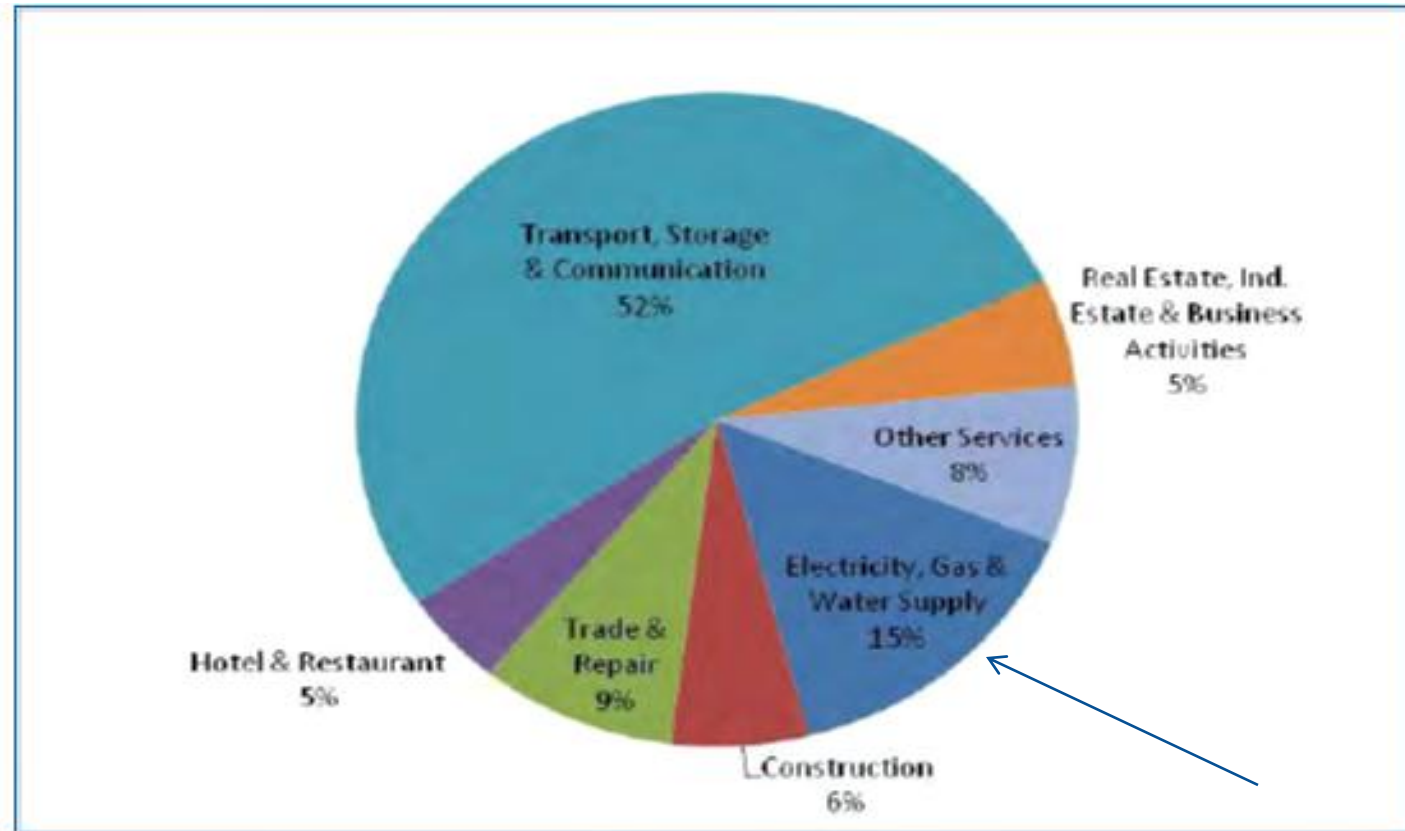
- ▶ According to Sakernas data, between 2000 and 2010, services created far more jobs than other sectors:
 - ❖ Services: 21.7 million jobs
 - ❖ Manufacturing: 2.2 million jobs
 - ❖ Mining: 750,000 jobs
 - ❖ Agriculture, Hunting & Forestry: 650,000 jobs
 - ❖ Public Administration: 600,000 jobs
 - ❖ Others: 400,000 jobs
 - ❖ Fishing: 300,000 jobs

- ▶ Since the start of the 21st century, **3 out of every 4** new jobs that were created In Indonesia were in services and service related sectors

Services have lifted more people out of Poverty than any other sector

- ▶ Recent work by SMERU has shown that between 1984 and 2008, 80% of poverty reduction in rural areas and 86% of poverty reduction in cities can be directly attributed to growth in the services sector.
- ▶ In other words, over the past 3 decades:
 - ▶ **8 out of 10** people who escaped poverty in the rural areas were lifted out of poverty by services
 - ▶ Nearly **9 out of 10** people who escaped poverty in the cities were lifted out of poverty by services.

