1. COUNTRY OVERVIEW

2. LAKE TOBA PROFILE

3. INVESTMENT OPPORTUNITIES
COUNTRY OVERVIEW
President Joko Widodo (Jokowi) has established four super priority destinations, namely Lake Toba, Mandalika, Borobudur, and Labuan Bajo. All Facilities and Infrastructure for 4 New Bali Super Priorities must be completed by 2020.
Segala bentuk kendala regulasi harus kita sederhanakan, harus kita potong, harus kita pangkas...

“All kinds of bottlenecks in regulations must be simplified, must be cut and reduced”

Presiden Jokowi
Presiden Republik Indonesia
Pidato Pelantikan Presiden RI 2019-2024 di Sidang Paripurna MPR
10 PRIORITY TOURISM DESTINATIONS

DANAU TOBA
TANJUNG LESUNG
KEP. SERIBU
TANJUNG KELAYANG
BOROBUDUR
BROMO TENGGER SEMERU
MANDALIKA
LABUAN BAJO
WAKATOB
MOROTAI
TOURISM DEVELOPMENT TARGET 2020-2024

TARGET

To increase the image, competitiveness, and contribution of tourism sector in supporting the improvement of people's welfare and quality economic growth

1. Improvement of Industrial Competitiveness and Tourism Business Ecosystem
2. Improvement of Accessibility, Amenity, Attraction, and Tourism Destination Governance
3. Improvement of Human Resources Quality in Tourism Sector
4. Strengthening Tourism Image and Marketing Diversification

- Tourism Foreign Exchange: 32 Billion USD (2024)
- Tourism Foreign Exchange: 19.3 Billion USD (2018)
- GDP Tourism Contribution: 4.8% (2018), 5.5% (2024)
- Tourism Labor: 12.8 Million (2018), 15 Million (2024)
- Travel and Tourism Competitiveness Index: Ranked 40th (2019), Ranked 29th to 34th (2023)
- Foreign Tourist: 24 Million People (2024)
- Domestic Tourist: 303 Million Trips (2018), 350-400 Million Trips (2024)
- 303 Million Trips (2018)
- 15,8 Million People (2018)
- 15,8 Million People (2018)
- 15,8 Million People (2018)
FOREIGN EXCHANGE PROGRESSION IN TOURISM SECTOR

<table>
<thead>
<tr>
<th>Year</th>
<th>US$ Billion</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>10.05</td>
<td>Achievement of foreign exchange earnings of tourism sector in 2013</td>
</tr>
<tr>
<td>2014</td>
<td>11.17</td>
<td>Achievement of foreign exchange earnings of tourism sector in 2014</td>
</tr>
<tr>
<td>2015</td>
<td>12.23</td>
<td>Achievement of foreign exchange earnings of tourism sector in 2015</td>
</tr>
<tr>
<td>2016</td>
<td>13.46</td>
<td>Achievement of foreign exchange earnings of tourism sector in 2016</td>
</tr>
<tr>
<td>2017</td>
<td>16.76</td>
<td>Achievement of foreign exchange earnings of tourism sector in 2017</td>
</tr>
<tr>
<td>2018</td>
<td>19.29</td>
<td>Achievement of foreign exchange earnings of tourism sector in 2018</td>
</tr>
</tbody>
</table>

Source: Badan Pusat Statistik (BPS), 2019
NORTH SUMATERA TOURISM STATISTICS 2015-2018

FOREIGN TOURISTS

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>229.288</td>
</tr>
<tr>
<td>2016</td>
<td>233.643</td>
</tr>
<tr>
<td>2017</td>
<td>270.292</td>
</tr>
<tr>
<td>2018</td>
<td>231.465</td>
</tr>
</tbody>
</table>

DOMESTIC TOURISTS

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>9.7 Million</td>
</tr>
<tr>
<td>2016</td>
<td>10.8 Million</td>
</tr>
<tr>
<td>2017</td>
<td>14 Million</td>
</tr>
<tr>
<td>2018</td>
<td>12.1 Million</td>
</tr>
</tbody>
</table>

