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## Indonesia Development Update

# A Year of Covid-19: A Long Road to Recovery and Acceleration of Indonesia's Development

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### Abstract

2020 is the year of Covid-19, Indonesia feels the enormity of this pandemic in various aspects of development. The Indonesian economy during the year slowed down to minus 5.3 percent in the second quarter of 2020 and in aggregate growth was minus 2.1 percent in 2020. The target of development planning in the National Medium Term Development Plan (*Rencana Pembangunan Jangka Menengah/RPJMN*) 2020-2024 was revised through the updating of the Government Work Plan (*Rencana Kerja Pemerintah/RKP*) in 2020, with the main priority of overcoming Covid-19. Then development began to be intensified in 2021 to pursue national priority targets that were abandoned due to Covid-19. The 2020 State Budget allocates around IDR 937.42 trillion for the prevention of Covid-19, including the accumulated APBD (Regional Revenue and Expenditure Budget) IDR 86.32 trillion, which makes the deficit financing for that year reach IDR 1,226.8 trillion. The Covid-19 pandemic control policy through Large-Scale Social Restrictions Policy (*Pembatasan Sosial Berskala Besar/PSBB*) has had ups and downs, especially when coupled with the new normal policy. The Policy for Enforcement of Restrictions on Community Activities (*Pemberlakuan Pembatasan Kegiatan Masyarakat/PPKM*) as a substitute for PSBB was implemented in early February and the parallel national vaccination program is expected to support accelerated development as outlined in the RKP 2021. In 2021, the Covid-19 pandemic is still high in the world, and the acceleration of development proclaimed by the government gets a stretch of road that extends to be traversed.

**Keywords:** Covid-19, RKP 2021, RPJMN 2020-2024, development planning

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# Indonesia Development Update

## A Year of Covid-19: A Long Road to Recovery and Acceleration of Indonesia's Development

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### I. Introduction

Covid-19 destroyed the joints of the world economy in 2020, and it seems that it will still be high in 2021. Worldometer, as of April 22, 2021 released data that the daily cases of positive Covid-19 reached more than 892 thousand people, the cumulative number no less than 145 million people worldwide are infected, and more than 3 million of them died (Figure 1).

This pandemic has become a significant threat to human physical and mental health and dramatically affects everyday life with psychosocial implications on a global scale. The impact of the SARS-CoV-2 pandemic on public health is truly beyond everyone's imagination. The pandemic has hit more than 210 countries, and most of these countries are still under multiple infection control measures, including lockdowns, quarantine, mandatory use of masks, and public distancing. (Wang C. et al., 2021).

The Covid-19 pandemic has brought the world to the brink of the worst economic recession in the last 50 years of world economic history. In 2020 the world economy will grow by minus 3.5 percent, as quoted by the International Monetary Fund (IMF) through its publication "The World Economic Outlook" (2021), where this figure is worse than the global financial crisis in 2009 and the Asian monetary crisis in 1998.

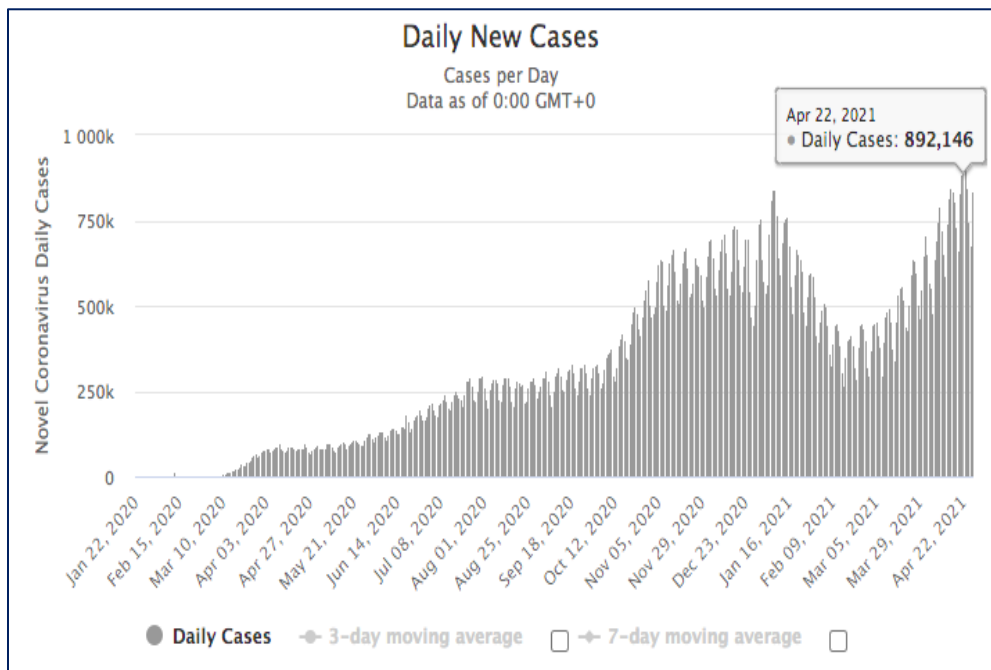


Figure 1. World Daily New Cases

Source:: Worldometer, 2021

Meanwhile, Indonesia is one of the countries that continue to struggle against Covid-19 with various policies that combine countermeasures without sacrificing the economy. As data from the Government of Indonesia through the Committee for Handling Covid-19 and National Economic Recovery (KPCPEN), as of April 22, 2021, show the number of daily cases has increased to 6,243 people, cumulatively the number of positive cases has reached more than 1.6 million, and more than 44 thousand of them died.

The Indonesian economy itself in 2020 is no less gloomy than what is happening in the world. After the economy grew positively in the first quarter of 2020 by 3 percent, economic growth fell in freefall in the next 3 consecutive quarters of minus 5.3 percent, minus 3.5 percent, and minus 2.2 percent. Cumulatively in 2020, Indonesia will grow at minus 2.1 percent (BPS, 2021). Something to be very grateful for, considering that in 1998, Indonesia's economy fell by minus 13.3 percent.

On the financial side of the country, this condition also makes the APBN map change completely. In June 2020, through the Minister of Finance Sri Mulyani, the government cut Ministries and Institutions' budgets and then reallocated around IDR 695.2 trillion for Covid-19<sup>3</sup>. Later, the BPK audit at the end of 2020 released a figure that the government had allocated IDR 1,035 trillion for Covid-19. The funds come from the APBN, amounting to IDR 937.42 trillion, and funds from the regional revenue and expenditure budget (APBD) amounting to IDR 86.36 trillion. Then from the monetary sector IDR Rp. 6.50 trillion<sup>4</sup>. According to the release of the Ministry of Finance, the realization of debt financing reached IDR 1,226.8 trillion during 2020. The new debt increased more than three times or grew 180.4 percent from the realization of debt financing in 2019, which only reached IDR 437.5 trillion. The withdrawal of the new debt is also much higher than the target in the 2020 State Budget of IDR 351.9 trillion. However, it is still within the range projected in Presidential Decree 72/2020, which is IDR 1,220.5 trillion.<sup>5</sup>

The consequences of this situation forced the government to revise all development targets in 2020 and cut the State Budget in 2020 considerably to be relocated to the Covid-19 pandemic countermeasures. The government was forced to revise the targets set in the National Mid-Term Development Plan (*Rencana Pembangunan Jangka Menengah/RPJMN*) 2020-2024 and the Government Work Plan (*Rencana Kerja Pemerintah/RKP*) 2020 to be transferred and planned to encourage their achievement in 2021 and thereafter.

