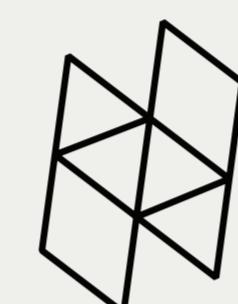


INDONESIA'S URBAN STORY

 **City Form Lab**

at the Harvard Graduate School of Design | cityform.gsd.harvard.edu



**Harvard University
Graduate School of Design**



THE WORLD BANK



Schweizerische Eidgenossenschaft
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This exhibition is a production by the City Form Lab at the Harvard University Graduate School of Design, in collaboration with World Bank Indonesia. It tells a visual story about the state of urbanization in Indonesia using data visualizations and photographs taken in a number of Indonesian cities in the fall of 2015. The exhibit was developed in conjunction with a World Bank publication "Indonesia's Urban Story" (2016), with financial support from Swiss State Secretariat for Economic Affairs (SECO) through the Indonesia Sustainable Urbanization Multi-Donor Trust Fund (IDSUN).

Pameran ini dibuat oleh City Form Lab - Harvard University Graduate School of Design, bekerja sama dengan kantor perwakilan Bank Dunia di Indonesia. Pameran ini berisi kisah visual mengenai kondisi urbanisasi di Indonesia dengan menggunakan visualisasi data dan foto yang diambil di sejumlah kota di Indonesia pada triwulan ketiga dan keempat tahun 2015. Pameran ini dipersiapkan bersamaan penerbitan publikasi Bank Dunia berjudul "Kisah Perkotaan Indonesia" (2016).

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01 INTRODUCTION

Indonesia is undergoing a major and rapid structural transformation, from a predominantly rural and agriculture-based economy, to an urban and services-based economy. This structural shift is significant, as increasing urban formal employment and associated productivity gains will drive Indonesia's ability to generate and share prosperity. However, a large urban infrastructure deficit, slow gains in labor productivity, and rising inequality pose challenges to future growth and prosperity.

Indonesian cities are growing at a rate that exceeds other Asian countries. The urban population increased at an average annual rate of 4.1 percent between 2000 and 2010 (compared to 3.8 percent in China, 3.1 percent in India and 2.8 percent in Thailand) (World Bank 2012). In 2012, the urban population reached over 52 percent of total population. By 2025, an estimated 68 percent of Indonesians will live in urban areas (World Bank 2014).

In Indonesia, as in other countries, urbanization has occurred in tandem with economic growth, rising incomes and poverty reduction. In 2010, over 44% of Indonesia's non-petroleum GDP was produced in cities (Lewis 2014). Of the 21 million jobs that were created from 2001 to 2011, 18 million were in urban areas and 17 million were generated in the services sector, marking a major shift of the employment base towards cities.

Yet, Indonesia is not benefiting from all the positive returns to urbanization that other countries have experienced. Many Indonesian cities suffer from 'diseconomies of scale', such as severe traffic congestion, pollution and disaster risks. In Jakarta, congestion is estimated to cost approximately US\$6.5 billion annually (JICA and Bappenas 2004). Serious flooding affected 17% of the Jakarta metropolitan area in 2014, displacing 64,000 people (Ika 2014).

A deficit in urban infrastructure is limiting the ability of Indonesia's cities to deliver shared prosperity and poverty reduction. Urban infrastructure quality is poor in Indonesia, and access to basic services, such as clean water, sanitation, electricity, and transportation, has remained generally limited and not well distributed. In 2009, only 50 percent of urban population had access to safe water, while sewerage coverage only existed in 11 cities, with 2 percent of urban population having access to centralized sanitation systems (World Bank 2014).

This exhibit offers an overview of some of Indonesia's urban challenges, exploring the role of cities in driving sustainable social and economic development. It focuses on five themes that characterize the growth and development of Indonesia's cities: housing, transportation, land management, disaster risk management, and solid waste management.