FDI in Electricity Related Services as a Percent of All Services (2000 – 2012)



Note: Excluding Oil & Gas, Banking, Non-Bank Financial Institution, Insurance, Leasing, Investment

Source: BKPM (accessed on 08 March 2013)

Annual Growth Rate

Table 2. Annual growth (%)

Industrial Origin	2000 to 2012
1. Agriculture, Livestock, Forestry and Fishery	3.50
2. Mining and Quarrying	1.16
3. Manufacturing Industry	4.71
4. Electricity, Gas & Water Supply	7.56
5. Construction	6.98
6. Trade, Hotel & Restaurants	6.40
7. Transport and Communication	12.44
8. Finance, Real Estate and Business Services	6.76
9. Other Services	5.43
Gross Domestic Product	5.42

Source: BPS (accessed on 13 February 2013)

Jasa mempunyai multiplier efek terhadap sektor lainnya

SECTOR	BACKWARD LINKAGE Total output multiplier	FORWARD LINKAGE Total input multiplier
Electricity, gas and water	1.83	2.22
Construction	1.84	1.14
Wholesale & Retail	1.68	1.65
Restaurant and hotel	1.97	1.28
Rail transportation	2.06	1.54
Road transportation	1.77	1.82
Water transportation	1.74	1.52
Air transportation	1.70	1.56
Services allied to transport	1.59	2.07
Communication	1.30	1.74
Financial Intermediation	1.49	2.46
Real estate and Business Services	1.42	1.99
Government and defense	1.64	1.09
Education and Health (also, other social services)	1.72	1.10
Other Services (Recreation, Culture, and Sporting Services Personal Services)	1.63	1.91

Source: Backward Linkage - Domestic Transaction Inverse Matrix $(I-A^d)^{-1}$ Based on Producer Prices (BPS 2009) and Forward Linkage - Allocation of Domestic Transaction Output based on Producer Prices (BPS 2009)

KERJA SAMA PERDAGANGAN INTERNASIONAL

1. Meningkatkan akses Pasar barang dan jasa melalui kegiatan preferensi dan non preferensi;
2. Menurunkan hambatan perdagangan barang dan jasa;
3. Mengamankan kepentingan nasional di fora-fora perundingan;
4. Memperoleh *capacity building* dalam kerja sama tersebut.

Pada akhirnya mendorong pertumbuhan, meningkatkan kesejahteraan, dan berpartisipasi dalam mata rantai nilai dunia seraya berperan aktif menciptakan sistem dan praktek perdagangan yang lebih adil

KERJA SAMA PERDAGANGAN DI BERBAGAI FORA



BILATERAL

- FTA/CEPA/PTA
- *Joint Commissions, Trade & Investment Framework, Trade & Investment Working Groups*



ASEAN

- AEC 2015
- RCEP
- 5 ASEAN +1 FTA
- BIMP-EAGA, IMT-GT, Indian Ocean Rim Association for Regional Cooperation, etc



MULTILATERAL

- Perundingan DDA
- Perundingan Non DDA
- TPRM
- *Disputes* (ofensif, defensif)



APEC & ORGANISASI INTERNASIONAL LAINNYA

- *APEC Trade & Investment*
- G20, WEF, D8, OIC, UNCTAD
- Komoditi (karet, kopi, lada, kelapa, minyak sawit)



PERDAGANGAN JASA

- Peningkatan Kompetensi Stakeholders
- Perundingan jasa (bilateral, regional, multilateral)
- Peningkatan koordinasi kebijakan