This article will examine several things related to how Indonesia's development would be in 2020 when Covid-19 hits. This article also reviews various policies taken by the government when the government considers the balance of priorities between tackling Covid-19 and saving the economy. The government has implemented several policies to deal with Covid-19 which are relatively moderate through the Large-Scale Social Restrictions Policy (*Pembatasan Sosial Berskala Besar/PSBB*) and The Policy for Enforcement of Restrictions on Community Activities (*Pemberlakuan Pembatasan Kegiatan Masyarakat/PPKM*), then aggressive through the vaccination program, which are very loose through the declaration of a new normal. This article will also examine various national priority programs in the RKP 2021, where the prevention of Covid-19 is prioritized in the short term. In the medium term, the government will continue the pending programs in the first year of RPJMN 2020-2024 and accelerate the achievement of the targets that have been set.

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<sup>3</sup> Tempo, <https://bisnis.tempo.co/read/1354261/sri-mulyani-anggaran-covid-19-naik-jadi-rp-6952-triliun>.

<sup>4</sup> CNBC Indonesia, <https://www.cnbcindonesia.com/news/20201230095755-4-212468/bpk-anggaran-penanganan-covid-19-ri-tembus-rp-1000-t>.

<sup>5</sup> CNBC Indonesia, <https://www.cnbcindonesia.com/news/20210107090409-4-214064/buka-bukaan-sri-mulyani-soal-apbn-2020-hingga-dampak-covid-19/2>.

## II. Indonesia in One Year with Covid-19

Panji Hadisoemarto<sup>6</sup> in the May 30, 2020 edition of Tempo Magazine, when Covid-19 again warmly spread throughout the world, once stated that the world community would live with Covid, or in straightforward terms, live under the threat of Covid-19 at any time (Muhyiddin, 2020).

Like other developing countries, Indonesia is very vulnerable to the Covid-19 pandemic (Barbier et al., 2020). This is partly due to international support in every development problem as mandated in the 17 Sustainable Development Goals (SDGs). When Covid-19 hit, donor countries were busy with their respective internal affairs, considering that this pandemic is also very difficult to contain. A large country like the United States is also very overwhelmed, so that positive cases and deaths due to being infected with Covid-19 are among the highest in the world.

About 13 months after discovering the first Covid-19 case in Indonesia, the curve of infection cases, although fluctuating, continues to rise. As stated in the introduction of this article, the Covid-19 case continues to grow along with policies that are out of sync between overcoming Covid-19, saving the economy, and policies that will have a big day affecting population mobility political agendas that hit many basics. Health protocols that all parties must adhere to.

In Figure 2, it can be seen that several crucial points for the increase in cases occurred precisely due to the un-synchronization of government policies themselves. The drastic increase in the first daily cases occurred after Idul Fitri (Eid Mubarak, an Islamic religious holidays), around the middle of May 2020, where the daily cases were below 300 cases immediately doubled to around 600 cases.<sup>7</sup> Then in mid-June 2020, there were around 1,000 daily cases. This accumulation due to the holidays (along with the controversy about going home and returning to their hometowns<sup>8</sup>) as well as the declaration of a new normal era by the government<sup>9</sup>.

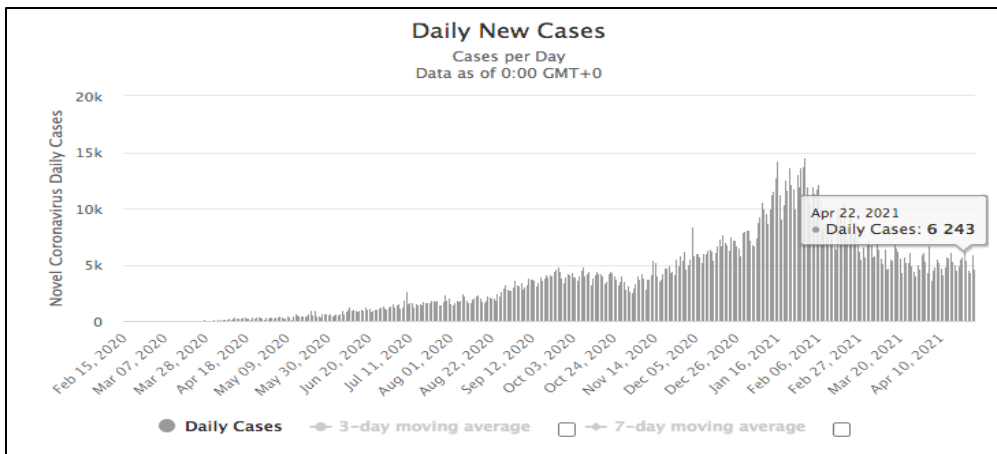


Figure 2. Indonesia Daily New Cases

<sup>6</sup> Tempo, <https://majalah.tempo.co/read/kolom/160591/kolom-statistik-rt-dan-penggunaannya-dalam-kebijakan-publik-tentang-normal-baru?>

<sup>7</sup> Kompas, <https://megapolitan.kompas.com/read/2020/12/28/12001581/ketika-angka-covid-19-selalu-naik-pasca-libur-panjang?page=all>.

<sup>8</sup> Kontan, <https://nasional.kontan.co.id/news/ini-perbedaan-mudik-dan-pulang-kampung-menurut-presiden-jokowi>.

<sup>9</sup> Republika, <https://republika.co.id/berita/qbwe8r396/new-normal-jokowi-kita-ingin-sehat-tapi-juga-produktif>.

Source: Worldometer, 2021

Sparrow, Dartanto, and Hartwig (2020) note that Indonesia was less responsive in the early days of Covid-19. While many countries in Asia and Western Europe have tightened the flow of people in and out to prevent Covid-19, Indonesia had not yet implemented significant policies by continuing to enforce normal human inflows from abroad. Unlike Singapore, for example, when it identified the spread of the virus, it responded by conducting rigorous screening of incoming travelers, travel restrictions, and rigid contact tracing. Although these measures were initially effective, in April, infections began to rise, prompting Singapore to go into lockdown, closing schools, universities and workplaces to reduce the number of daily cases. Thailand, Vietnam and Malaysia have also imposed lockdowns and have succeeded in flattening the Covid-19 curve and minimizing new infections.