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01 PENDAHULUAN. Indonesia sedang mengalami transformasi struktural besar-besaran yang berjalan cepat, dari perekonomian perdesaan berbasis pertanian, menjadi perekonomian perkotaan berbasis jasa. Ini perubahan struktural yang signifikan, karena meningkatnya lapangan kerja formal di perkotaan dan produktivitas terkait akan mendorong kemampuan Indonesia untuk menciptakan dan berbagi kemakmuran. Akan tetapi, besarnya defisit infrastruktur perkotaan, lambatnya peningkatan produktivitas tenaga kerja, dan membesarnya ketimpangan menjadi tantangan bagi pembangunan dan kesejahteraan di masa mendatang.

Kota-kota di Indonesia tumbuh dalam laju yang lebih cepat dibandingkan dengan negara Asia lainnya. Jumlah penduduk perkotaan meningkat rata-rata 4,1 persen setiap tahun antara tahun 2000 sampai 2010 (bandingkan dengan 3,8 persen di Cina, 3,1 persen di India, dan 2,8 persen di Thailand) (Bank Dunia 2012). Di tahun 2012, jumlah penduduk perkotaan mencapai lebih dari 52 persen penduduk di Indonesia. Di tahun 2025, diperkirakan 68 persen penduduk Indonesia akan tinggal di daerah perkotaan (Bank Dunia 2014).

Sama seperti di negara lainnya, urbanisasi di Indonesia berkembang seiring dengan pertumbuhan ekonomi, kenaikan penghasilan, dan pengurangan kemiskinan. Pada tahun 2010, lebih dari 44 persen PDB nonmigas Indonesia dihasilkan di kota (Lewis 2014). Dari 21 juta pekerjaan yang tercipta sejak tahun 2001 hingga 2011, 18 juta di antaranya berada di daerah perkotaan dan 17 juta dihasilkan oleh sektor jasa, menandakan terjadinya peralihan besar basis lapangan kerja ke kota-kota.

Sayangnya, Indonesia belum memperoleh berbagai manfaat positif urbanisasi seperti yang dialami negara lain. Banyak kota di Indonesia yang mengalami 'diseconomies of scale', yaitu menurunnya skala keekonomian, seperti kemacetan lalu lintas, polusi, dan meningkatnya risiko bencana. Di Jakarta, kemacetan diperkirakan mengakibatkan kerugian kira-kira US\$6,5 miliar setiap tahunnya (JICA dan Bappenas 2004). Banjir besar pada tahun 2014 berdampak pada 17 persen daerah metropolitan Jakarta dan 64.000 orang diungsikan (Ika 2014).

Defisit infrastruktur perkotaan membatasi kemampuan kota-kota di Indonesia untuk mewujudkan kemakmuran bersama dan mengurangi kemiskinan. Mutu infrastruktur perkotaan di Indonesia tetap tergolong buruk, dan akses ke layanan dasar seperti air bersih, sanitasi, penyediaan listrik, dan transportasi umumnya terbatas dan tidak terdistribusi dengan baik. Di tahun 2009, hanya 50 persen dari penduduk perkotaan dapat mengakses air bersih. Jaringan saluran pembuangan hanya ada di 11 kota. Hanya 2 persen dari warga perkotaan dapat mengakses sistem sanitasi tersentralisasi (Bank Dunia 2014).

Pameran ini memberi gambaran umum mengenai sejumlah tantangan perkotaan di Indonesia, dan menggali lebih jauh peran kota dalam mendorong pembangunan sosial dan ekonomi berkelanjutan. Pameran ini difokuskan pada lima tema yang mencirikan pertumbuhan dan perkembangan kota-kota Indonesia: perumahan, transportasi, pengelolaan lahan, manajemen risiko bencana, dan pengelolaan limbah padat.

