



BUSINESS CLIMATE SURVEY FOR SWEDISH COMPANIES IN INDONESIA 2022

A REPORT FROM TEAM SWEDEN IN INDONESIA

KEY CONTRIBUTORS TO THIS REPORT

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FOREWORD

Sweden and Indonesia have a long and successful history of exchanging ideas, knowledge and technology in a long-term partnership for mutual growth. Last year, the Sweden-Indonesia Sustainability Partnership (SISP) was established to facilitate and drive more collaborations and projects to introduce and expand Swedish businesses in the market while also supporting Indonesia in its efforts to deliver on the Agenda 2030 and the SDGs.

With its population approaching 270 million, rising domestic demand and massive investments in physical and digital infrastructure, Indonesia is, without a doubt, a market with great potential for Swedish businesses. The first Swedish company in Indonesia was established more than a hundred years ago, and today almost 100 Swedish companies and brands are present in the market – operating in a wide range of industries such as energy, construction, consumer goods, transportation, and healthcare.

This report aims to learn from the experience of these companies and understand how they view the current business climate in Indonesia. We hope that the insights they share will be of great value to any Swedish company that is exploring the Indonesian business opportunity. We would like to extend our gratitude to the participating companies who have contributed to this report and look forward to continuing our collaboration going forward.



Marina Berg
Ambassador of
Sweden to Indonesia



Erik Odar
Trade Commissioner of
Sweden to Indonesia

EXECUTIVE SUMMARY



REPORT COVERAGE

40% was the participation rate of Swedish companies in the survey, out of the 48 present companies invited

60% of the participants are from large corporations, with more than 1,000 employees globally



ECONOMIC OUTLOOK

58% of the respondents confirmed to be profitable in 2021, slightly higher compared to last year's result

53% of the Swedish companies expect to increase or maintain their investments for the coming 12 months



THE MARKET

39% of respondents perceive the business climate in Indonesia as very good or good

Swedish Companies evaluated personal safety, service providers, and distributors as top three conditions met for the need of their companies' operation in Indonesia



KEY SUCCESS FACTOR

Customer feedback, brand awareness, and sales competence identified as top three key success factors in Indonesia

58% of Swedish companies believe Swedish brand contribute greatly to their businesses.



SUSTAINABILITY

42% of the respondents believe sustainability influences the purchasing decision partially/significantly

58% of the participants respond do not know or not applicable to being exposed to corruption

ABOUT THE SURVEY

Business Climate Survey Indonesia 2022

Team Sweden, consisting of Business Sweden and the Swedish Embassy in Jakarta, has conducted this 5th edition of the Business Climate Survey with Swedish companies in Indonesia. The Business Climate Survey is a tool developed by Team Sweden to acquire first-hand insights from present Swedish companies to review business trends, issues, and challenges in respective market.

This survey was carried out in March – April 2022 and distributed to 48 Swedish companies present in the market; a total of 19 respondents and a response rate of 40% was achieved. To ensure valuable and reliable insights, the surveys were sent to company representatives at the level of Country or Regional Managers or other executives with similar roles. This report portrays the views from these Swedish companies as well as analysis and information based on Team Sweden findings.

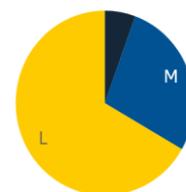
This year's survey participants are dominated by large companies with more than 60 per cent of responses from this type of company. 28 per cent of the responses are from medium-sized companies, and small companies contribute six per cent. Almost half of the respondents are from the industrial sector, 37 per cent from the professional services sector, and 11 per cent from the consumer product sector.

Representatives from mature companies, classified as companies established in Indonesia before 2001, constitute the largest chunk of respondents in the 2022 survey. About 59 per cent of the participants are mature companies with more than twenty years of experience in Indonesia, 35 per cent of the respondents are companies deemed experienced, and only six per cent of respondents are considered newcomers.

This report is structured into five sections to present the result of the survey and additional analysis and findings. The first section presents Swedish companies' views about the economic outlook and business performance. The second section takes us to understand the respondents' perception of the business climate as well as the market conditions that contribute to doing business in Indonesia. The third section sheds a light on Swedish companies' operations and perceived success factors. The fourth section explores sustainability-related aspects of business in Indonesia and how these factors impact companies' operations. Finally, we represent Sweden-Indonesia Sustainability Partnership (SISP) as the platform Team Sweden proudly establish to support the success of Swedish companies in Indonesia.

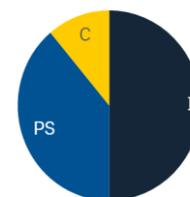
The survey questions and response interval have been synchronised with Business Climate Surveys carried out in other markets worldwide to enable comparison where relevant.

SIZE OF COMPANIES



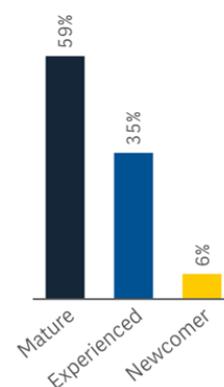
NOTE: Global employees. Large >1000. Medium 250-1000. Small 0-249.

MAIN INDUSTRY



NOTE: 47% Industrial. 37% Professional services. 11% Consumer.

AGE OF COMPANIES



NOTE: Mature (<2000). Experienced (2001-2015). Newcomer (2016-)



ECONOMIC OUTLOOK

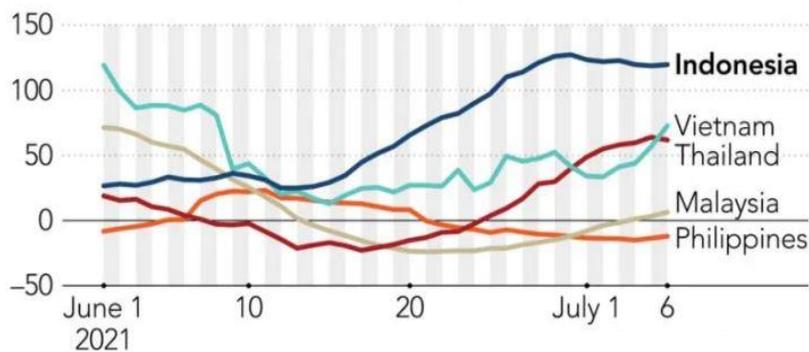
The overall economy is improving thanks to pandemic control measures

The year 2021 was not an easy year for a lot of countries, including Indonesia. The ongoing pandemic has had a substantial impact on various areas, especially on the economy. After successfully pulling out of recession in Q-2 2021, the country was again disrupted by Covid-19's Delta variant outbreak.