FOREIGN TOURISTS IN NORTH SUMATERA FROM 4 (FOUR) GATE 2018

- 96.98% Kualanamu Airport
- 2.24% Silangit Airport
- 0.55% Tanjung Balai Asahan Port
- 0.03% Belawan Port

Source: Badan Pusat Statistik (BPS), 2019
TOP 10 FOREIGN TOURISTS THROUGH GATE 2018

SILANGIT AIRPORT

KUALANAMU AIRPORT
LAKE TOBA TOURISM AUTHORITY

Lake Toba Tourism Authority, established based on Presidential Decree 49 of 2016, is a professionally-managed Public Service Agency that is able to prioritize the synchronization and stakeholder coordination effort, which relates to investment and business of tourism industry, between Local Government, Central Government and Community.

The Lake Toba Tourism Authority has the following tasks:
1. To Facilitate Coordination, Synchronization, Planning and Development within Lake Toba Destination
2. To Conduct Planning, Development, and Management within Designated Development Area
3. To Promote tourism in Lake Toba Destination

ADVISORY BOARD (13 Ministers + 1 Governor)
Chairman: Coordinating Minister for Maritime Affairs
Chairman of Daily Executive: Minister of Tourism

EXECUTING BOARD
LAKE TOBA PROFILE
NORTH SUMATRA AND LAKE TOBA OVERVIEW

North Sumatra
North Sumatra is the 7th biggest province by regional GDP. It has 14M with a growth rate at ~1.8% per year. Income per capita is around IDR 44M per year. Employment rate is at 70% with a low minimum wage level of under IDR 2M per month.

Highlights of LAKE TOBA
• Lake Toba is one of the four special priority destinations assigned by the Government.
• The largest volcanic lake in the world and the second largest lake in the world after Victoria Lake in Africa.
• One out of ten deepest lake in the world, reaching around 500 meters deep.

The distinctive geographical of Lake Toba reserves a number of economic potentials for the benefit of the wide range of communities, especially as a source of bountiful fresh water and lust tropical forest which attract the interest of big industries to invest in the areas.

Key Tourism Areas:
.arraycopy(0,0,0) • Parapat in Simalungun Regency
• Samosir Island in Samosir Regency
• Balige in Toba Samosir Regency
The Toba super-eruption 74,000 years ago was much bigger than Tambora or the more recent 1991 Pinatubo eruptions, spreading some 1,000 cubic kilometers of ash over all of South Asia.
The Indonesian Government proposes national geoparks Toba, to be enlisted as UNESCO Global Geoparks. This was conveyed during the Asia Pacific Geoparks Networks (APGN) 2019 which is held in Lombok, West Nusa Tenggara, on August 30 to September 6.
DEVELOPMENT SCENARIO

TOURISM DESTINATION CONCEPT

Key Tourism Area (KTA) / N-KTA
- Parapat + Sibisa
- Simanindo
- Pangururan
- Balse
- Merek
- Muara – Baktiraja

Cluster / Extended KTA
- Tourism Corridor
- Tourism Gate - Road
- Tourism Gate - Air

Source: Integrated Tourism Master Plan, 2019
## VISITOR GROWTH SCENARIO

with economic, demographic and land use impacts (TDA, 2045)