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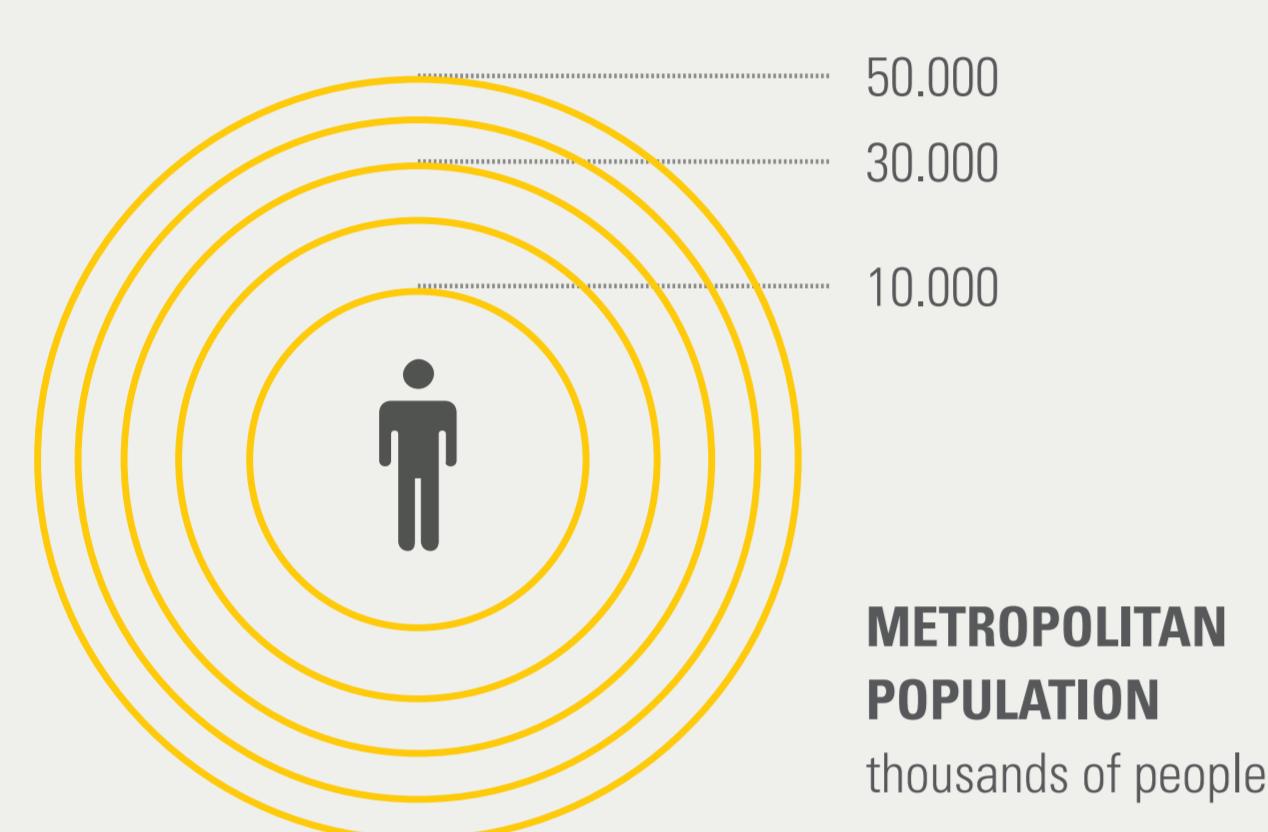


JAKARTA IS ONE OF THE WORLD'S LARGEST METROPOLISES

THE PRIMACY OF JAKARTA WITHIN INDONESIA IS SIMILAR TO THAT OF PRIMATE CITIES IN OTHER ASIAN COUNTRIES, EXCEPT CHINA AND INDIA.