At the end of 2021, the situation has started to look up thanks to an aggressive mass vaccination program and successful pandemic control measures. The national vaccination program could be accelerated, despite the vast population of Indonesia, as a result of joint efforts of all elements in the nation including ministries, national defence forces (TNI), national police, businesses, and social and religious organizations.

In May 2022, President Joko Widodo announced that people were allowed to take off their masks in open places with no crowds. However, people were still required to wear face masks during closed room activities and public transport rides. Health Minister Budi Gunadi Sadikin said the reason for easing the mask mandate in open spaces is part of the transition program from pandemic to endemic. The Government will assess the situation of the transition state in the next six months.

Indonesia's COVID-19 cases surging faster than ASEAN peers *(Percentage change in number of confirmed cases over 14 days compared with the previous 14 days)*



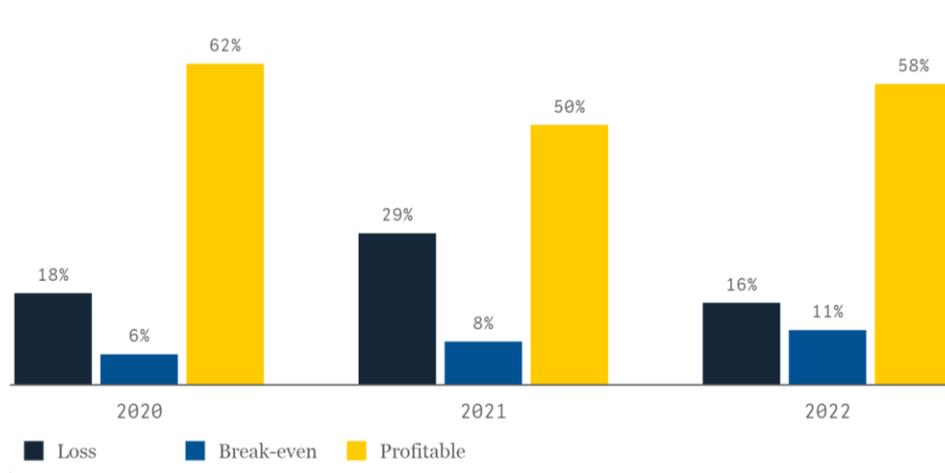
SOURCE: Nikkei Asia, WHO, Our World in Data

More than half of the respondents reported a profitable year in Indonesia

Similar to the recovering economic situation, it appears that many of the respondents have successfully dealt with and navigated the pandemic's effect. Fifty-eight per cent of the respondents in Business Climate Survey 2022 have confirmed profitability in 2021, slightly higher compared to last year's result of 50 per cent.

Looking closer at the type of industry renders a more nuanced picture. More companies from industrial and consumer reported profitability than professional services. Around 67% of industrial companies and 50% of consumer companies reported profitability, while only 43 per cent of professional services companies reported profits in 2021.

HOW WOULD YOU DESCRIBE YOUR COMPANY'S FINANCIAL PERFORMANCE IN INDONESIA IN 2021?



► **58% of the respondents reported to be profitable in 2021**

NOTE: The number of respondents for this question was 19. "Don't know/ Not applicable" responses are included but not shown in figure.

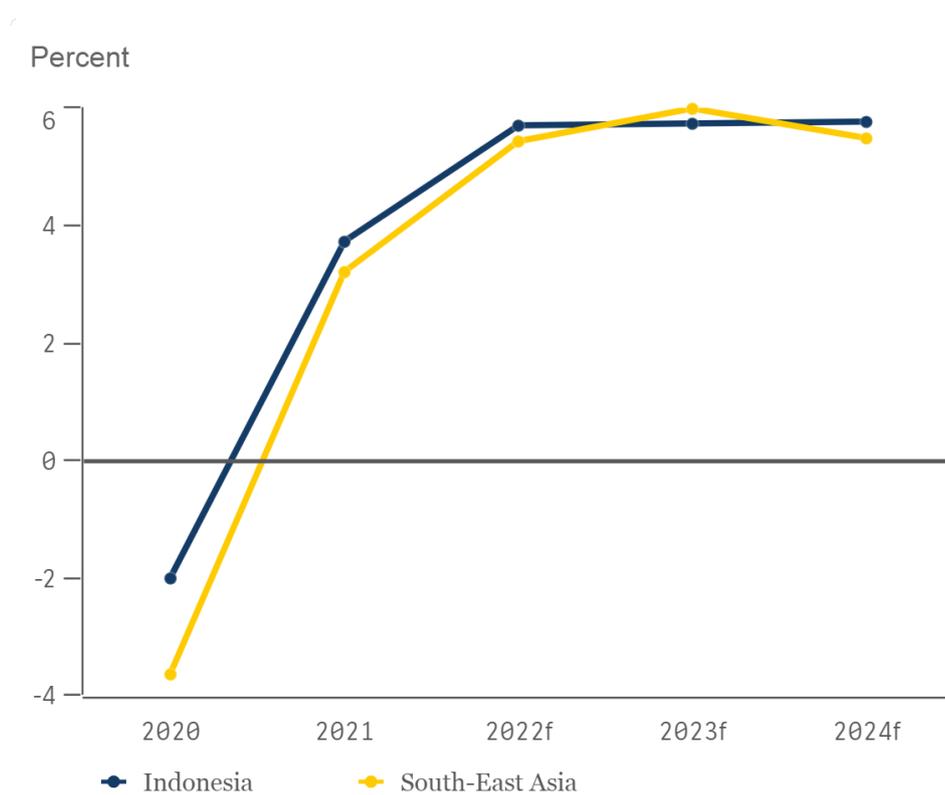
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Slow but steady economic recovery to be expected in the coming years

Compared to the Southeast Asia region, Indonesia has shown better performance in terms of economic growth during 2020-2021. Despite having recorded positive growth in 2020-2021, the outlook for Indonesia's economy in 2022 is clouded by rising COVID-19 cases, potential financial market volatility due to a global monetary tightening and Indonesia's own rollback of monetary and fiscal stimulus.

A study by The World Bank forecasts slower growth in the Southeast Asia region this year due to three interrelated shocks: monetary tightening in the United States that could lead to inflation; slowing growth in China; and the aftershocks of the war in Ukraine. While the region's direct dependence on Russia and Ukraine for trade is limited, the war and sanctions are likely to increase international prices of food and fuel, thus furthermore dampening growth.

PROJECTED GDP GROWTH IN INDONESIA



SOURCE: Oxford Economics, GDP, real, annual growth. Last update: 25 April 2022.