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Present</th>
<th>'Moderate'</th>
<th>'Optimistic'</th>
<th>'National Policy'</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic visitors</td>
<td>1,734.00</td>
<td>3,769.00</td>
<td>5,144.00</td>
<td>5,144.50</td>
</tr>
<tr>
<td>Foreign visitors</td>
<td>121.900</td>
<td>358.3300</td>
<td>464.300</td>
<td>2,000.000</td>
</tr>
<tr>
<td><strong>TOTAL VISITORS</strong></td>
<td>1,856.000</td>
<td>4,127.000</td>
<td>5,608.000</td>
<td>7,144.500</td>
</tr>
<tr>
<td>GDP contribution (IDR trillion)</td>
<td>1.68</td>
<td>13.8</td>
<td>17.8</td>
<td>23.9</td>
</tr>
<tr>
<td>Employment (total)</td>
<td>39.600</td>
<td>87.600</td>
<td>118.600</td>
<td>150.600</td>
</tr>
<tr>
<td>Employment growth</td>
<td>0</td>
<td>+48.000</td>
<td>+79.000</td>
<td>+111.000</td>
</tr>
<tr>
<td>Net migration effect</td>
<td>0</td>
<td>+48.000</td>
<td>+79.000</td>
<td>+111.000</td>
</tr>
<tr>
<td>Population growth</td>
<td>0</td>
<td>+76.000</td>
<td>+107.000</td>
<td>+139.000</td>
</tr>
<tr>
<td><strong>Total population</strong></td>
<td>437.000</td>
<td>513.000</td>
<td>544.000</td>
<td>576.000</td>
</tr>
<tr>
<td>Extra rooms needed</td>
<td>0</td>
<td>+3.155</td>
<td>+9.005</td>
<td>+18.885</td>
</tr>
<tr>
<td><strong>Total rooms needed</strong></td>
<td>6.160</td>
<td>9.315</td>
<td>15.165</td>
<td>25.045</td>
</tr>
<tr>
<td>Extra land requirements (ha)</td>
<td>0</td>
<td>+1.885</td>
<td>+2.660</td>
<td>+4.175</td>
</tr>
</tbody>
</table>

Source: Draft Integrated Tourism Master Plan, September 2019

1. Moderate scenario that may result from a continuation of present policies.
2. Optimistic scenario that should be the outcome of positive demographic and economic developments in the most important origins, combined with an ambitious program of improvements for Lake Toba as a destination.
3. National policy scenario that aims at realising a future level of 2 million foreign visitors per year, in accordance with a policy target for Indonesia as a whole, set by the Government at 74 million foreign visitors in 2045.
ROOM PROJECTIONS

Source: Draft Integrated Tourism Master Plan, August 2019
Source: Draft Integrated Tourism Master Plan, August 2019
HOW TO GET TO LAKE TOBA?

**Kualanamu Airport (KNO)**
*International Direct Flights:*
Amsterdam, Kuala Lumpur, Singapore, Bangkok

*Domestic Direct Flights:*
Jakarta, Bandung, Surabaya, Yogyakarta, Makasar, Batam, Banda Aceh, etc

**Silangit Airport (DTB)**
*Domestic Direct Flights:*
Jakarta, Kualanamu, Batam

*International Direct Flights:*
Kuala Lumpur

**Sibisa Airport (SIW)**
Open for special flights

“Special arranged (charter flight) is available on request”
TOP 5 FOREIGN VISITOR’S ORIGIN COUNTRY

1. Malaysia
2. Singapore
3. China
4. Germany
5. Australia
TOURISM TREND IN LAKE TOBA

RELIGIOUS

EDUCATION

GEOPARK
1. Kuala Tanjung - Tebing Tinggi – Parapat Toll Road
2. Samosir Ring Road
3. Tomok Area Redevelopment
4. Channel Widening & New Bridge of Tano Ponggol and Pangururan Waterfront City
5. Tele Geopark Tourism
6. Huta Ginjang Area Redevelopment Plan
7. Lumban Pea Tourism Area Plan
8. Lumban Julu Rest Area Plan
9. Structuring the Dolok Sipiak Region
10. Parapat Public Open Space (Opposite Atsari Hotel)
11. Balerong Revitalisation in Balige City

KUALANAMU INTERNATIONAL AIRPORT
TEBING TINGGI
KUALA TANJUNG
INDRAPURA
PARAPAT
Lubuk Pakam
Medan
Sdikalang
Birjai
Bali

Highway
Ring Road Samosir
INFRASTRUCTURE UPDATES
Medan – Tebing Tinggi Toll Road

Medan-Kualanamu-Tebing Tinggi toll road has been operating 100% with the operation of the Kualanamu - Tebing Tinggi toll road in April 2019
Tebing Tinggi – Siantar: 58 km is on progress construction and targeted to operate on Q3 2020
Siantar - Parapat: 50 km is in the stage of land acquisition
INFRASTRUCTURE UPDATES