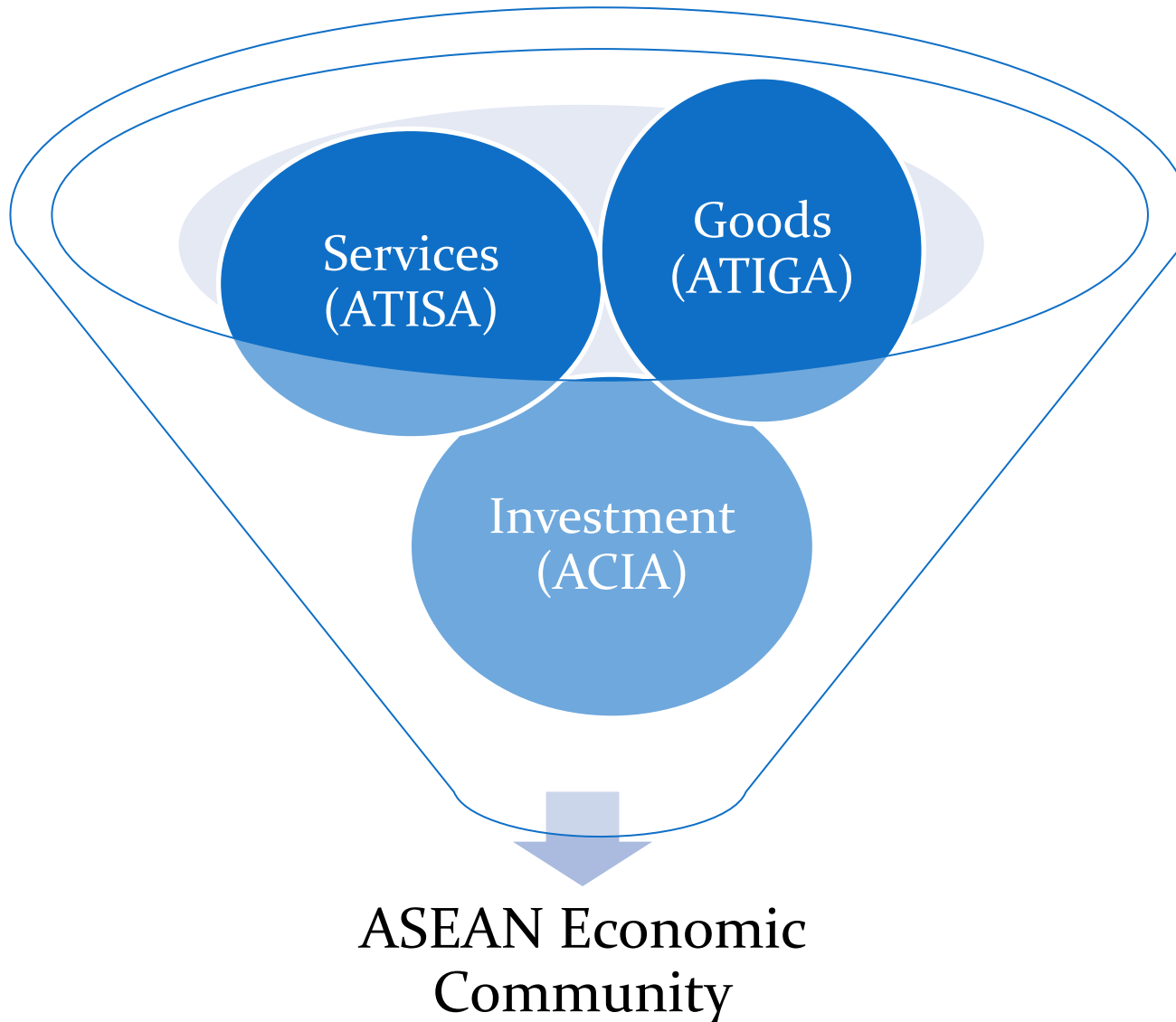
KOMITMEN PERDAGANGAN JASA

FORA ISU	MULTILATERAL	REGIONAL	ASEAN + MITRA	BILATERAL	ASEAN
Rules making/ Agreement	Aturan multilateral masih dibahas : Art 10 : Emergency Safeguard Measure Art 12 : Peraturan Domestik Art 16: Subsidi	On going negotiation for chapter trade in services RCEP	Agreement : ACFTA, AKFTA, AANZFTA, Proses ratifikasi : AIFTA, AFAS 9 Masih dibahas : AJCEP (TIS Chapter; Transparency list)	Agreement : IJ-EPA In-Progress : IKEPA, IEFTA, IAFTA	• ATISA, sedang dalam proses • Sentralisasi Perdagangan dan Ekonomi
Market Access (FEP)	35- 49 %	on going negotiation for appropriate approach	30 - 51 % (100%, hotel bintang 3,4,5)	49 – 55 %	70 % (2015) (100% Hotel bintang 3,4,5)
National Treatment	Ketentuan hambatan diskriminasi di DN	Ketentuan hambatan diskriminasi di DN (on going negotiation for appropriate approach)	Ketentuan hambatan diskriminasi di DN	Ketentuan hambatan diskriminasi di DN	Ketentuan hambatan diskriminasi di DN
Jml Sub Sektor	90	Will be negotiated in market access negotiation	ANZFTA : 88 AKFTA : 90 ACFTA : 28 AIFTA : 75	IJEPA: 83	AFAS 8 (86 SUB SEKTOR) Offer AFAS 9 (97 sub sektor)