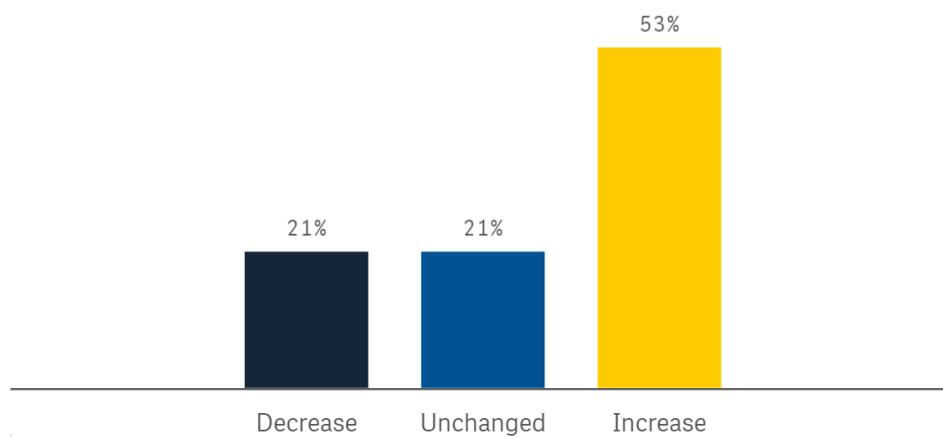
Swedish companies expect increasing turnover in the coming year

Similar to the optimistic forecast of the Indonesian economy, more than half of the respondents believe in the increase in company turnover for the coming 12 months. Out of companies responding, all small companies expect a slight decrease in their turnover. Larger companies show more optimism, with 58% of large companies and 40% of medium size companies believing in turnover increase.

Zooming in to the type of industry, only industrial and professional services expect an increase in turnover. Consumer companies are split, with half expecting a decrease in turnover and half expecting that turnover remains unchanged.

Like the Swedish companies in our survey, owners of local small and medium-sized enterprises in Indonesia are optimistic about future economic and business growth prospects according to research by Sun Life. While the business owners have optimistic views of the business prospect in the coming year, they are also aware of the risks which lead to taking measures for growth planning and building resilience.

COMPARED TO THE DEVELOPMENT IN THE PAST 12 MONTHS, WHAT ARE YOUR EXPECTATIONS FOR THE COMING 12 MONTHS FOR YOUR INDUSTRY IN INDONESIA REGARDING TURNOVER?



► **More than half of the respondents are expecting an increase in turnover for the coming 12 months**

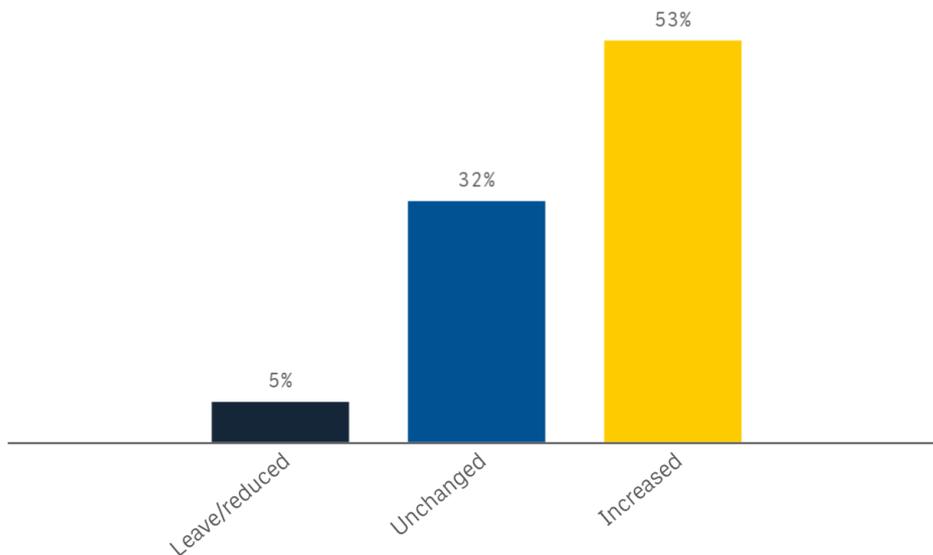
NOTE: Decrease and increase represent aggregations of slight/ significant development changes. The number of respondents for this questions was 19. "Don't know/ Not applicable" responses are included but not shown in figure.
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Swedish companies are looking forward to increase or maintain their investments in the country

More than half of the participants anticipate that they will slightly or significantly increase their investments in the next year. All small companies participating in the survey reported a plan to increase their investment, indicating their plan to strengthen their footprint to match larger companies that are more settled. Thirty-two per cent of respondents plan to keep their investment plan at the status quo, while only five per cent plan to leave the market or reduce their investment level slightly to significantly. Overall, this result indicates that the majority of the respondents have good faith in the Indonesian economy and wish to grow their businesses further.

WHAT ARE YOUR COMPANY'S INVESTMENT PLANS FOR THE COMING 12 MONTHS IN INDONESIA, COMPARED TO THE PAST 12 MONTHS?

INVESTMENTS WILL BE...



NOTE: Reduced and increased represent aggregation of slight/ significant development changes. The number of respondents for this question was 19. "Don't know/ Not applicable" responses are included but not shown in figure.
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.



THE RITZ-CARLTON

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BIKIN
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THE MARKET

Swedish companies operations in Indonesia

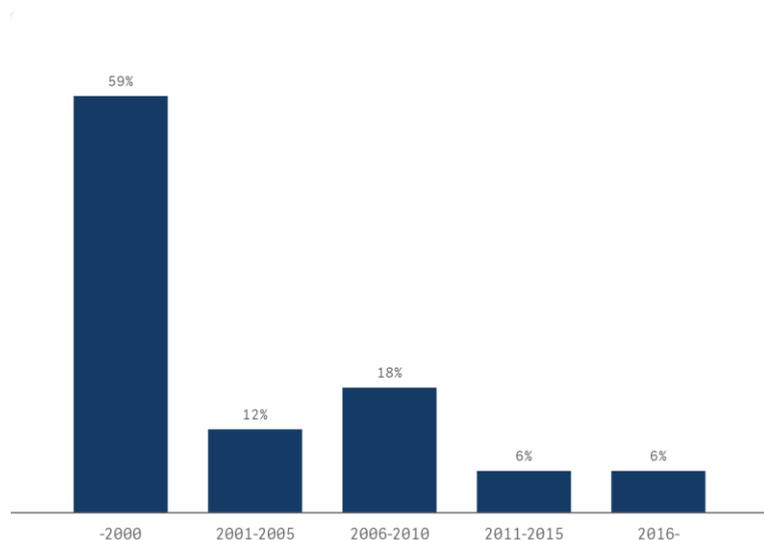
For the past few years under the administration of Joko Widodo, Indonesia has made infrastructure development a top priority. The vision for infrastructure development is noted down in the National Long-Term Development Plan 2005-2025, which envisioned how the country would increase its investments in infrastructure, human capital, and science and technology, as well as improve exports and develop Indonesia's competitive advantages.

