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# INOVASI DALAM PEMBANGUNAN PERUMAHAN DAN PERMUKIMAN

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# Outline

1. Pengantar
2. Mengapa inovasi diperlukan
3. Pengalaman Negara Lain
4. *Lesson learned*
4. Tipologi
5. UDEVELOP
6. Penutup

# Pengantar

- SDG/NUA
- RPJPN/RPJMN
- Bappenas
- PUPR
- ATR





- Rumah/permukiman untuk siapa?
  - Berapa banyak?
- Di mana akan dibangun?
  - Kapan dibangun?
- Siapa membangun?
  - Dana dari mana?





# Mengapa Inovasi diperlukan



Backlog perumahan

**Table 2. Various Housing Backlog Estimates for Indonesia**

Backlog Estimates	Classification	Total Units	Annual Need to Reduce Backlog by 2020
Low Estimate	Only slum households	3.9 million	780,000
Middle Estimate	Only overcrowded units	7.5 million	1,500,000
High Estimate	Non-home ownership, reported by BPS and MPWH	13.5 million	2,700,000

Source: BPS and MPWH, 2013



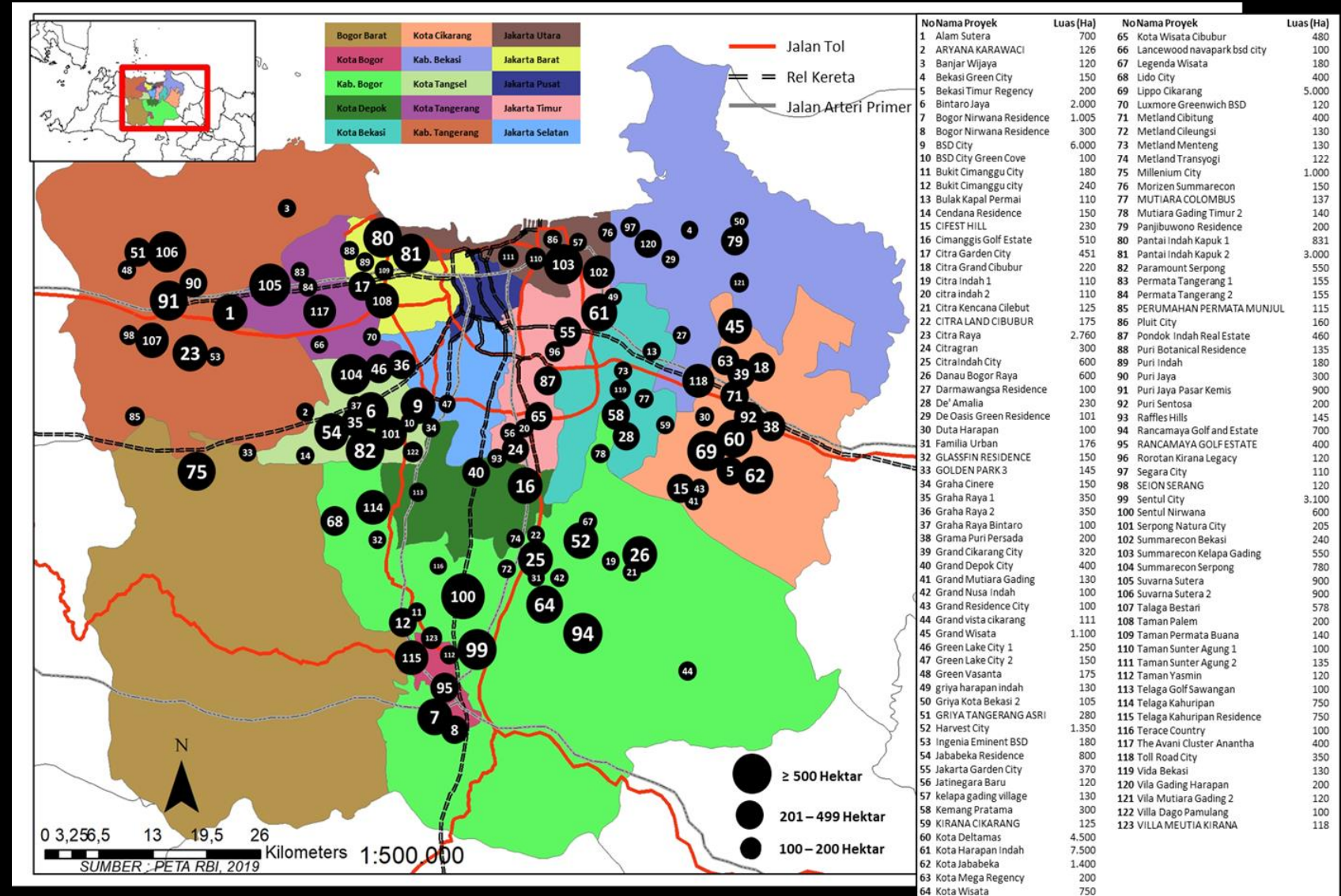
## Kebutuhan rumah

**Table 3. Estimated Characteristics of Housing Need**

	Annual Need to Address Housing Deficit by 2019	Annual Need to Address Housing Deficit by 2024	Annual Need to Address Housing Deficit by 2029	Objectives	Example of Policy Solution
Slum Units	780,000 units	390,000 units	260,000 units	0% Slums	Slum upgrading and home improvement subsidies.
Decile 1-4 (Non-Slum Households)	1.20 m units	780,000 units	650,000 units	Prevent formation of new slums, increase supply of affordable formal housing solutions.	New subsidized public rental and core starter units.
Decile 5-8	1.25 m units	810,000 units	660,000 units	Increase supply of low-cost housing to reduce backlog and meet new demand.	Introduce more effective mortgage-linked subsidy scheme to enhance affordability.
Decile 9-10	390,000 units	290,000 units	250,000 units	Enable formal housing market to work.	Support secondary mortgage market development.
<b>Total</b>	<b>3.6 million/yr</b>	<b>2.3 million/yr</b>	<b>1.8 million/yr</b>		