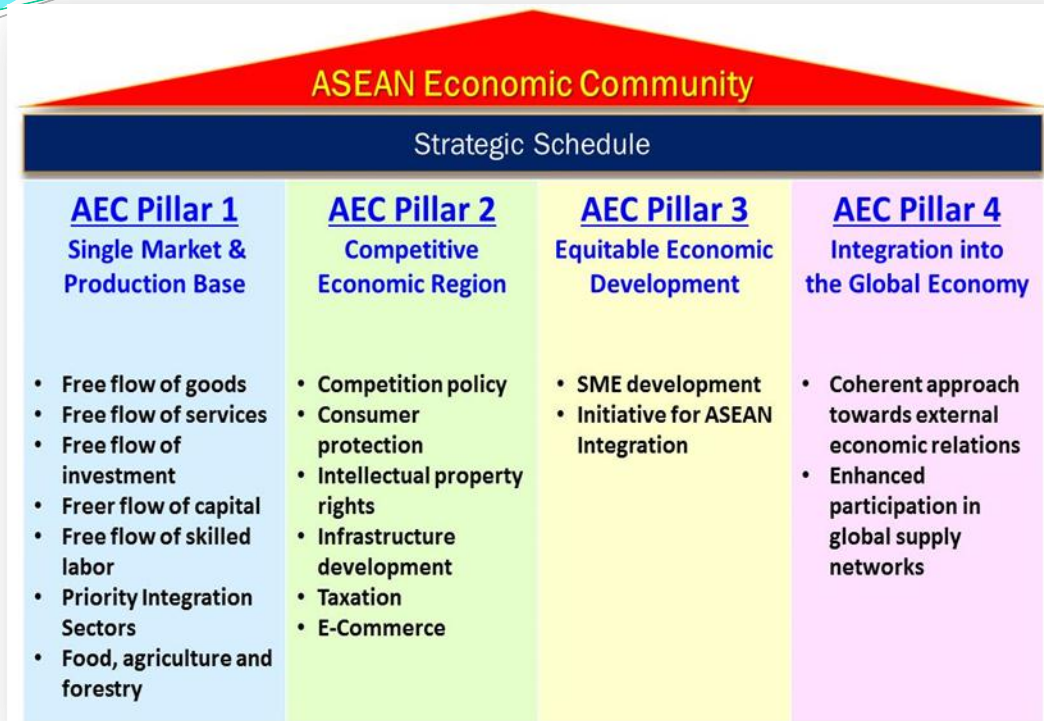


ASEAN ECONOMIC COMMUNITY 2015

AEC : Sebuah Proses Integrasi

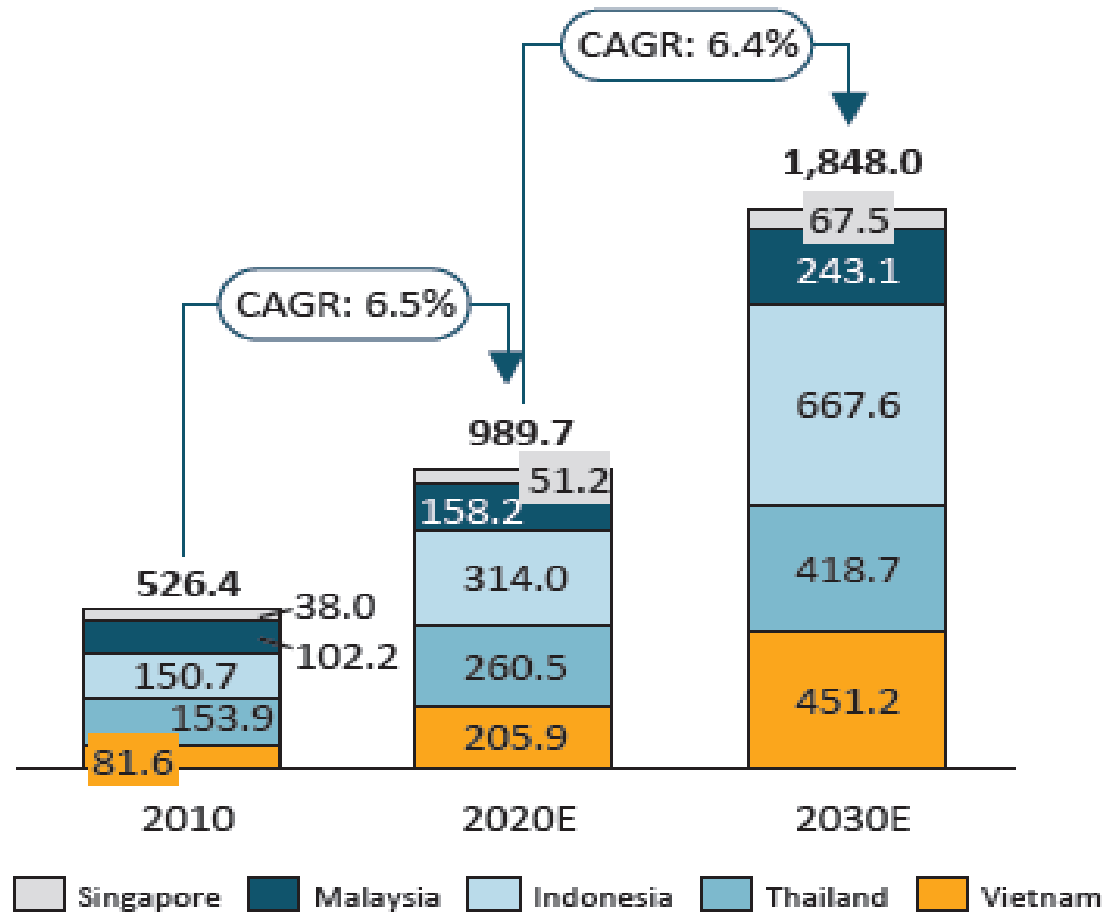


APA YANG TERJADI DI TAHUN 2015?



- Tingkat hambatan antar-anggota semakin minimal; aliran barang, jasa, investasi dan profesional bergerak bebas. Proses integrasi ini sudah berlangsung sejak awal 1990an.
- Peluang peningkatan perekonomian Indonesia, namun harus ada perubahan mindset dari semua pemangku kepentingan dalam menghadapi tantangan yang timbul.
- Kalangan bisnis, pemerintah Pusat/Daerah dan masyarakat harus berperan aktif dalam meningkatkan daya saing Indonesia untuk menjadi “*champion*” dalam AEC
- Jadikan ASEAN sebagai platform kebijakan Pusat/Daerah untuk memperkuat pasar dalam negeri dan meningkatkan kapasitas bersaing di pasar regional dan global

Sektor Energi di ASEAN: Konsumsi Listrik 5 negara ASEAN



Source: BP Statistical Review of World Energy June 2011, Energy Information Administration, Roland Berger

ASEAN Power Grid Existing Linkages

Number	Interconnected Systems	Capacity (MW)
1	Thailand - Peninsular Malaysia	
	Sadao - Bukit Keteri	80
	Khlong Ngae - Gurun	300
2	Thailand - P. Malaysia	
	Roi Et2 - Nam Theu 2	920
	Udon Thani 3 - Nabong	597
	Ubon Ratchathani 2 - Houay Ho	126
	Sakon Nakhon 2 - Theun Hinboun	210
3	Singapore - Peninsular Malaysia	2x200
4	Cambodia - Vietnam	135
5	Thailand - Cambodia (115 kV)	80

Source: Bambang Hermawanto, "Report of the 8th Meeting of APGCC," June 23, 2011, 2, http://www.hapuasecretariat.org/doc2011/Report%208_APGCC.pdf.