In addition to strengthening the physical infrastructure, the government is also putting in the effort to create an investor-friendly government with minimum regulatory processes for doing business in Indonesia. In October 2020, the Indonesian government passed the Omnibus Bill on Job Creation. Under the Omnibus Law, the issuance of business licenses for newcomer companies is determined by a risk-based approach. The number of licenses and permits required for each business will be based on the business risk level determined by the scale of the hazards that the business has the potential to create and the risks posed by the business activities. The Omnibus Law also simplifies business licensing by eliminating the need for business actors to obtain a location permit. Instead of obtaining a location permit, business actors will only have to ensure that their business location conforms to the relevant Detailed Spatial Plan.

At the same time, the Government also has the vision to strengthen the structure of the domestic industry and reduce dependence on imported products. The Ministry of Industry encourages the optimization of the local content level (TKDN) in the procurement of goods and services. According to the 2018 Industry and Government Regulation (PP) Number 29 which concerns Industrial Empowerment, the use of domestic products must be supported by various government agencies, such as ministries and institutions, local governments, BUMN and BUMD that procure goods and services through APBN, APBD or grant financing. Various industries are affected by this local content requirement, including but not limited to healthcare, automotive, and oil and gas. It is important for Swedish Companies to stay up to date on the local content regulation and take action accordingly so that it will not hinder their operation in Indonesia.

With regard to Swedish companies participating in the survey, more than half of the respondents have been established in Indonesia for over two decades or are classified as mature. Thirty-six per cent of the companies constitute experienced (established between 2001 and 2015), and only 6 per cent are newcomers (established after 2015).

IN WHAT YEAR DID YOUR COMPANY ESTABLISH OPERATIONS IN INDONESIA?

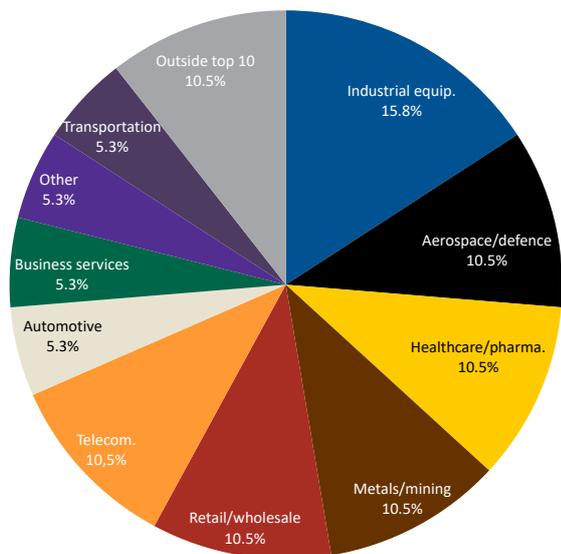


NOTE: The number of respondents for this question was 19. "Don't know/Not applicable" responses are included but not shown in figure.

SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Swedish companies in Indonesia are active in a wide range of industries. As the manufacturing sector contributes to approximately 20 per cent of Indonesia's GDP, it is intuitive that industrial equipment ranks as the first of the main sectors for Swedish companies in the country, with aerospace/ defence, healthcare and pharmaceuticals, metals and mining following behind.

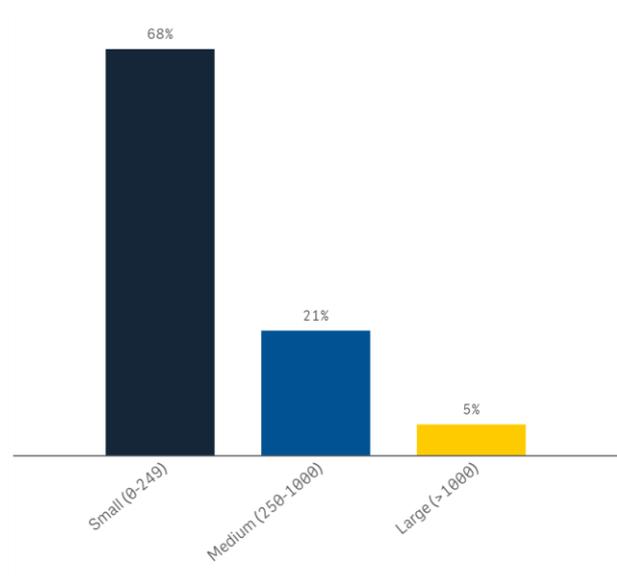
WHAT IS YOUR COMPANY'S MAIN INDUSTRY IN INDONESIA?



NOTE: The number of respondents for this question was 19. "Don't know/Not applicable" responses are included but not shown in figure.
 SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

The participating Swedish companies in this survey primarily consisted of small-sized companies with less than 250 local employees. Only 21 per cent of the respondents are from medium-sized companies, and the remaining five per cent are from large companies.

SWEDISH FIRMS' LOCAL NUMBER OF EMPLOYEES IN INDONESIA IN 2022

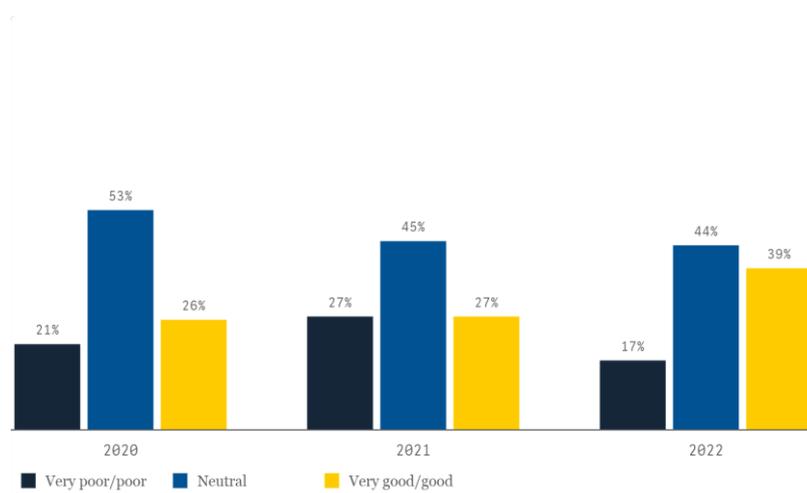


NOTE: The number of respondents for this question was 19. "Don't know/Not applicable" responses are included but not shown in figure.
 SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022

As the pandemic situation is more controlled, Swedish companies assess the business climate in Indonesia to be very good and/ or good

Last year, Swedish companies' perceptions of the business climate in Indonesia were quite unsatisfactory as Covid-19 had disrupted all business sectors. This year, more companies are optimistic, with 39 per cent of the respondents perceiving a very good and/ or good business climate and only 17 per cent having a very poor and/ or poor perception. Despite the pandemic and other challenges in the country, Indonesia will continue to attract foreign investors. Indonesia is a high potential market for European companies and is already a major trade and investment destination for the EU in Southeast Asia.