Still, from Figure 2, the daily case figure continues to increase from June 2020 to early February 2021 with various accumulated reasons. Among other things, the cluster after the Eid homecoming<sup>10</sup>, relaxation of PSBB<sup>11</sup>, proclamation of new normal<sup>12</sup>, and the climax of the campaign period for regional head elections (*Pilkada*)<sup>13</sup> until the simultaneous regional elections in December 2020<sup>14</sup>. The effect of this election made the PSBB policy look like a policy that was only on paper, but not implemented. Daily cases continue to rise at the end of January 2021, with daily cases reaching 14,000 people positive for Covid-19.

### III. Review of Government Programs on the Response to Covid-19

#### 3.1. Large-Scale Social Restriction Policy (*Pembatasan Sosial Berskala Besar/PSBB*) and Enforcement of Restrictions on Community Activities (*Pemberlakuan Pembatasan Kegiatan Masyarakat/PPKM*)

Bappenas, in March 2021 published a book entitled Learning Studies on Covid-19 Handling. In one chapter, Vida Aulia Parady, et al. (2021) evaluate the implementation of the PSBB starting from the regulatory side to enforcement.

The implementation of PSBB is regulated based on Government Regulation (PP) Number 21/2020 concerning PSBB. The PSBB stipulation imposes requirements such as the number of cases and/or the number of deaths due to the disease, which has increased significantly and spread rapidly to several regions and has epidemiological linkages with similar incidents in other regions or countries. Minister of Health Regulation (*Permenkes*) Number 9/2020 concerning PSBB Guidelines as of April 3, 2020 further regulates the elaboration of the PP, which includes: 1) school and workplace holidays; 2) restrictions on religious activities; 3) restrictions on activities in public places or facilities; 4) restrictions on socio-cultural activities; 5) restrictions on the mode of transportation; and 6) restrictions on other activities related to defense and security aspects. The *Permenkes* cites WHO standards and criteria in outlining guidelines for the prevention and control of Covid-19.

In terms of implementing the PSBB policy, local governments must submit a PSBB application for their area to the Minister of Health. The first PSBB approved by the Minister of Health was in DKI Jakarta which began on April 10, 2020. The implementation of the PSBB was initially only for 14 days, but was then extended several times until the Governor of DKI Jakarta announced a transitional or easing PSBB on June 5, 2020. PSBB Policy in DKI Jakarta then followed by West Java since April 15, 2020, Banten on April 18, 2020, and

<sup>10</sup> BBC Indonesia, <https://www.bbc.com/indonesia/indonesia-53011687>.

<sup>11</sup> Merdeka, <https://www.merdeka.com/peristiwa/relaksasi-psbb-babak-baru-lawan-covid-19-hot-issue.html>.

<sup>12</sup> Tirto, <https://tirto.id/the-new-normal-gagal-kasus-corona-meningkat-resesi-menanti-f3tj>.

<sup>13</sup> CNN Indonesia, <https://www.cnnindonesia.com/nasional/20201017210618-32-559636/kasus-corona-meningkat-seiring-kampanye-langsung-pilkada-2020>.

<sup>14</sup> BBC Indonesia, <https://www.bbc.com/indonesia/indonesia-55321183>.

other provinces. Of the 18 regions that initially implemented PSBB (two provinces: DKI Jakarta and West Sumatra, and 16 districts/cities), as of September 10, 2020, only 7 regions were still implementing PSBB.

Observations made by Parady et al. (2021) regarding the implementation of the PSBB, point that several things need to be underlined. PSBB is an effective intervention to slow down people's mobility, directly affecting the Covid-19 reproductive rate (R). The PSBB is also considered to be able to limit the movement of the community better than the policy on the prohibition of going back and forth to the national government on April 21, 2020 or the policy for determining the status of a public health emergency which was stipulated on March 31, 2020. However, the implementation of the PSBB is considered ineffective. One of the causes is the still mobility of a number of workers, or mobility between locations, and provinces in Java or outside Java.

Until early October 2020, entering the 41st week of the pandemic, Indonesia's region's positivity rate is still relatively high, namely 13.6% or 2.7 times higher than the WHO target. In addition, although the cumulative mortality rate seems to have decreased, until week 41 it is still relatively high (3.5%)<sup>15</sup>. Analysis of the team from the Faculty of Public Health, University of Indonesia (FKM UI) shows that from April to September 2020, in the territory of Indonesia, a decrease in the proportion of the population living at home was followed by an increase in the estimate of new cases (onset) per day. When the proportion of the population at home alone is above 40%, there is no increase in cases per day, and even tends to decrease, which is about 500 cases or onset per day. However, when the proportion of the population at home alone is less than 40%, then every 1% decrease in the population at home alone will increase the case estimate to 500 cases. Therefore, the proportion of people living at home should be more than 55%. Thus, it is recommended that social restrictions be tightened so that the implementation of the PSBB can successfully reduce the rate of spread of Covid-19.

Of all regions, apart from DKI Jakarta, which have implemented the PSBB, no one has succeeded in reducing the rate of the spread or transmission of Covid-19. In the period from June to September 2020, positive cases of Covid-19 in Indonesia accelerated rapidly, with an additional 50,000 new cases in less than a month.<sup>16</sup>

As a result, the second PSBB must be reinstated in DKI Jakarta from September 14, 2020 to October 11, 2020 according to the governor of DKI Jakarta No. 959/2020 concerning the Enforcement of the PSBB Implementation in Handling Covid-19. The PSBB was implemented because of the speedy growth rate of new cases, the shrinking availability of inpatient rooms in hospitals, the lack of human resources for treatment, and the result of positivity rates that were higher than the figures set by WHO<sup>17</sup>. The five factors stipulated in the second PSBB policy for DKI Jakarta are: 1) Limitation of social, economic, religious, cultural, educational and other activities; 2) Control of mobility; 3) Controlled isolation plan; 4) Fulfillment of basic needs; and 5) Enforcement of sanctions.

After more than a month of implementing the progressive regulation sanction, there is no visible impact on the compliance of DKI Jakarta residents. According to the Governor of DKI Jakarta Anies Baswedan, the level of compliance of residents in using masks is still below the minimum standard, as revealed by the FKM UI study, which shows that the use of masks for residents in DKI Jakarta is still around 70 percent. In comparison, the minimum

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<sup>15</sup> Kemenkes, <https://www.kemkes.go.id/article/view/20112200001/covid-19-dalam-angka-per-21-november-2020.html>.

<sup>16</sup> Kompas, <https://megapolitan.kompas.com/read/2020/07/28/15185491/membandingkan-tren-penambahan-kasus-positif-covid-19-sejak-psbb-hingga?page=all>.