ASIA'S LARGEST CITIES

Population of metropolitan areas, and urban population share



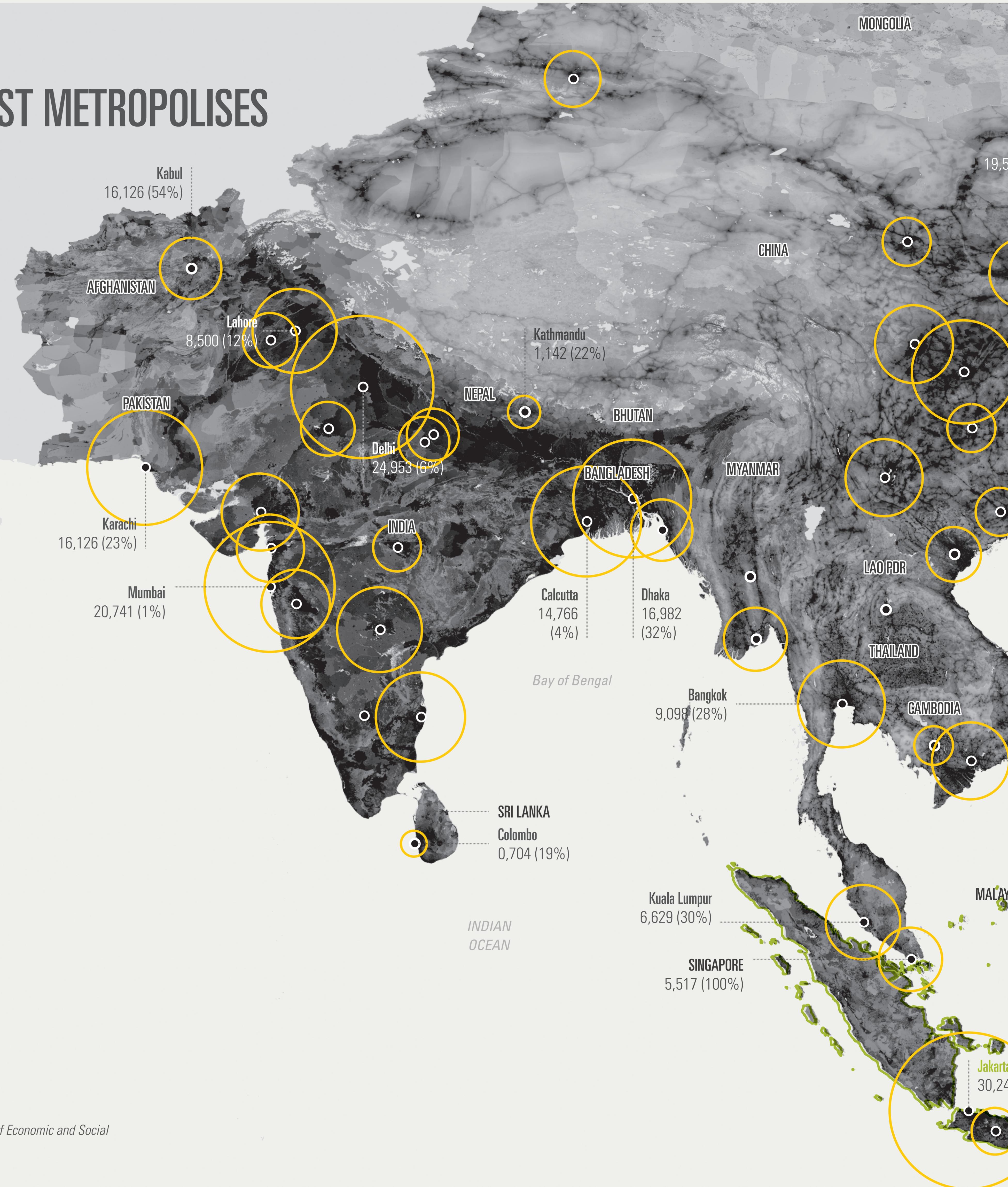
POPULATION DENSITY

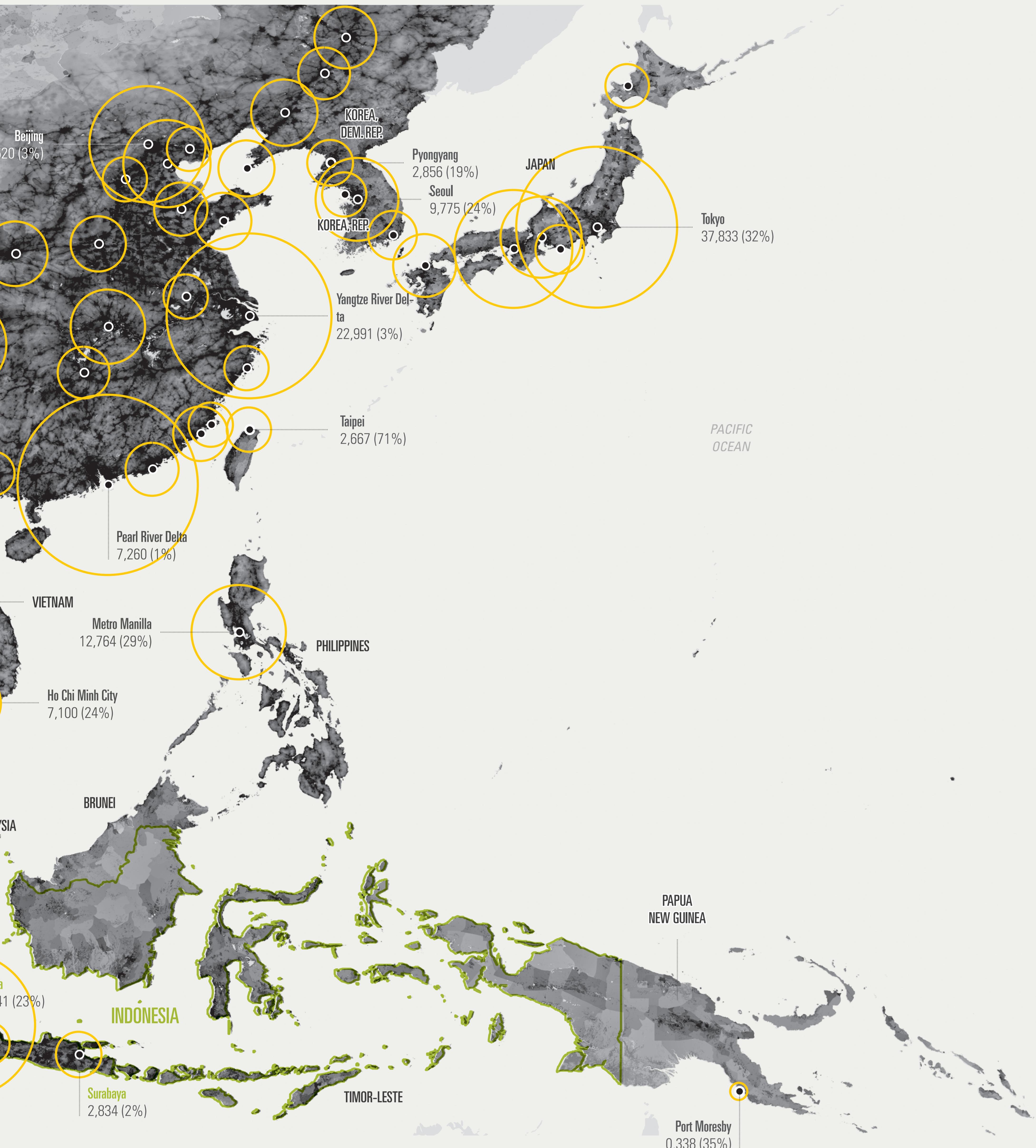
concentration of people

Source: WorldPop. United Nations, Department of Economic and Social Affairs, Population Division (2014).

Many inner-city kampungs are located in prime locations, where real-estate pressures to redevelop at higher densities are significant. Lack of clear formal title to land and improvements along with unclear zoning rules can contribute to their speculative vulnerability. Photo: Tunjungan, Surabaya.

Banyak daerah perkampungan kota berada di lokasi utama, dimana permintaan dari pihak pengembang untuk dapat membangun area tersebut dengan kepadatan yang semakin besar cukup signifikan. Tidak adanya bukti kepemilikan formal yang jelas terhadap tanah dan bangunan di atasnya serta aturan zonasi yang tidak jelas turut berkontribusi menjadikan kampung tersebut semakin rentan. Foto: Tunjungan, Surabaya.





Investments in infrastructure have gone disproportionately to small cities over large cities, where the capacity to make use of financing is limited and where the impact of infrastructure will affect a smaller proportion of people. This is the result of an effort to decentralize growth throughout Indonesia.

Investasi infrastruktur lebih banyak diarahkan untuk kota kecil dibandingkan kota besar, meskipun kemampuannya dalam memanfaatkan dana tersebut masih terbatas, serta manfaat infrastruktur yang dibangun hanya dirasakan sejumlah kecil penduduk. Kondisi ini salah satu upaya desentralisasi pertumbuhan di Indonesia.



Indonesia is the

4th

IN 2012

largest country
in the world

IN 2030

It was the

16th

largest economy

7th

largest economy

52%

of the population lived
in cities producing

71%

will live in cities and produce

74%

of the GDP in the country.