HOW DO YOU PERCEIVE THE CURRENT BUSINESS CLIMATE IN INDONESIA?



▶ **39% of respondents perceive the business climate in Indonesia as very good and/or good**

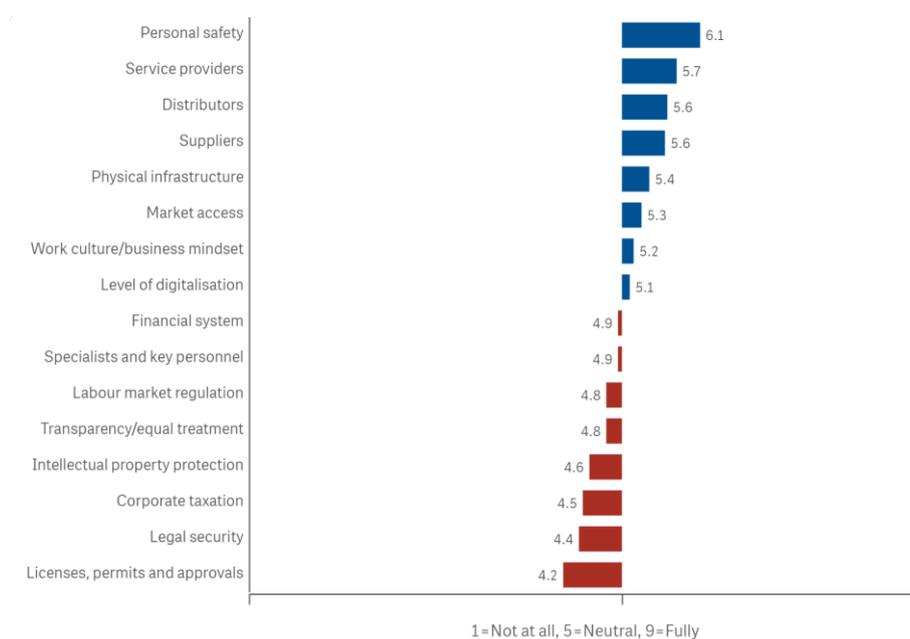
NOTE: The number of respondents for this question was 19. "Don't know/ Not applicable" responses are included but not shown in figure.

SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Business conditions in Indonesia overall satisfactory but can be improved

When evaluating the business conditions in Indonesia, Swedish companies noted personal safety, service providers, and distributors as the top three conditions that met the needs of their companies' operations. Another important parameter that was considered to meet their needs is physical infrastructure. This observation is expected given that the current Government has been focusing on developing infrastructure, such as toll roads, urban transportation systems, and more across the nation.

PLEASE RATE FROM 1-9 HOW THE BELOW CONDITIONS MEET THE NEEDS OF YOUR COMPANY'S BUSINESS IN INDONESIA



NOTE: The number of respondents for this question was 19. "Don't know/ Not applicable" responses are included but not shown in figure.

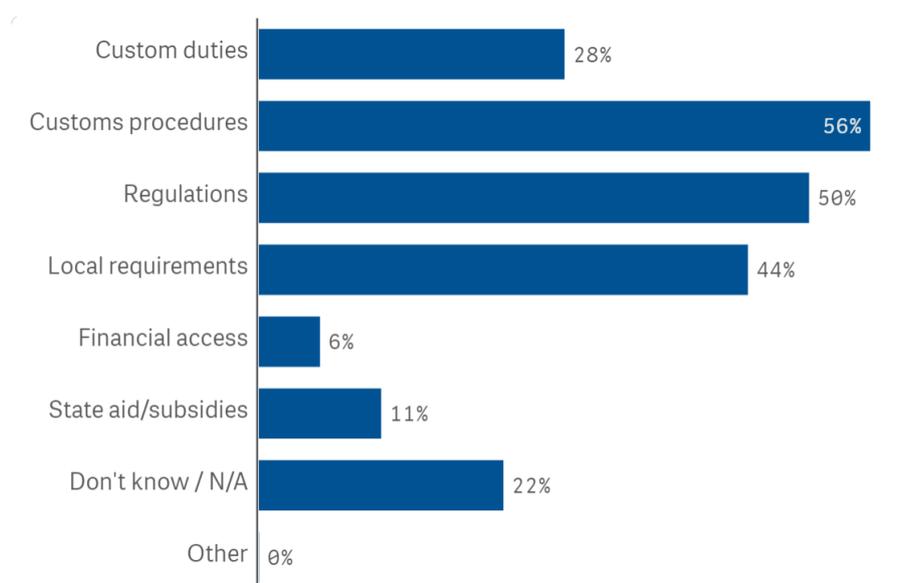
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Trade barriers remain one of the hurdles when doing business in Indonesia

Delays, unusually high fees, and excessive documentation are just some examples of the difficulties that businesses in Indonesia face as they conduct international trade. When we asked if the respondents have ever encountered any trade barriers in Indonesia 22 per cent of them reported having done so.

When probed further, the respondents elaborated that an increasing trend of non-tariff barrier implementation has influenced their businesses. Non-tariff measures include a variety of regulations on imports and exports such as technical requirements, rules of origin, or quotas. There is a need for a discussion among regulators, private sectors, associations, and academics to discuss how to solve this problem so it won't dampen the economy.

HAS YOUR COMPANY IN THE PAST YEAR ENCOUNTERED TRADE BARRIERS IN INDONESIA WITH A NOTICEABLY NEGATIVE IMPACT ON OPERATIONS, IN ANY OF THE FOLLOWING AREAS?



NOTE: The number of respondents for this question was 19.
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.



Nowadays, it is more difficult to sell without having an assembly on-site in the country. We understand this policy is meant to create more jobs in the country.