<sup>17</sup> Tempo, <https://metro.tempo.co/read/1385389/anies-baswedan-terapkan-psbb-total-lagi-dprd-dki-keputusan-sulit>.

standard is 85 percent. The implementation of the PSBB policy has not been effective in encouraging the desired behavior from the community. Community behavior is a determining factor in achieving the objectives of implementing the PSBB. This is exacerbated by the absence of clear legal consequences for the offender, a lack of socialization to the community, and the unavailability of alternative activities that can be carried out.<sup>18</sup>

The replacement of the Minister of Health at the end of 2020 also brought changes to the policy of dealing with Covid-19, as well as the functioning of the Committee for Handling Covid-19 and National Economic Recovery (KPCPEN) chaired by the Coordinating Minister for the Economy which was formed in June 2020. One of the new policies is the end of the PSBB and changes to the Enforcement of Restrictions on Community Activities (PPKM) which was proclaimed by the Chairman of KPCPEN on January 7, 2021 with the first phase implementation locus in Java and Bali<sup>19</sup>. The government has begun to restrict community activities due to the high number of corona cases from January 11 to 25, 2021 in Java and Bali.

Like PSBB, PPKM is also evaluated every 2 weeks and is extended by 2 weeks. The government continues to extend the PPKM validity period until April 2021<sup>20</sup>. The government stated that PPKM was quite successful in halting the rate of adding Covid-19 cases. At a press conference by the Head of KPCPEN as of March 18, the rate of active cases in Indonesia was 9.12 percent, better than the world average of 17.23 percent. The 88.16 percent cure rate is also better than the global cure rate of 80.56 percent. Meanwhile, the death rate was 2.71 percent, slightly higher than the world average of 2.21 percent.

The PSBB and PPKM policies have been running for about a year and various obstacles have appeared here and there. Considering that Indonesia has never imposed a lockdown policy, automatically the success of dealing with Covid-19 is very dependent on the PPKM policy.

### 3.2. National Vaccine Program

*"Vaksinasi adalah game changer (Vaccine is a game changer)"*<sup>21</sup> said President Joko Widodo about the imminent realization of the implementation of the national vaccine program. According to him, pandemic control, primarily through vaccination, is a game-changer, which is a very decisive key. People can work again, and children can study at school again, return to worship in peace, and immediately revive the national economy. President Joko Widodo became the first recipient of the Covid-19 vaccine on January 13, 2021, with high hopes that the pandemic will end soon.

The government plans to provide free vaccines to all Indonesians with the spirit of reducing the transmission of Covid-19, reducing morbidity and mortality due to Covid-19, and achieving herd immunity. Group immunity in the community can only be formed if vaccination coverage is high and evenly distributed throughout the region. The Ministry of Health schedules this program in 2 batches (Figure 3). First, human resource groups engaged in the health sector, such as doctors, nurses, pharmacists, and medical and support personnel in health facilities. Second, the State Civil Apparatus (ASN), both at the central and regional levels, together with the elderly population groups. Groups 1 and 2 are

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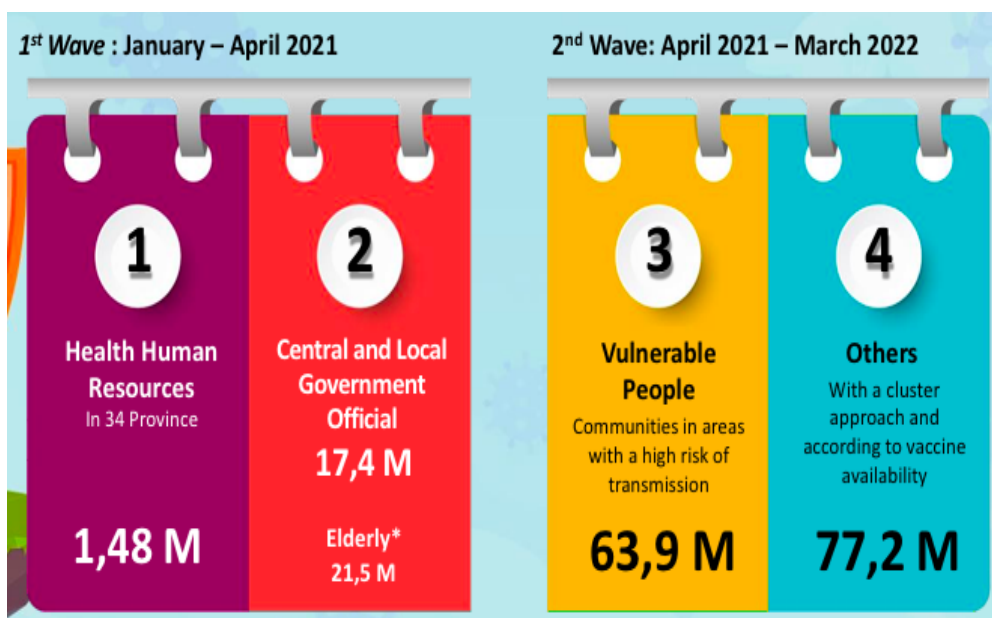
<sup>18</sup> LIPI, <http://ipk.lipi.go.id/index.php/berita/712-survei-ketahanan-sosial-masyarakat-selama-psbb>.

<sup>19</sup> Kompas, <https://nasional.kontan.co.id/news/bukan-psbb-pemerintah-pakai-istilah-baru-ppkm-dalam-pembatasan-kegiatan-ini-bedanya>.

<sup>20</sup> Sekretariat Kabinet, <https://setkab.go.id/pemerintah-perpanjang-dan-perluas-pelaksanaan-ppkm-mikro-hingga-5-april-2021/>.

<sup>21</sup> Antara News, <https://www.antaraneews.com/berita/1949112/jokowi-vaksinasi-adalah-game-changer-kunci-yang-menentukan>

expected to be reached within 3 months between January and April 2021 and cover nearly 40 million people.



**Figure 3.** Schedule of National Vaccine Program

Source: Ministry of Health, 2021

However, developments from several European countries that have implemented vaccination programs ahead of time highlight that health protocols must not be lax. The existence of a new variant B117 which is said to have originated from the UK has made several European countries that had previously relaxed their lockdowns along with the vaccination program and the number of cases has drastically decreased, are now tightening lockdowns again<sup>22</sup>.

Most of Europe is now considered to be in the third wave of Covid-19. Now European countries are also at the crossroads of whether to continue with AstraZeneca's vaccination program or stop it. Experts are still reviewing it, and the government is taking preventive action by reimposing a strict lockdown<sup>23</sup>.

A more recent development is the collapse of India in March 2021 until now. India has successfully administered vaccinations to its nearly 127 million people. This vaccination program was followed by relaxation of the lockdown. But what happened, the Indian people became ignorant of the health protocol, then in a short time, the number of cases grew more extensive, the number of deaths increased dramatically, and many hospitals and health facilities collapsed<sup>24</sup>.