Sektor Tenaga Listrik Indonesia dan Perjanjian Perdagangan Internasional

Profil sektor energi Indonesia

Table 1. Resource Wealth of Indonesia

Resource	Consumption (2010)	Production (2010)	Proven Reserves (2010)	Export	Import
Oil	1357 tb/d ^a	1029.91 tb/d	4.2 tmb ^b	415.224 tb/d (Crude Oil & RPP ^c , 2008)	665.776 tb/d (Crude Oil & RPP, 2008)
Natural Gas	1.46 tcf ^d	3.406 tcf	106 tcf	1.457 tcf	0
Coal	54,228.207 thousand short tons ^e	370,378.82 thousand short tons	6,094.680 million short tons	316,151.72 thousand short tons	1.102 thousand short tons
Nuclear Energy	N/A	-	-	-	-
	Net Electricity Consumption 2010	Net Electricity Generation (2010)			
Non-Hydro renewables		8.561 bKWh ^f			
Hydroelectricity		11.325 bKWh			
Total Renewables	19.886	19.886 bKWh	-		

Source: U.S. Energy Information Administration (EIA), *International Energy Statistics*, <http://www.eia.gov/cfapps/lpdbproject/IEDIndex3.cfm>.

a. Thousand barrels per day.

d. Trillion cubic feet.

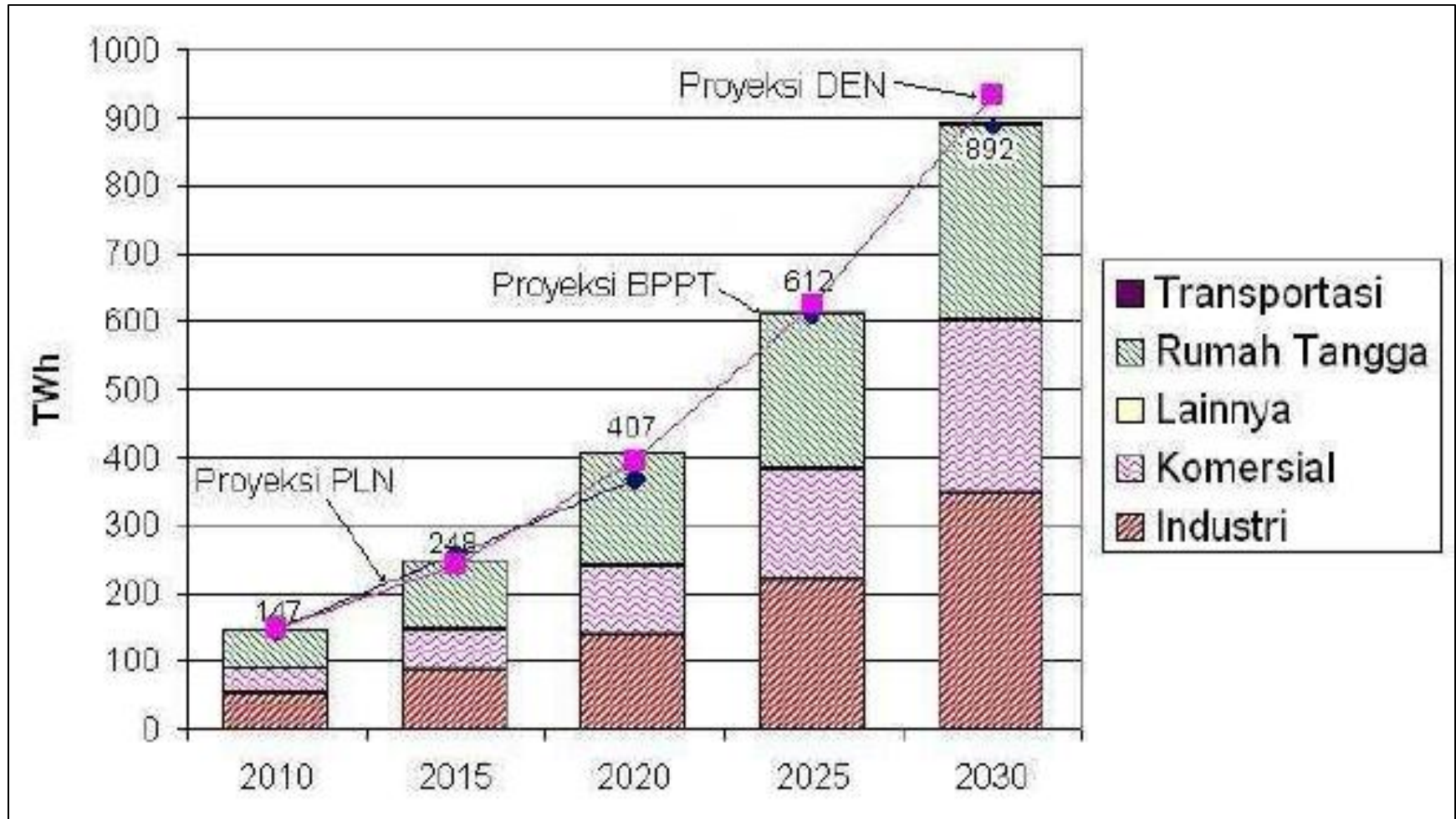
b. Thousand million barrels.

e. 2000 lbs.

c. Refined petroleum products.