General Manager,
Swedish Healthcare
Company



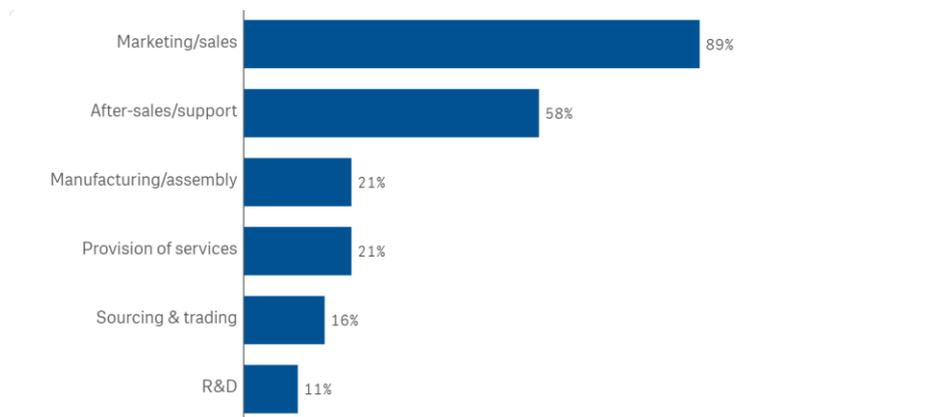
HOW SWEDISH COMPANIES SUCCEED IN INDONESIA

Majority of the Swedish companies focus on marketing and/ or sales activities

The main operational focus for Swedish companies established in Indonesia is marketing and/ or sales – 89 per cent, followed by after-sales and/ or support – 58 per cent. For some sectors, such as food and beverage or consumer goods, there are several large regional markets that could lead to differences in tastes and preferences. Therefore, a one-size-fits-all marketing strategy will simply not work in the country.

Despite manufacturing being one of the key contributors to Indonesia's GDP, only 21 per cent of the respondents carry out manufacturing and/ or assembly. This could be due to the amount of investment required as well as the minimum local content requirement set by The Government of Indonesia.

WHAT OPERATIONS DO YOU CARRY OUT IN INDONESIA?



NOTE: The number of respondents for this question was 19. "Don't know/ Not applicable" responses are included but not shown in figure.

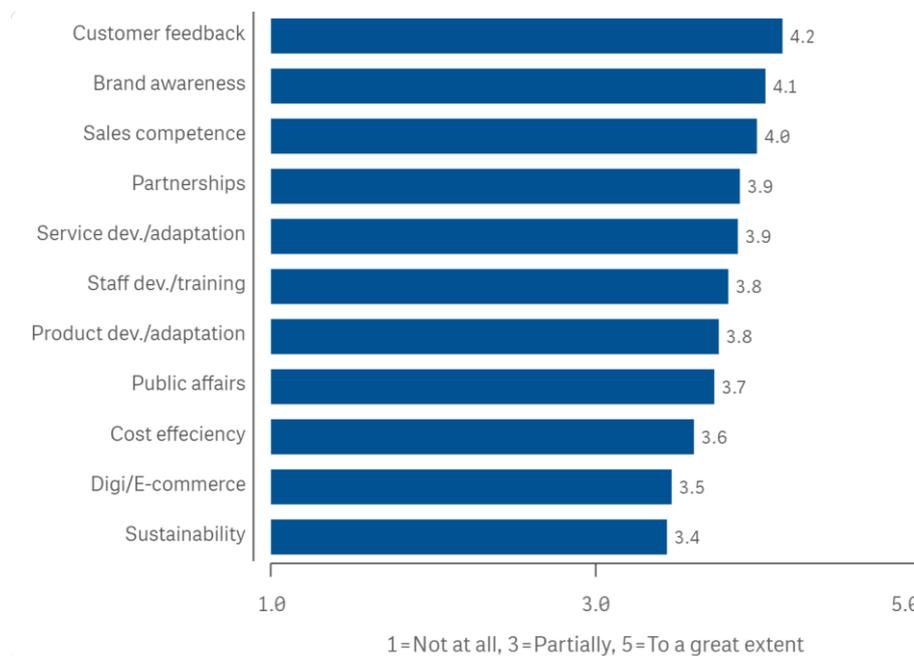
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Customer feedback, brand awareness and sales competence identified as key success factors in Indonesia

The survey identifies ten areas that contribute to the competitiveness of Swedish companies in Indonesia. In last year's survey, respondents selected *cost efficiency*, *brand awareness*, and *partnerships* as the top three areas critical to maintaining competitiveness in Indonesia. However, this year the respondents have identified *customer feedback*, *brand awareness* and *sales competence* as the key success factors in Indonesia.

Given that strong relationships are important to doing business in Indonesia, it makes sense that companies listen to the feedback from their customers and ensure their product/ service fits the request of the customers.

TO DATE, WHICH OF THE FOLLOWING AREAS HAVE BEEN IMPORTANT IN MAINTAINING COMPETITIVENESS IN INDONESIA?



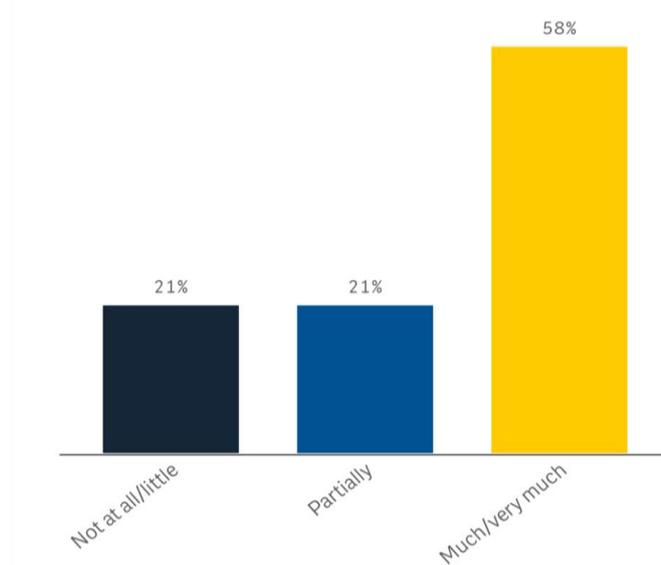
NOTE: The number of respondents for this question was 19.
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Sweden's reputational benefits positively for Swedish companies

Sweden's brand image as a country with innovative, high-quality, and sustainable products and services is believed to contribute to Swedish companies' businesses in Indonesia; 58 per cent believe the brand image significantly contributes, and 21 per cent believe it contributes partially.