India, one of the producers of the Covid-19 vaccine under the AstraZeneca brand, is threatened by the 3rd wave of the Covid-19 crisis. India is one of the largest Covid-19 vaccine

<sup>22</sup> Republika, <https://www.republika.co.id/berita/qpn01k368/mengenal-varian-baru-covid19-b117>.

<sup>23</sup> The Guardian, <https://www.theguardian.com/world/2021/mar/22/lockdowns-return-extended-third-wave-covid-europe>.

<sup>24</sup> BBC, <https://www.bbc.com/news/world-asia-india-56345591>.



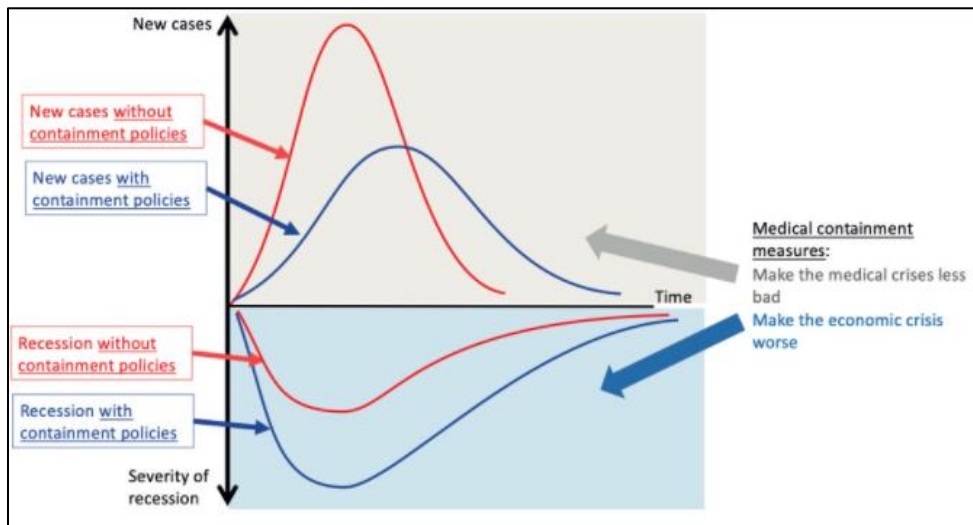
producers globally, and the Serum Institute of India has been allocated to produce one-third of the global supply of AstraZeneca vaccines. in 2021<sup>25</sup>.

Europe and India are valuable lessons when the case curve is down and vaccination programs are working. One of the main things and should not be left behind is to maintain strict health protocols and each country must not rush to relax its lockdown policy.

Indonesia has time to anticipate the explosion of this third wave of Covid-19, even though the available time is not much, and policy anticipation must be carried out quickly and precisely.

#### IV. Progress of Indonesia Development in 2020 and Indonesia Development Planning 2021

Baldwin and Mauro (2020) explain the relationship between efforts to control Covid-19 and the economic impact. To prevent the wider spread of the Covid-19 outbreak (flattening the curve), a policy is needed to implement a health protocol in the form of physical distancing and social restrictions. This policy choice has the consequence of significantly reducing community and business activities. The output then came under pressure, pushing the economy to continue to slow down into a recession. To prevent a deeper recession, the Government needs to issue a stimulus policy. Policy priority is given to mitigating negative impacts on vulnerable groups of people and the business world to not lead to bankruptcy. The stimulus policy was also carried out so that the decline in welfare felt by the community would not have negative impacts outside the economy, such as social and/or political unrest (Eka Chandra Buana et al., 2021).



**Figure 4.** Containment policies flatten the medical curve, but steepen the recession curve

Source: Baldwin and Mauro, 2020

<sup>25</sup> ABC News, <https://www.abc.net.au/news/2021-04-29/india-covid-crisis-disrupting-coronavirus-vaccine-supplies/100100324>.

#### 4.1. Indonesia Economy in 2020

Observing the history of the economic crisis that hit Indonesia, many parties will be grateful, considering the impact of the Covid-19 pandemic on the economy is no more severe than the monetary crisis in 1998. The Indonesian economy in 2020, which was under tremendous pressure due to the Covid-19 pandemic, grew minus 2.1 percent. This is the first time since the Asian economic crisis in 1997—1998. Compare with 1998 where economic growth reached minus 13.3 percent (figure 5). However, this negative growth can bring Indonesia down into the Lower Middle Income Countries category, after having entered the Upper Middle Income Countries category in 2019. In addition, Indonesia's target to become a high-income country has the potential to be achieved longer. It requires higher economic growth than the scenario in Indonesia's 2045 vision (Bappenas, 2021b).

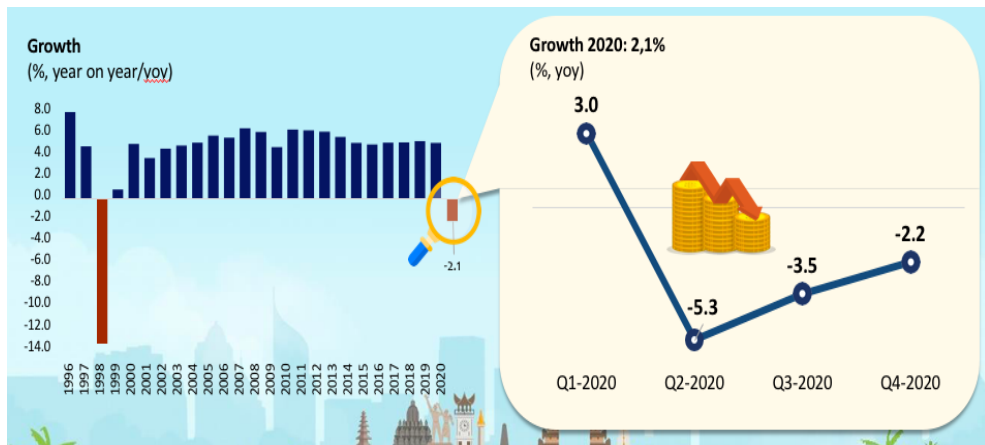


Figure 5. Indonesia Economic Growth

Source: BPS compiled by Bappenas, 2021b

Economic growth in the fourth quarter of 2020 contracted by 2.2 percent. Even though it is still contracting, this realization continues to improve compared to the second and third quarters of 2020, which is contracted by 5.3 and 3.5 percent, respectively. Furthermore, when compared to other countries, Indonesia's economic contraction was also relatively more minor. This shows that Indonesia is currently on the right path to recovery. However, more effort is still needed to achieve the 2021 economic growth target of 5.0 percent.

#### The sector of SMEs (Small Medium Enterprises), Industry, Tourism, and Creative Economy

During the Covid-19 pandemic, a survey conducted by BPS (2020a) showed that more than 80 percent of companies experienced a drastic decline in income. The business world's decrease in income was felt, both small and large, in various sectors. However, SMEs and low value-added companies felt the most significant impact. The decline in SMEs income fell by more than 50 percent, compared to large companies, which fell by around 29 percent (Eka Chandra Buana, et al., 2021).