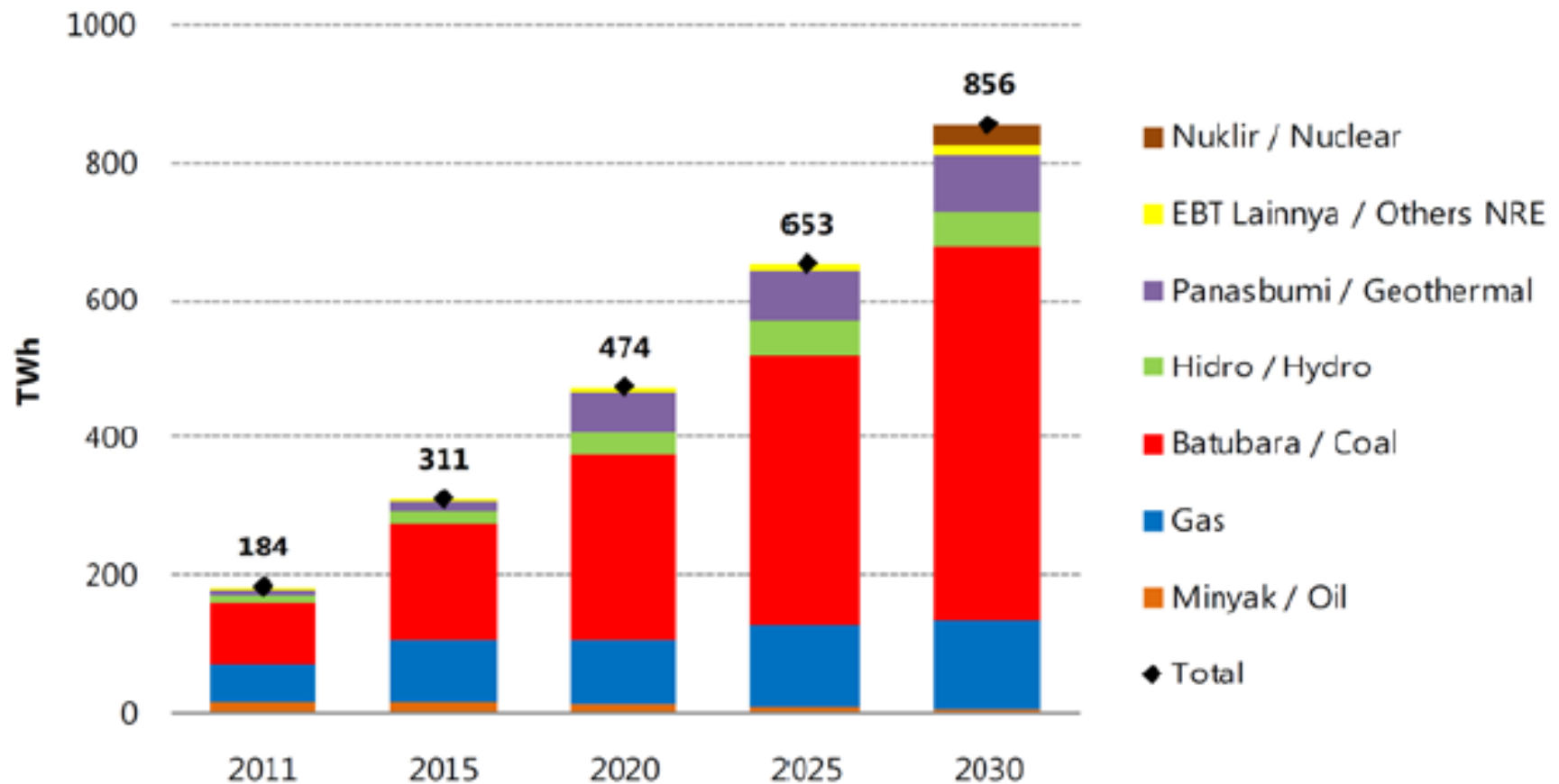
f. Billion kilowatt hours.

Proyeksi Permintaan Tenaga Listrik Indonesia (2010 – 2030)



Sumber : Outlook Kelistrikan Indonesia, BATAN 2013

Produksi Listrik Nasional dan Jenis Pembangkitnya



Sumber : Outlook Kelistrikan Indonesia, BATAN 2013

Sistem Klasifikasi Produk Jasa & Jasa Energi

- Dalam perundingan perdagangan internasional:
 - WTO: W/120
 - UNCTAD: *Central Product Classification* (CPC)
- Dalam Penghitungan Neraca Pembayaran: *Extended Balance of Payments Classification of Services* (EBOPS)
- Pada ketiga sistem klasifikasi yang sudah ada, jasa energi tidak memiliki klasifikasi tersendiri; Ada pembebasan untuk penggunaan klasifikasi dalam *offer*/komitmen
- Posisi Indonesia: menggunakan klasifikasi dari Kementerian ESDM dalam mengajukan *offer* dan/atau menetapkan komitmen dan menggunakan meminta sistem klasifikasi untuk mengajukan *request* Indonesia