The positive impression of Sweden is echoed internationally: according to the Good Country Index (recently shared by the Swedish Institute), Sweden is ranked first, taking into account categories such as health and wellbeing, prosperity and equality and the planet and climate.

TO WHAT EXTENT WOULD YOU ESTIMATE THAT THE "SWEDISH BRAND" CONTRIBUTES TO YOUR BUSINESS IN INDONESIA?



NOTE: The number of respondents for this question was 19. "Don't know/ Not applicable" responses are included but not shown in figure.

SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.



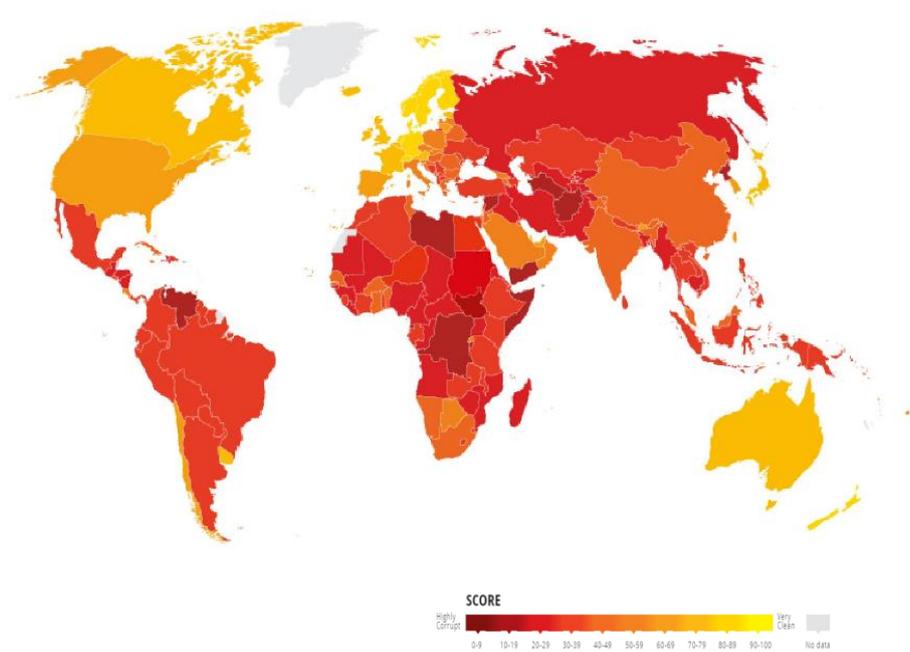
ACTING SUSTAINABLY

While there is progress over the years, corruption persists

Ever since the fall of the authoritarian regime in 1998, Indonesia has made progress in democracy, such as the establishment of many political parties and increased freedom for media. However, the country continues to struggle with a specific challenge from the new order period, corruption.

Corruption is a serious impediment to Indonesia's development. From an international trade perspective, corruption influences a company's decision to export to a country. Transparency International, an independent organization present in more than 100 countries, develops and releases Corruption Perception Index annually. This index scores 180 countries on the perceived levels of government corruption across a range of zero to 100, with zero indicating high levels of corruption and 100 indicating low levels. Indonesia's score in 2021 was 38, while the global average was 43.

CORRUPTION PERCEPTION INDEX 2021



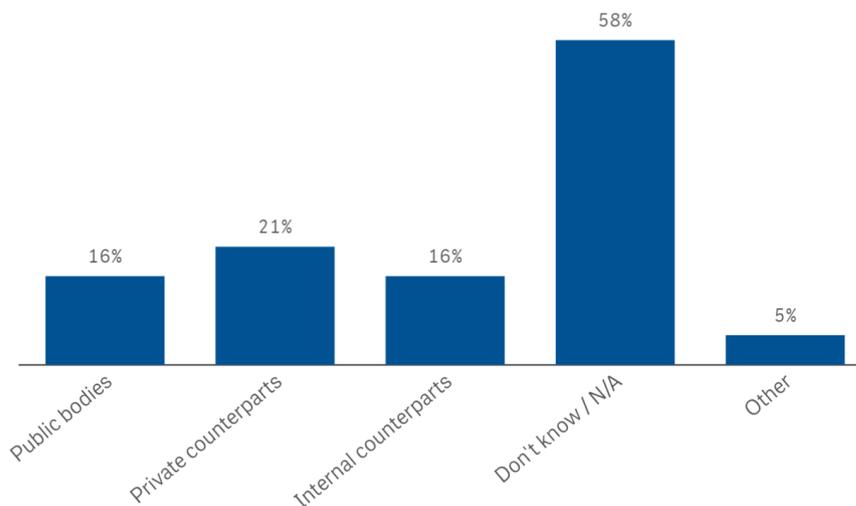
SOURCE: Transparency International.

There is an improvement in public bodies service

More than fifty per cent of our participants responded that they do not know if they had been exposed to corruption in the past year or that such exposure did not apply to them. The remainder answered yes, with a some being exposed to corruption in multiple set-ups, such as with public bodies and private counterparts. The encounter of corruption practices in the private sector is higher than the public sector, indicating that the reform action taken by The Government of Indonesia in public institutions is making a positive impact.

One of the major reforms for international businesses in Indonesia is Online Business Licensing Services, which simplifies the licensing process and makes it paperless. Furthermore, a significant portion of capital investment licensing is transferred from the Capital Investment Coordinating Board (BKPM) and other government agencies to the Online Single Submission (OSS) system, which for the time being is overseen by the Coordinating Ministry for Economic Affairs.

HAS YOUR COMPANY IN INDONESIA BEEN EXPOSED TO CORRUPTION SUCH AS, BUT NOT LIMITED TO, ATTEMPTS OF BRIBERY OR FRAUD IN CONTACTS WITH ANY OF THE FOLLOWING AREAS?