Social restrictions in place caused more than 60 percent of companies to stop their business during the pandemic. Based on the results of a World Bank survey (Aufa Doarest, et al., 2020), as of June 2020, 40 percent of companies have temporarily stopped, about 20 percent

were still closed at the time of the survey, and 2-3 percent permanently stopped their business. The same survey showed 9 percent of companies declared bankruptcy. Stoppages of business and decreased income have resulted in production capacity being below 70 percent. About 13 percent of business operators in the World Bank survey reduced the number of workers, either by reducing working hours, or laying off workers.

Meanwhile, the decline in the performance of the manufacturing industry was strongly influenced by the cessation of supply of imported raw materials as a result of the cessation of foreign trade activities in countries of origin. This condition resulted in some companies unable to carry out production. Industries that can still provide raw materials and substitution support materials that come from within the country or from other import sources are still facing obstacles in the form of higher prices. The same condition occurs in Indonesia, where distribution/logistics channels are disrupted due to mobility restrictions. The impact is felt in the form of additional costs that reduce the company's level of profit and become a burden on the end consumer.

The decline in production also means that some people lose their jobs and income. This condition, coupled with restrictions on mobility during the PSBB, led to a decline in people's income and interest in spending. As a result, a vicious circle was born, where the weakening of consumption/demand then forces the industry to reduce its activities. The utilization of production capacity during the pandemic period is at a level of less than 50 percent, or far down from the normal period, which reaches 80-90 percent. Lower sales and higher production costs subsequently lowered the quality of the financial condition of non-oil and gas processing industry players, with the most significant impact on the quality of the company's cash flow. Most large and medium industrial companies in the labor-intensive non-oil and gas processing industry sub-sector stated that companies experience financial difficulties to pay regular fixed costs such as payment of BPJS Health contributions, employee support costs and minimum electricity costs to PLN. Many companies decide to stop production in non-oil and gas processing companies with high energy use characteristics (energy-intensive) because of the high fixed costs. The impact is on the much-reduced production volume and the reduction of employee working hours, temporary layoffs, and even layoffs (layoffs) of employees.

Since the Covid-19 pandemic, world tourism activity has decreased significantly. Cumulatively, the number of foreign tourists visiting Indonesia in January-September 2020 only reached 3.56 million people or decreased by 70 percent from the previous year.

The significant decrease in domestic tourist visits occurred in line with large-scale social restriction policies, government policies to reduce collective leave on religious holidays, travel restrictions, and the general public's perception of the dangers of a pandemic. This condition can be observed from the development of passengers in various main transportation modes. Total domestic travel activity in aircraft modes, train and ship transportation during January-September 2020 decreased by 53.8 percent (YoY). The number of domestic plane passengers was only 23.5 million people or decreased by 58 percent (YoY) in the January-September 2020 period. The number of train passengers and ship passengers in the same period also dropped significantly, each by -53.8 percent and -39.5 percent (YoY). The Indonesian Hotel and Restaurant Association stated that 1,642 hotels and 353 restaurants had closed due to the pandemic and caused layoffs (PHK). Overall, around 2.6 million formal and informal workers in the tourism sector are estimated to be affected by the Pandemic consisting of 1 million fully unemployed / moving to other sectors, 1.2 million experiencing reduced hours of work / underpaid / underemployed, and 0.4 million formal tourism workers have shifted to informal tourism workers.

The study conducted by the Ministry of Creative Economy in April-May 2020 on business actors in 17 creative economy sub-sectors also shows the significant impact of the Covid-19 pandemic for creative economy players. This impact appears in the form of, among others (i)

around 90 percent of creative business actors experience cancellations of activities related to busy people such as filming, talk shows, concerts and so on; (ii) around 70 percent of business operators experience suspension of ongoing work activities such as research and field surveys; (iii) around 65 percent of business operators experience suspension of activities in the workplace such as training or workshops; and (iv) 50 percent of business actors experiencing cancellation of meetings with clients. This condition requires handling to maintain the resilience of creative efforts during the Covid-19 pandemic and increase the readiness of creative businesses to become active again during the recovery period. The Media and Creative Industry Workers Union for Democracy estimates that the income lost due to job cancellations in March - July 2020 is quite diverse, from IDR 6 million to 60 million with the most groups in the range of IDR 15 million.

Despite the potential positive impact of digitalization, only about 18 percent of creative businesses have switched to online platforms, mainly in the advertising and games subsector. At the same time, the rest must be canceled/suspended. In the creative enterprise value chain, Covid-19 causes a decrease in demand and production capacity. The subsectors that require physical interaction experience the most decline in demand and production. Demand and production disruptions also make it difficult for creative businesses to access funding. The good news is that Government policies related to social restrictions open up opportunities for the creative economy sub-sector, namely the increased consumption of over-the-top (OTT) content in the film and video on demand (streaming film) subsectors, music, television, and games. During the initial period of the Covid-19 pandemic in March 2020, the use of video streaming applications for Indonesians increased by 15 percent and is predicted to continue to increase. In addition, there was an increase in the download of online shopping applications by 10 percent until the end of the period March 2020. However, on the other hand, the film industry also recorded a loss of income of around Rp. 3 trillion when the number of domestic OTT channel subscribers continued to increase using foreign providers, as shown by a 15.8 million increase in new Netflix subscribers worldwide.

### **Impact on Government Finances**

To deal with the impact of the Covid-19 pandemic, the Government has taken quick steps, including efforts to restore the national economy. Accelerated measures for handling the Covid-19 pandemic are outlined in Government Regulation in Lieu of Law (PERPPU) Number 1/2020, passed into Law No. 2/2020 concerning State Financial Policy and Financial System Stability. The Government has the authority to relax the budget deficit policy beyond three percent at the latest until the end of the 2022 fiscal year. Several policy steps taken by the Government include refocusing and reallocating the budget for non-priority activities and providing stimulus for handling the impact of the pandemic and national economic recovery. These various stimuli are provided through tax incentives, additional state spending, and budget financing to deal with health problems, social protection, and support to the business world and the local government. The allocation provided by the Government for the PEN program reaches IDR 695.2 trillion, or an estimated equivalent of 4.2 percent of GDP.

However, on the other hand, as a result of the decline in overall economic activity, state revenue is expected to experience a sharp decline in 2020. When compared to 2019, state revenues and grants are expected to fall to more than IDR 250 trillion. Apart from the decline in economic activity, the decline in state income is also caused by the loss of potential income due to incentives in the form of tax relaxation. As a result of decreasing state income, while at the same time increasing expenditure allocations, the budget deficit is expected to reach 6.3 percent of GDP. In line with the increasing deficit, APBN financing is estimated to reach more than IDR 1,000 trillion, part of which will be paid through the issuance of debt securities. Debt stocks are expected to increase to close to 40 percent of GDP in 2020.