Offer Indonesia di Sektor Jasa Energi (I)

Untuk konteks ASEAN, Indonesia pada sektor jasa energi telah memberikan komitmen untuk sektor-sektor berikut di AFAS 9:

- *Business Services on Technical Testing and Analysis Services (CPC 8676): Core Analysis and Other Lab Test, only for Isotope Analysis*–Klasifikasi nasional (1.A.2.7.3)
- *Business Services on Subsurface Surveying Services (CPC 8672): Geological and Geophysical Services, only for Seismic Data Acquisition* –klasifikasi nasional (1A.1.4.1.1.)
- *Services Incidental to Manufacturing (CPC 884): Liquefaction and Gasification only for Coal*–Klasifikasi nasional:
 - Coal liquefaction (2.4.4.4)
 - Coal Gasification (2.4.4.5)
- **Services Incidental to energy distribution (CPC 887): Exclusively covers only consultancy services related to operation of power plant and network**
- Transportation of petroleum and natural gas (CPC 7131): Transportation, Transmission and Distribution of Petroleum Product and Gas (2.2.7.1)

Offer Indonesia di Sektor Jasa Energi (II)

Selain subsektor yang tertulis di slide sebelumnya, Indonesia juga pernah memberi tambahan komitmen di AANZ-FTA dengan cakupan sebagai berikut:

- Engineering design services for industrial processes and production (CPC-86725): Engineering, Procurement and Construction (EPC) Services –klasifikasi nasional (1A.3.2.2.)
- **Technical Testing and Analysis Services (CPC-8676): Electrical Logging and Perforation –klasifikasi nasional (1A.2.8.)**
- Competency Certification in Quality Control and Handling of Aviation Fuels and Lubricants –klasifikasi nasional (4.2.2.9)
- **Competency Certification in Power Plant –klasifikasi nasional (4.2.2.11)**

Dapat terlihat bahwa Indonesia pada dasarnya sudah memberikan akses pasar untuk penyedia jasa asing untuk subsektor jasa yang terkait dengan tenaga listrik.

MATRIKS PERBANDINGAN KOMITMEN (LIMITASI AKSES PASAR)

SEKTOR JASA ENERGI

Sector / subsector	PERPRES 39 / 2014 DNI	Commitments				AKFTA
		AFAS ⁹	AJCEP offer	IJEPA	AANZ-FTA	
ENERGY SERVICES						
Engineering, Procurement and Construction (EPC) Services b. According to W 120 is under : engineering design services for industrial processes and production (CPC-86725)	-	No Commitment	No Offer	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment
Electrical Logging and Perforation a. According to Indonesia Proposal of Energy Services Classification is under: Electrical Logging and Perforation (EPC) Services (1A.2.8.) b. According to W 120 is under : Technical Testing and Analysis Services (CPC-8676)	-	No Commitment	No Offer	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment

MATRIKS PERBANDINGAN KOMITMEN (LIMITASI AKSES PASAR)

SEKTOR JASA ENERGI

Sector / subsector	PERPRES 39 / 2014 DNI	Commitments					
		AFAS ⁹	AJCEP offer	IJEPA	AANZ-FTA	AKFTA	
ENERGY SERVICES							
Services Incidental - to energy distribution (CPC 887) Exclusively covers only consultancy services related to operation of power plant and network	-	1) None 2) None 3) Joint venture with foreign equity participant up to 51%	No Offer	No Commitment	No Commitment	No Commitment	
Competency Certification in Power Plant a. According to Indonesia Proposal of Energy Services Classification is under : Competency Certification in Power Plant (4.2.2.11)	-	No Commitment	No Offer	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment	

MATRIKS PERBANDINGAN KOMITMEN (LIMITASI AKSES PASAR)

SEKTOR JASA ENERGI

MINISTRY OF TRADE

Sector / subsector	PERPRES 39 / 2014 DNI	Commitments				AKFTA
		AFAS 9	AJCEP offer	IJEPA	AANZ-FTA	
ENERGY SERVICES						
Competency Certification in Quality Control and Handling of Aviation Fuels and Lubricants a. According to Indonesia Proposal of Energy Services Classification is under : Competency Certification in Quality Control and Handling of Aviation Fuels and Lubricants (4.2.2.9) b. According to W 120 is under : Other education services (CPC-92900)	-	No Commitment	No Offer	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts. 1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts	No Commitment
Competency Certification in Power Plant a. According to Indonesia Proposal of Energy Services Classification is under : Competency Certification in Power Plant	-	No Commitment	No Offer	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment

31



PROGRAM PEMERINTAH & APA YANG PERLU DILAKUKAN

1. Peningkatan dan pengembangan ekspor jasa;
2. Peningkatan peran dan pemanfaatan diplomasi sektor jasa dalam upaya peningkatan akses pasar;
3. Penyusunan *blue print* perdagangan jasa Indonesia;
4. Peningkatan SDM sektor jasa yang berdaya saing global;
5. Penguatan regulasi domestik dalam rangka mendorong pengembangan daya saing sektor jasa;
6. Pengembangan infrastruktur (fisik, financial & ICT);

Align trade and investment policy at the sectoral level with long term national objectives.

Maximize synergies among sectors and ensure the ecosystem of policies provides consistent and mutually reinforcing support.