86%

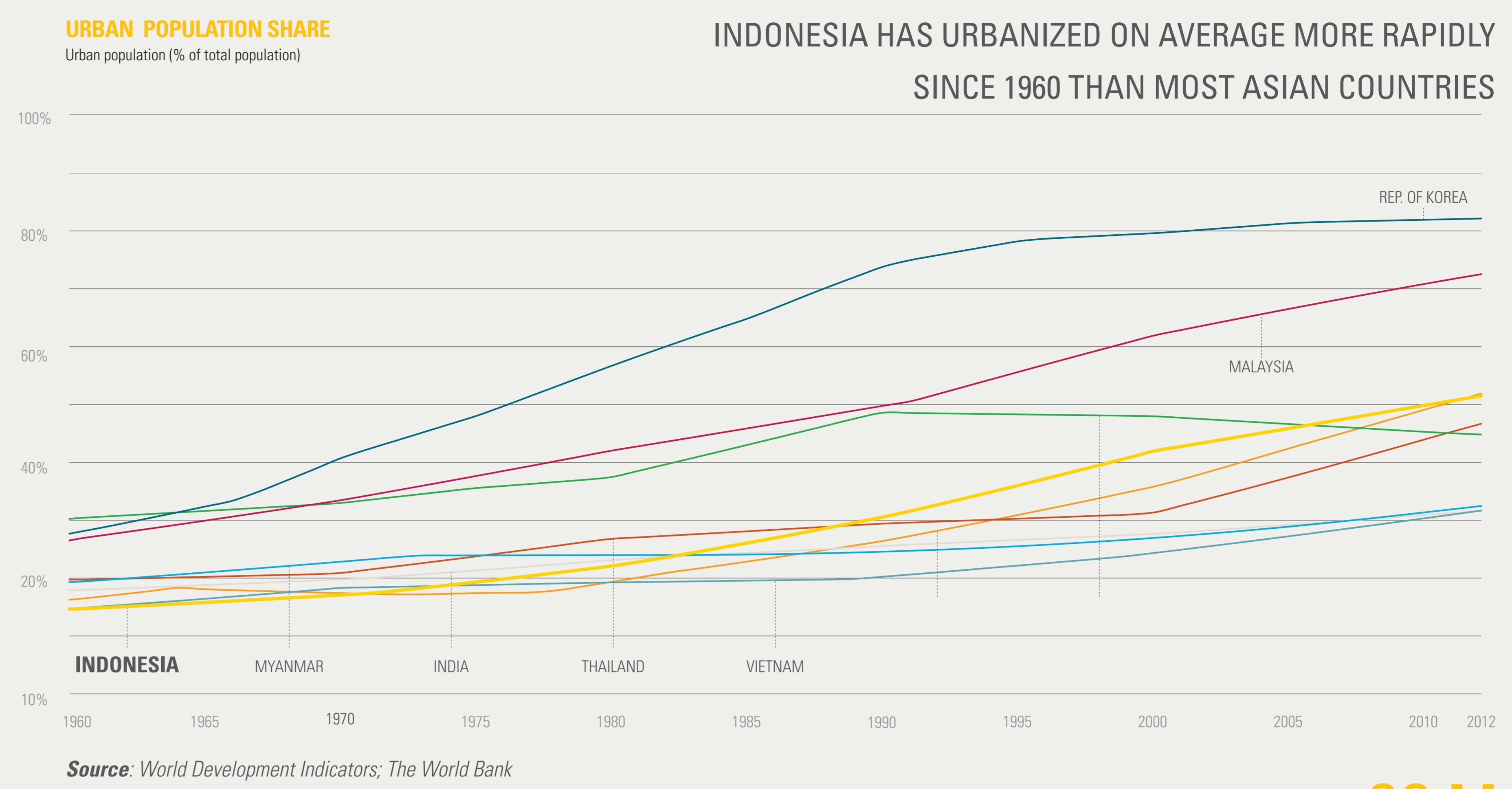
of the country's GDP

INDONESIA AND ITS MAJOR CITY JAKARTA, WILL BECOME INCREASINGLY SIGNIFICANT GLOBALLY

Indonesia's major urban area, Jakarta, which makes up a 11% share of the country's population, figures prominently internationally, servicing a population on par with other megacities like Shanghai, Delhi and Tokyo. In fact, if Jakarta's current levels of growth continue, it is expected to overtake Tokyo and become the largest metropolis in the world by 2028.