The government, together with BI has agreed to implement a burden-sharing mechanism to reduce future fiscal burdens.

### **Impact on the Financial Sector - Banking**

Learning from previous crises, either in Indonesia or in other countries, the economic crisis will worsen when the financial sector is affected. Therefore, preventing the crisis from spreading to the financial/banking sector is the key to holding back a more profound economic recession. Until the third quarter of 2020, the policy steps were taken by the government, monetary authorities, and financial authorities to assist the financial sector, one of which is debt restructuring, can keep the financial sector, including banking, in a relatively safe condition. Current banking conditions are relatively good, indicated by the Capital Adequacy Ratio (CAR), which is still above 20 percent, and Non-Performing Loans (NPL), below 5 percent. Third-Party Funds (TPF) continued to grow positively, while credit growth slowed down, indicating abundant liquidity in the banking sector.

### **4.2. Development Planning in RKP 2021**

The government of Joko Widodo-Ma'ruf Amin declared the RKP 2021 as a milestone for the acceleration of development disrupted by the Covid-19 pandemic throughout 2020, the first year of the 2020-2024 RPJMN period. The RKP 2021 carries the theme "Accelerating Economic Recovery and Social Reform" with six development focuses, namely: (a) recovery of the industrial, tourism, and investment sectors; (b) strengthening the food security system; (c) reform of the national health system; (d) reform of the social protection system; (e) reform of the disaster resilience system; and (f) strengthening human resources through vocational education and training.

This RKP 2021 by the government is also targeted to be a momentum to encourage social reform, both in the aspects of structural change and cultural change, mindset, and paradigm. One of the development goals for 2021 is also to provide better public services.<sup>26</sup>

Meanwhile, the national development target for 2021 is set to include two key components. First, economic recovery with an economic growth target of 5.0 percent, an open unemployment rate of 7.7-9.1 percent, a Gini ratio of 0.377-0.379, and a reduction in greenhouse gas emissions of 29.85% to 30.64 percent in 2030. Second, improving the quality of human resources and maintaining people's purchasing power with a Human Development Index target of 72.78-72.95 and a poverty rate of 9.2-9.7 percent.

Efforts for economic recovery in 2021 will continue to be carried out by reactivating the engines that drive the economy, namely industry, tourism, and investment, through improvements in various aspects. In 2021, the Indonesian economy is expected to grow 4.5-5.5 or a midpoint of 5 percent with a V-shape recovery. This economic growth requires Rp 5,800-5900 trillion, with the private sector contributing the most. Thus, the private sector has an important role to play in economic growth in 2021. Domestic investment will continue to increase, and the tourism sector is expected to recover gradually. In contrast, the industrial sector is targeted to recover and grow by five percent so that the workforce absorbed is 18.4 million people.

Bappenas calculations show that due to the Covid-19 pandemic, the loss of people's purchasing power caused by a loss of income of IDR 374.4 trillion, where this loss results

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<sup>26</sup> It was delivered at the End of Year Press Conference for RKP 2021, which was chaired directly by the Minister of National Development Planning / Head of Bappenas and echelon 1 officials of the Ministry of National Development Planning / Bappenas—quoted from Bappenas, <https://www.bappenas.go.id/id/berita-dan-siaran-pers/gelar-konferensi-pers-akhir-tahun-bappenas-paparkan-rkp-2021-capaian-sdgs-indonesia-dan-transformasi-ekonomi/>.

from a decrease in working hours in the industrial and tourism sectors. The Covid-19 pandemic also caused the industrial utilization rate to fall by 55.3 percent from the previous point, namely 76.3 percent. To accelerate the Indonesian economy, especially to get out of the middle income country trap, economic transformation is needed, because it is impossible to return the gross domestic product to the figure before the crisis. The key to economic transformation is to change the economy's structure from low productivity sectors to high productivity sectors. Regarding investment needs, in 2021, with an economic growth target of five percent, an investment of IDR 5,800-5,900 trillion is needed.

The economic recovery will also be supported by infrastructure development to increase the infrastructure stock, which has only reached 43 percent of GDP. One of the issues discussed is transportation, which causes Indonesia's logistics costs to be very high and less competitive, resulting in a lousy domino effect on all sectors, including the quality of health and national economic transformation. The development of an integrated port and an integrated airport network that will be a link for development is also one priority. Infrastructure development that supports structural reforms and economic transformation, including digital transformation, is essential in boosting the economy, especially trade, education, and health activities.

The RKP 2021 was also stated as one of the steps in carrying out economic transformation to bring Indonesia to become a developed country before 2045. For this reason, the government has adopted six strategies for Indonesia's economic transformation. The First Strategy: Competitive Human Resources, which includes the health system, education (education system and character education), and research and innovation. Second Strategy: Economic Sector Productivity includes Industrialization, Productivity of MSMEs, and Agricultural Modernization. Third Strategy: Green Economy includes a low carbon economy, blue economy, and energy transition aimed at meeting increasing energy needs, opening more sustainable green job opportunities, and supporting the reduction of greenhouse gas emissions. Fourth Strategy: Digital Transformation consists of, digital infrastructure, digital utilization, and enabler strengthening. Fifth strategy: domestic economic integration includes economic powerhouses focusing on connectivity infrastructure: superhubs, sea hubs, air hubs, and the domestic value chain. Sixth Strategy: Relocating the National Capital as a source of new growth and balancing the economy between regions.

For the agricultural sector growing positively in 2020, a national food system development strategy will be applied, from upstream to downstream. This downstream is an effort to improve the welfare of farmers. Energy security in 2021 is targeted to continue running well in energy availability, mix, and access. Three dimensions focus on energy security, namely energy security, namely how countries provide energy now and in the future, then equity to provide energy, to environmental sustainability related to the transition to guaranteed and emission-free energy.

In the social sector, reducing unemployment through economic recovery was implemented in parallel with the enactment of the Job Creation Law and increased investment. Job loss security is in addition to the social security scheme, which is closely related to the ability to provide training and employment. The government also ensures pick-up services in the Population and Civil Registry (*Dukcapil*) services to register residents and strengthen the integrated social security system, including ensuring inpatient classes and job security.

Economic transformation can also be pursued through Sustainable Development Goals (SDGs). Even though the Covid-19 pandemic has been impacted from an environmental, social, and economic perspective, the achievements of Indonesia's SDGs should be appreciated considering that Indonesia is one of the six countries with the best Voluntary National Review formulation. Indonesia has also succeeded in recording the Goal 16 Report, which consists of peace, justice, and strong institutions as one of the best in the world. Based

on the 2019 Indonesia SDGs Implementation Report, it is illustrated that of the 280 indicators, around 52 percent have reached the target set in the 2017-2019 National Action Plan (RAN), 18 percent indicate an improving trend, and 30 percent that requires special attention. Special attention related to the achievement of the SDGs includes: (a) the rate of poverty reduction, which is getting slower; (b) prevalence of stunting; (c) solid waste; (d) deficiency of micronutrients which is still relatively high in children under five; (e) the need to improve the quality of learning and teaching; (f) more efficient use of energy; (g) gap reduction; (h) ineffective marine conservation management; (i) as well as the availability of quality data to support appropriate planning and policymaking. Indonesia also has 29 provinces that have SDGs Regional Action Plans. Around 100 companies listed on the Indonesia Stock Exchange have also submitted Sustainability Reports as participation reports in implementing the SDGs.