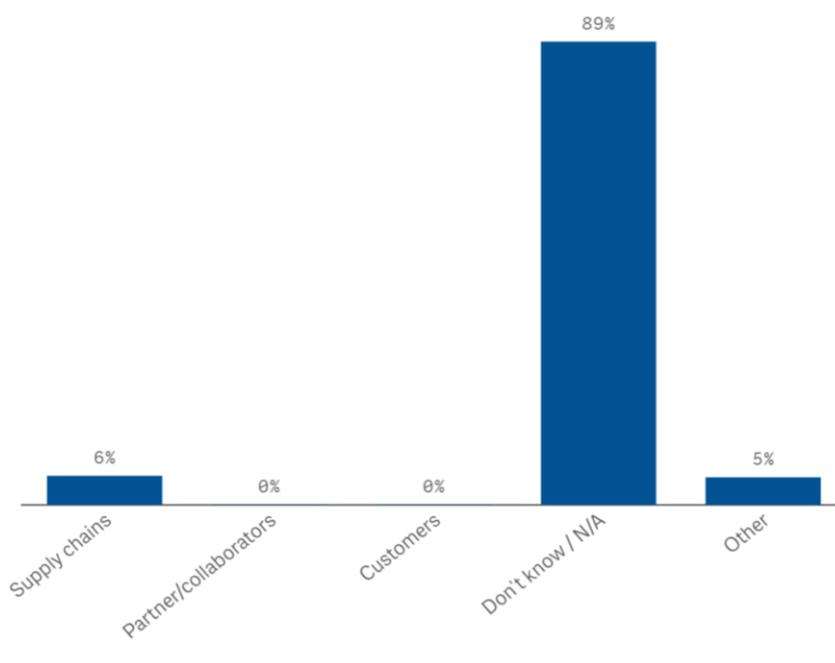
NOTE: The number of respondents for this question was 19.
SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.

Human rights violations are not perceived as much of a risk

There is no unilateral decision yet over the status of human rights implementation in Indonesia. As a country with thousands of islands and cultures, it is not surprising to see differences in human rights perceptions across the nation. For example, on Java island, where the capital city of Indonesia is located, people might perceive human rights implementation as acceptable given that it has the most advanced development. Whereas Papua, an area that has long sought independence, often speaks out about the prosecution of its local activists. Despite these differences, Indonesia has built several institutions that are directed to strengthen and guarantee the fulfilment of human rights - namely the National Commission on Human Rights (Komnas HAM), the National Commission on Violence Against Women (Komnas Perempuan), and the Indonesian Child Protection Commission (KPAI).

According to Amnesty Rights, some of the human rights violations in Indonesia in the past few years are related to indigenous people’s rights, freedom of expression, and workers’ rights. If we compared our findings from the survey, 89 per cent of the companies responded that they do not know if they had encountered any human rights violations in the past year or that such encounters did not apply to them. One theory that could explain this result is that the Swedish companies present have a good employment set-up which hinders the possibility of such violations occurring.

HAS YOUR COMPANY IN INDONESIA ENCOUNTERED ANY FORM OF HUMAN RIGHTS VIOLATIONS AND/ OR LABOUR RIGHTS ABUSE IN ANY OF THE FOLLOWING AREAS?



NOTE: The number of respondents for this question was 19. Don't know/ Not applicable" responses are included but not shown in figure.
 SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.



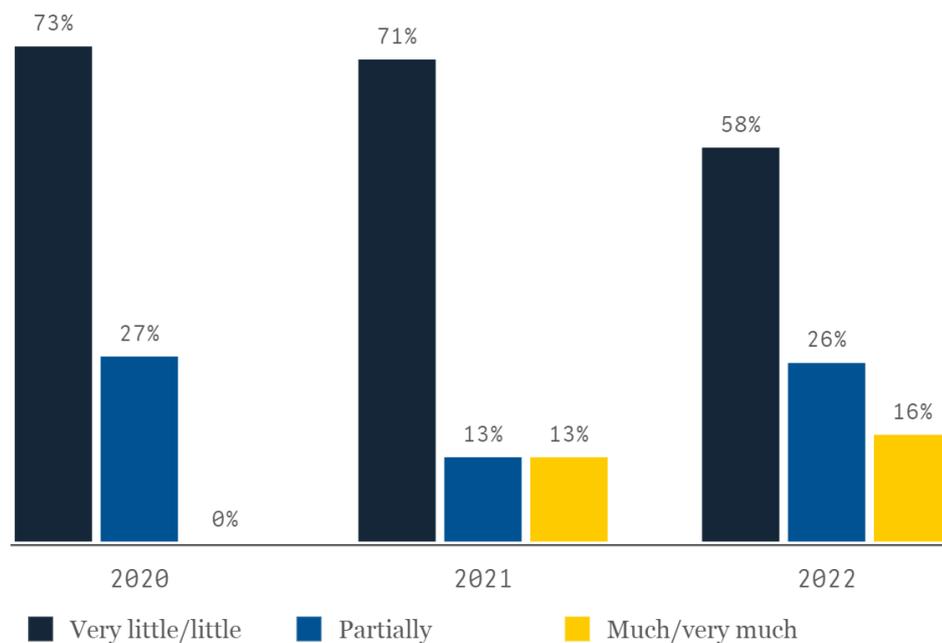
We ensure inclusion and diversity in leadership role as we support female empowerment.

Country Manager,
 Swedish Retail Company

Environmental aspects are slowly perceived to influence purchasing decision

Majority of the respondents from the survey this year still believe that their customers are limited in taking environmental aspects into account when making purchasing decisions. However, if we compare the results from this year's survey to previous years, we can observe that more companies see environmental aspects as more influential than ever. On the other hand, Swedish companies also see a need for a push from policymakers to ensure that sustainable and environmentally-friendly solutions are implemented. This is especially urgent since Indonesia has high population density and rapid industrialisation, which lead to environmental issues such as deforestation, air pollution, traffic congestion, garbage management, and reliable water and wastewater services.

IN YOUR VIEW, TO WHAT EXTENT DO CUSTOMERS IN YOUR INDUSTRY IN INDONESIA CONSIDER ENVIRONMENTAL ASPECTS OF A PRODUCT OR SERVICE IN THEIR PURCHASING DECISION?



NOTE: The number of respondents for this question was 19. Don't know/ Not applicable" responses are included but not shown in figure.
 SOURCE: Business Climate Survey for Swedish Companies in Indonesia 2022.



Policy making to attract private sectors to be part of Green Energy & Circularity initiative with innovative solution is required.

Country Manager,
 Swedish Manufacturing
 Company



SWEDEN-INDONESIA SUSTAINABILITY PARTNERSHIP

A platform to promote Swedish companies' solutions

Sweden and Indonesia enjoy a long and successful history of exchanging ideas, knowledge and technology in a long-term partnership aiming toward mutually beneficial growth.

In 2020, Team Sweden in Indonesia, with the support of the Indonesian Ministry for Foreign Affairs, launched the Sweden-Indonesia Sustainability Partnership (SISP). SISP is a platform to develop collaborations where Sweden and Indonesia work jointly to fulfil the SDG 2030 commitments in various fields. This year's SISP seeks to explore and establish collaboration through six activities and programs as below:

SISP Activities and Program



We look forward to continue the work to unleash the full potential of the Swedish–Indonesian partnership.

Team Sweden