Policy and strategy to harness services trade and investment

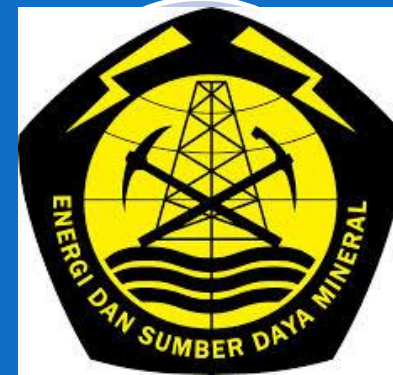
Develop flanking measures contemporaneously with market opening including support for addressing supply side measures.

Make available resources needed for effective policy making and regulation.

Koordinasi antar-Kementerian untuk Sektor Energi



Kemendag



Kemen ESDM



ESDM

- Lembaga Inspeksi Teknik (LIT)
- Lembaga sertifikasi Kompetensi (LSK)
- Lembaga Sertifikasi Badan Usaha (SBU)

KOMITE AKREDITASI NASIONAL

Lembagai inspeksi
Lembaga Sertifikasi

Sertifikasi :
ASEAN
mengadopsi
International
Standard



PEMERINTAH PUSAT & DAERAH

- Kerangka kebijakan nasional yang mendorong daya saing global
- Kebijakan daerah yang harmonis-inovatif-pro iklim usaha



DUNIA USAHA NASIONAL

- Penguatan strategi penguasaan domestik & ekspansi wilayah bisnis di ASEAN
- UMKM tingkatkan kapasitas & kualitas produk-jasa serta manfaatkan TI-modal-SDM-bahan baku



KALANGAN PEKERJA

- Ubah budaya kerja, pertajam kompetensi, spesialisasi keahlian & dorong produktivitas
- ASEAN sebagai pasar kerja potensial & basis pengembangan karir



DUNIA AKADEMIK

- Sistem menghasilkan manusia Indonesia optimis-kreatif-dinamis-berdaya saing
- Kembangkan tenaga vokasi handal-berkemampuan internasional

Apa yang harus ANDA lakukan?

مرحبا العالم! **Hallo Welt!**
Hej Värld! **Hello World!**
Ciao Mondo
ハローワールド!
iOlá mundo! 世界您好!
Salut le Monde!

Menguasai bahasa asing
baik bahasa Inggris
maupun bahasa asing
lainnya.



Meningkatkan keterampilan
melalui pelatihan dan
sertifikasi bertaraf ASEAN
dan Internasional.



Memperluas networking,
tidak hanya di Indonesia
tetapi juga di ASEAN.

- Memahami MRA dan ASEAN MNP Agreement beserta komitmennya dari semua negara anggota ASEAN.
- Mematuhi peraturan domestik di negara-negara ASEAN



100%
INDONESIA

Terima kasih

www.kemendag.go.id
http://ditjenkpi.kemendag.go.id/website_kpi/

MATRIKS PERBANDINGAN KOMITMEN (LIMITASI AKSES PASAR)

SEKTOR JASA ENERGI

MINISTRY OF TRADE

Sector / subsector	PERPRES 39 / 2014 DNI	Commitments					AKFTA
		AFAS ⁹	AJCEP offer	IJEPA	AANZ-FTA		
ENERGY SERVICES							
Core Analysis and Other Lab Test, only for Isotope Analysis a. According to Indonesia Proposal of Energy Services Classification is under : Isotope Analysis (1A.2.7.3) b. According to W 120 is under : Business Services on Technical Testing and Analysis Services (CPC 8676)	-	1) None 2) None 3) Joint venture with foreign equity participation up to 49%	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	
	-	1) None 2) None 3) Joint venture with foreign equity participation up to 49%	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	
Geological and Geophysical Services, only for Seismic Data Acquisition a. According to Indonesia Proposal of Energy Services Classification is under : Seismic Data Acquisition (1A.1.4.1.1.) b. According to W 120 Seismic Data Acquisition is under : Business Services on Subsurface Surveying Services (CPC 86752)	-	1) None 2) None 3) Joint venture with foreign equity participation up to 49%	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	

40

MATRIKS PERBANDINGAN KOMITMEN (LIMITASI AKSES PASAR)

SEKTOR JASA ENERGI

Sector / subsector	PERPRES 39 / 2014 DNI	Commitments					AKFTA
		AFAS 9	AJCEP offer	IJEPA	AANZ-FTA		
ENERGY SERVICES							
Liquefaction and Gasification only for Coal a. According to Indonesia Proposal of Energy Services Classification is under - Coal liquefaction (2.4.4.4) -Coal Gasification (2.4.4.5) a. According to W 120 is under : Services Incidental to Manufacturing (CPC 884)	Foreign capital ownershi max 49 %p	1) None 2) None 3) a. Joint operation through a representative office in Indonesia b. Joint venture with foreign equitu participation up to 51%	1) Unbound 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts. 1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	
Engineering, Procurement and Construction (EPC) Services a. According to Indonesia Proposal of Energy Services Classification is under : Engineering, Procurement and Construction (EPC) Services (1A.3.2.2.)	-	No Commitment	No Offer	No Commitment	1) None 2) None 3) Joint operation through a representative office in Indonesia 4) Unbound, except for directors and technical experts.	No Commitment	