AJIBATA PORT

AMBARITA PORT

RINGROAD (NATIONAL ROAD)

TO MEDAN CITY

TO KUALANAMU INTERNATIONAL AIRPORT

P.SIANTAR CITY

FUTURE TOLL ROAD - TEBING TINGGI TO P.SIANTAR SECTION OPERATE BY 2020

FUTURE RAILWAY P.SIANTAR - LAKE TOBA

SHIPS OPERATE

546GT (2017-2018)

300GT (2018-2019)

200GT (2019-2020)

2 BUS AIR (2019-2020)

UPGRADING RAILWAY MEDAN - P.SIANTAR

SHIPS DEVELOPMENT

AMBARITA PORT

TONGGING

MEREK CITY

TIGARAS

SIMANINDO

PANGURURAN CITY

PARAPAT CITY

SIBISA AIRPORT

SIPINGGAN

ONAN RUNGGU

BALIGE

BALIGE CITY

SIBORONG-BORONG CITY

DOLOK SANGGUL CITY

SILANGIT INTERNATIONAL AIRPORT

INFRASTRUCTURE UPDATES
Phase I Initial Development in 2019 (4 Billion Rupiah)
Phase II Development / Complete in 2020 (16 Billion Rupiah)

By end 2019 (44 Billion Rupiah)
In 2020 / Complete (30 Billion Rupiah)

Phase I in 2019 (3 Billion Rupiah)
Phase II in 2020 (18 Billion Rupiah)

By end 2019 (63 Billion Rupiah)
In 2020 / Complete (63 Billion Rupiah)

By end 2019 (27 Billion Rupiah)
In 2020 / Complete (38 Billion Rupiah)

In 2018 (43 Billion Rupiah)
In 2019 (29.8 Billion Rupiah)
In 2020 / Complete (7.5 Billion Rupiah)

Phase I in 2019 (8 Billion Rupiah)
Phase II in 2020 (52 Billion Rupiah)

By end 2019 (23 Billion Rupiah)
In 2020 / Complete (35 Billion Rupiah)

New / continued development activities in 2019
New development activities in 2020

by Ministry of Transportation Republic of Indonesia
The name of the “Kaldera” originates from the word “Caldera”, which means the crater formed by volcano eruption.
The Kaldera is a pioneering project initiated by the Lake Toba Tourism Authority that showcases several Nomadic Tourism products in one convenient location, just 5 minutes from Sibisa airport and a short 10-minute cross by boat to Samosir island.

The Kaldera is developed with meticulous planning towards responsible and eco-friendly development. From the very beginning, the team mapped the existing conditions before clearing up the land, and carefully look into the unique characteristics of the land and its natural surrounding, such as pine trees, the coffee plantation and undulating topography. These major elements are well-preserved and maintained to create a strong character to the entire development. Community involvement and empowerment are crucial part of this development as well. The Kaldera is delicately built with the helping hands of three surrounding villages, creating strong bond between local communities and Lake Toba Tourism Authority.
GROUNDBREAKING “TOBA CALDERA RESORT” – 14 OCT 2019

Inauguration signing "Toba Caldera Resort" by the Coordinating Minister for Maritime and Investment Affairs

Field survey to the southern main road of Toba Caldera Resort

Signing of Conditional Land Utilization and Development Agreement by the President Director of Lake Toba Tourism Authority and investors

Beating the gordang sambilan (drums) to mark the inauguration of Toba Caldera Resort

Mangulosi ceremony (Batak ritual) by tribal elders to the ministers and investors

Groundbreaking ceremony of glamorous camping development by one of the investors
INVESTMENT OPPORTUNITIES
Toba Caldera Resort
Loc.: Toba Samosir Regency
Area: +386,72 Ha

Integrated Resort “Flower Garden”
Loc.: Humbang Hasundutan & North Tapanuli Regencies
Area: ±1,247 Ha

Coordinative Area
Include 8 Regencies
Area: ±300,000 Ha
Lake Toba Investment Plan: TOBA CALDERA RESORT

An integrated resort complex located on the cliffs surrounding the naturally sculpted Lake Toba

Resort Concept that incorporate nature, culture and technology into an Integrated Eco Resort.