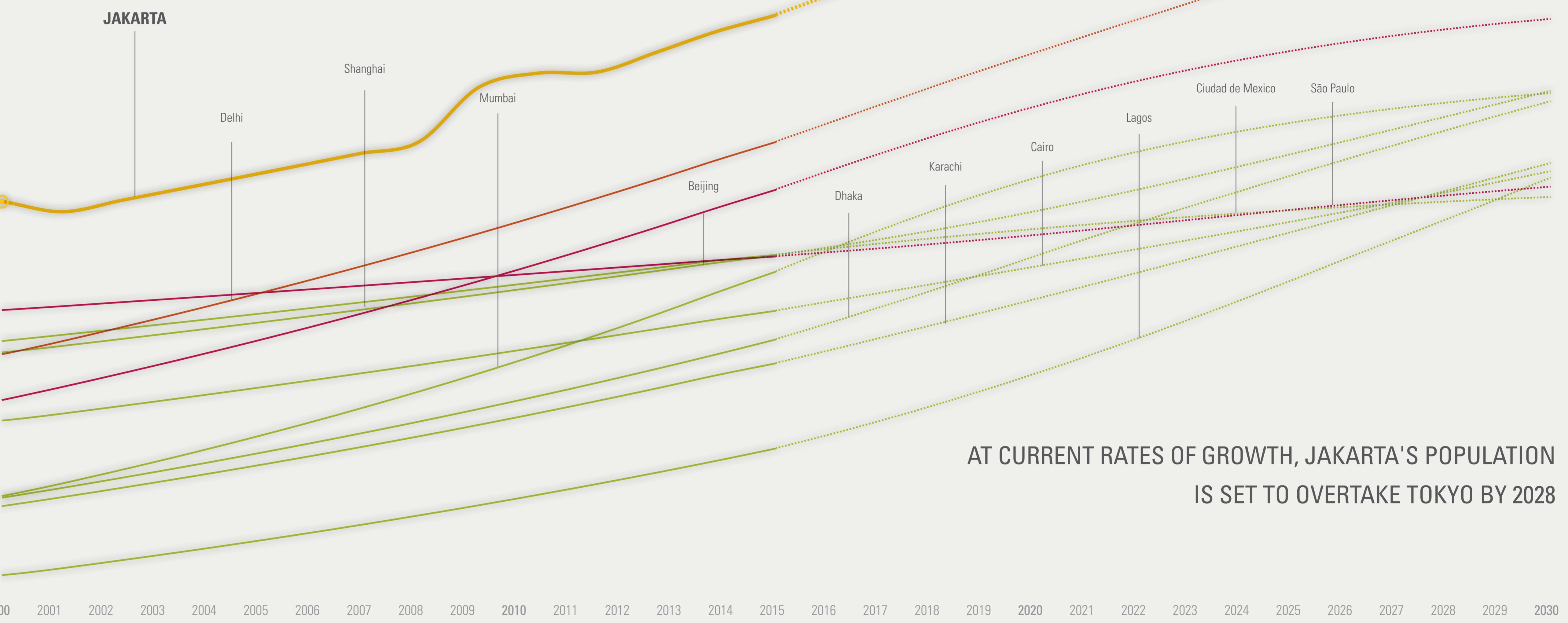
Other major cities operate as economic engines for their respective countries. As such, Jakarta will play a critical role in helping Indonesia achieve its stated target of a sustained 7% growth rate. However, Indonesia's current national development policies are framed with the intention of moving development away from Jakarta.

INDONESIA HAS URBANIZED ON AVERAGE MORE RAPIDLY SINCE 1960 THAN MOST ASIAN COUNTRIES



POPULATION IN THE LARGEST METROPOLITAN AREAS
2000-2015, 2015-2030 projection
(in Millions of people)

23 M



Much of commerce in Indonesia is operated by small, informal vendors on streets. The photo below captured a chicken vendor outside kampung Keputren in Surabaya.

Banyak kegiatan jual beli di Indonesia dilakukan oleh pedagang kecil informal. Foto di bawah ini menunjukkan seorang pedagang ayam di luar Kampung Keputren di Surabaya