The SDGs also ensure sustainable development, emphasizing the importance of harmony between the economy and environmental preservation. The government claims that economic transformation includes a green and low-carbon economy that protects long-term prosperity. The green economy emphasizes creating new job opportunities (green jobs) and new investments (green investments), encourages low-carbon economic growth, and increases the carrying capacity of natural resources and the environment. The strategy carried out includes developing new and renewable energy, the application of a circular economy, construction of waste and B3 processing facilities, sustainable land restoration, and sustainable agricultural development.

#### **4.3. Development Funding for Major Projects in RKP 2021**

To achieve the targets of the programs described above, the government has allocated around IDR 567.9 trillion, which is distributed to 12 major projects spread over 7 national priority programs. The State Budget 2021 alone allocates Rp. 113.9 trillion, where the remaining needs will be met with various other financing schemes.

As seen in Table 1, the national priority of Improving Quality and Competitive Human Resources is the largest allocation of IDR 257.32 trillion. At the same time, the second is the national priority of Strengthening Infrastructure to Support Economic Development and Basic Services with an allocation of IDR 118.71 trillion.

**Table 1.** Allocation of Major Projects RKP 2021 by National Priority

No.	National Priority	Rp Billion
1	Strengthening Economic Resilience for Quality and Equity Growth	73.087,7*)
2	Developing Areas to Reduce Inequality and Ensure Equity	72.138,2*)
3	Increasing Quality and Competitive Human Resources	257.316,8*)
4	Mental Revolution and Cultural Development	4.797,6*)
5	Strengthening Infrastructure to Support Economic Development and Basic Services	118.712,4*)
6	Building the Environment, Enhancing Disaster Resilience, and Climate Change	10.468,2*)
7	Strengthening Polhukhankam Stability and Transforming Public Services	31.329,8*)
	<b>Total Amount</b>	<b>567.850,8*)</b>

Source: Bappenas (2020). \*) Provisional numbers

This relatively small amount of funding from the APBN is a consequence of the need for sufficient budget for the Covid-19 prevention program and the national vaccine program.<sup>27</sup>

Budget financing in the 2021 State Revenue and Expenditure Budget (APBN) reaches IDR 1,006.4 trillion. This budget financing decreased from the total financing in the 2020 State Budget, which amounted to IDR 1,039.2 trillion. The reduction in financing considers the 2021 budget deficit of 5.7 percent of gross domestic product (GDP), up from 5.5 percent of GDP this year. The increase in the budget deficit also considers the continuing economic uncertainty next year due to the impact of the Covid-19 pandemic.

The priority for handling Covid-19 and efforts for economic recovery will be continued in 2021, supported by the expansive-consolidative State Budget 2021 to respond to uncertainty. From the deficit side, the Government plans a budget deficit of 5.7 percent of GDP in 2021, in line with the increasing need for handling Covid-19 and the National Economic Recovery Program when the potential from the revenue side has not fully recovered. Meanwhile, to finance a deficit of IDR 1,006.4 trillion, debt financing in the 2021

<sup>27</sup> CNBC Indonesia, <https://www.cnbcindonesia.com/news/20210107090409-4-214064/buka-bukaan-sri-mulyani-soal-apbn-2020-hingga-dampak-covid-19/2>.



State Budget is recorded at IDR 1,177.4 trillion. This amount is an increase of around 34.9 percent from 2020, amounting to IDR 1,142.5 trillion.

The budget deficit will be covered by financing that prioritizes prudent, flexible and opportunistic risk management. The government always strives to meet the deficit from non-debt financing sources, primarily through SAL, before looking for sources of debt financing from the issuance of SBN and loans. The need for debt financing in 2021 is budgeted in the State Budget of IDR 1,177.4 trillion (net), consisting of the issuance of SBN amounting to IDR 1,207.3 trillion and a loan amounting to negative IDR 29.9 trillion.

The increase in debt financing consisted of government securities (net), which reached IDR 1,207.3 trillion. Then investment financing becomes IDR 184.5 trillion, another financing of IDR 15.8 trillion, loan liabilities of IDR 2.7 trillion and budget financing for lending of around IDR 0.4 trillion and reserved loans of IDR 29.9 trillion.

Furthermore, flexibility in program financing continues to be pursued, especially through Development Partners, both bilaterally and multilaterally. Finally, the participation of Bank Indonesia is still needed as a standby buyer/last resort in the primary market according to SKB I while maintaining the credibility of economic, fiscal, and monetary management. Meanwhile, BI's role in the burden-sharing scheme is similar to SKB II, which was implemented in 2020, not continued for this year.

## V. Conclusion and Recommendation

Several things that need to be noted about the Indonesian government's journey to tackle Covid-19 from March 2020 which has ruined the development planning set out in the RPJMN 2020-2024, RKP 2020 and RKP 2021, namely:

- 1) The Covid-19 pandemic has not yet passed, the positivity rate is still stable at a relatively high range in April 2021, and also, the death rate due to Covid-19 is quite frightening. Policies regarding health protocol must not weaken. The government needs to be careful in responding to this, given the need to push for policies on economic recovery, which tends to loosen up health protocols.
- 2) The PSBB policy throughout 2020 has had successes and failures. When the PSBB is appropriately implemented, the number of Covid-19 transmissions could be reduced, and on the other hand, when the government relaxes the PSBB, the result is a high number of transmissions.
- 3) The policy to replace PSBB. PPKM has the same function as PSBB. If done consequently, the results will be suitable where the number of Covid-19 transmissions can be reduced.
- 4) Vaccination programs that are already running and have been scheduled must continue to be implemented consequently so that achieving herd immunity can be quickly resolved. However, the government should not be careless about health protocols. The combination of the vaccination program and the PPKM must go hand in hand. Especially with the emergence of the Covid 19 B117 variant, which caused the third wave of attacks in Europe and India, the government must respond quickly and precisely.
- 5) The development program launched by the government in 2020 as stated in the RKP 2020 and RPJMN 2020-2024 experienced significant obstacles with the arrival of Covid-19. The government is determined to complete unfinished economic acceleration targets in 2020 by shifting it to 2021 and beyond. With a year's experience with Covid-19, the government should have understood how to implement programs for economic recovery properly and accelerate it without sacrificing

awareness of Covid-19.

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