The resort is aimed not only to celebrate its majestic nature, but also to elevate local communities and to rebrand the local wisdom, history, and culture of Lake Toba.

It also initiates a cutting-edge, engaging educational experience on the history of Lake Toba, a massive caldera created by a supervolcanic eruption 1.2 million years ago; together with its culturally rich communities that live around lake toba.
To create a unique ecofriendly and sustainable tourism destination in Toba that develops and empowers local communities by integrating technology, diversity, and innovation.
TOBA CALDERA RESORT

Masterplan Concept

Natural Tourism
Marvelous geological attraction at one of the greatest supervolcano on earth

Heritage Tourism
Heartwarming Batakneese cultural & historical pilgrimage at the heart of North Sumatera

Leisure Tourism
Vibrant and lively creative villages that enliven the local economy

Community Tourism
Serene retreating resorts and lakeside delights at the natural wonder of Toba Highland
Lake Toba Investment Plan: TOBA CALDERA RESORT

THEMATIC CONCEPT

North Ridge
- Serene
- Exclusive
- Wellness

Central Village
- Celebration
- Vibrant
- Integrated
- Cultural

South Ridge
- Leisure
- Adventure
- Active
- Luxury

Average of 50 Roomkeys/ Ha
### Land Use Plan

<table>
<thead>
<tr>
<th>Land use</th>
<th>Total (m²)</th>
<th>Total (Ha)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/ Resort</td>
<td>1,325,704</td>
<td>132,57</td>
<td>34.38%</td>
</tr>
<tr>
<td>Commercial</td>
<td>91,752</td>
<td>9,18</td>
<td>2.38%</td>
</tr>
<tr>
<td>Geo Cultural Park</td>
<td>91,941</td>
<td>9,19</td>
<td>2.38%</td>
</tr>
<tr>
<td>The Kaldera</td>
<td>22,808</td>
<td>2,28</td>
<td>0.59%</td>
</tr>
<tr>
<td>BPODT Office</td>
<td>9,610</td>
<td>0,96</td>
<td>0.25%</td>
</tr>
<tr>
<td>Tourism Academy</td>
<td>22,028</td>
<td>2,20</td>
<td>0.57%</td>
</tr>
<tr>
<td>MICE</td>
<td>88,706</td>
<td>8.87</td>
<td>2.30%</td>
</tr>
<tr>
<td>Healthcare Facilities</td>
<td>13,139</td>
<td>1.31</td>
<td>0.34%</td>
</tr>
<tr>
<td>Cultural Centre</td>
<td>19,861</td>
<td>1.99</td>
<td>0.52%</td>
</tr>
<tr>
<td>UMKM Centre</td>
<td>9,244</td>
<td>0.92</td>
<td>0.24%</td>
</tr>
<tr>
<td>Flower Garden</td>
<td>46,848</td>
<td>4.68</td>
<td>1.21%</td>
</tr>
<tr>
<td>Botanical Garden</td>
<td>157,212</td>
<td>15.72</td>
<td>4.08%</td>
</tr>
<tr>
<td>Golf</td>
<td>757,789</td>
<td>75.78</td>
<td>19.65%</td>
</tr>
<tr>
<td>BOH (Back of House)</td>
<td>18,684</td>
<td>1.87</td>
<td>0.48%</td>
</tr>
<tr>
<td>Utilities</td>
<td>69,029</td>
<td>6.90</td>
<td>1.79%</td>
</tr>
<tr>
<td>Road</td>
<td>454,295</td>
<td>45.43</td>
<td>12%</td>
</tr>
<tr>
<td>Carriage way</td>
<td>142,856</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median</td>
<td>15,328</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROW Green Buffer</td>
<td>296,111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Open Space</td>
<td>632,271</td>
<td>63.23</td>
<td>16%</td>
</tr>
<tr>
<td>Body of Water</td>
<td>24,943</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>3,855,864</td>
<td>386</td>
<td>100%</td>
</tr>
</tbody>
</table>
Thank You