# Asymmetrical land ownership



Muhtadin, 2020



# Asymmetrical land ownership

Dari 1.161 proyek perumahan tapak di Jabodetabek, **123** nya adalah skala besar & dikembangkan oleh **86 pengembang**

123 proyek perumahan tapak skala besar menguasai 74,73% keseluruhan proyek perumahan tapak di Jabodetabek

Sumber:  
Muhtadin, 2020

Figure 1. Estimated Housing Affordability in Indonesia in Market Conditions\*

Household Decile	Monthly HH Income (m, IDR)	Monthly Payment Capacity^ (m, IDR)	Estimated Affordable Home Price w/ Loan Alone (m, IDR)	Estimated Affordable Home Price w/ Down Payment (m, IDR)
10	13.9	5.6	463 million	661 million
9	7	2.6	216 million	309 million
8	5.2	1.8	99 million	110 million
7	4.2	1.4	74 million	82 million
6	3.6	1.1	44 million	49 million
5	3.1	0.9	38 million	43 million
4	2.6	0.7	18 million	19 million
3	2.1	0.5	13 million	14 million
2	1.8	0.4	6.7 million	6.7 million
1	1.2	0.1	2.3 million	2.3 million



Can Afford Commercial Units



Cannot afford even basic core unit

Sumber:  
Bappenas, 2015

Only 20 percent of the highest income households in Indonesia, are capable of acquiring housing in the formal market





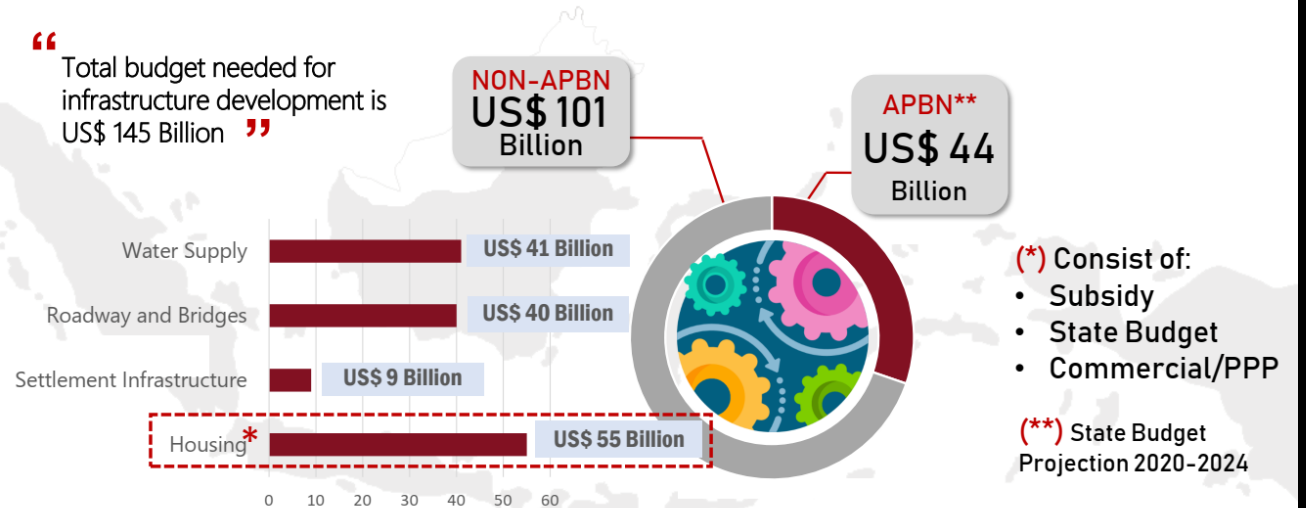
Dana tidak mencukupi



# Ministry of Public Works and Housing Republic of Indonesia

## Finance Challenges in Housing and Infrastructure Provision 2020-2024

“ Total budget needed for infrastructure development is US\$ 145 Billion ”



“ State Budget (APBN) only able to meet 30% of the total budget needed for infrastructure development ... ”

# ● Pengalaman Negara Lain

## Slum upgrading Urban Renewal

- Thailand
- India
- Singapore
- China



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Thailand

→ Baan Mankong (*secure housing*)

**Thailand's Baan Mankong  
Program Empowers Poor Communities to Take  
Ownership of Their Own Housing Development**

- Stakeholder Utama: -. Masyarakat
- Lembaga/ komite khusus: Codi



# Jepang (2)

## Roppongi Hills

- Kawasan yang direnewal: Kawasan permukiman padat penduduk
- Luas kawasan: 11.6 ha
- Lama proyek: 1986 – 2003
- Konsep pengembangan: Transit-oriented development (hunian, perkantoran, komersial dan hiburan dalam 1 kawasan yang berdekatan)
- Biaya: 4 milyar dollar Amerika



[www.mori.co.jp](http://www.mori.co.jp)



[Above] Roppongi Hills site before redevelopment. Google Earth historic image dated 31 December 1997.

[Below] Post-redevelopment. Google Earth historic image dated 31 December 2007



<https://urbancommune.net/2012/09/tokyo-and-the-roppongi-hills-in-december.html>

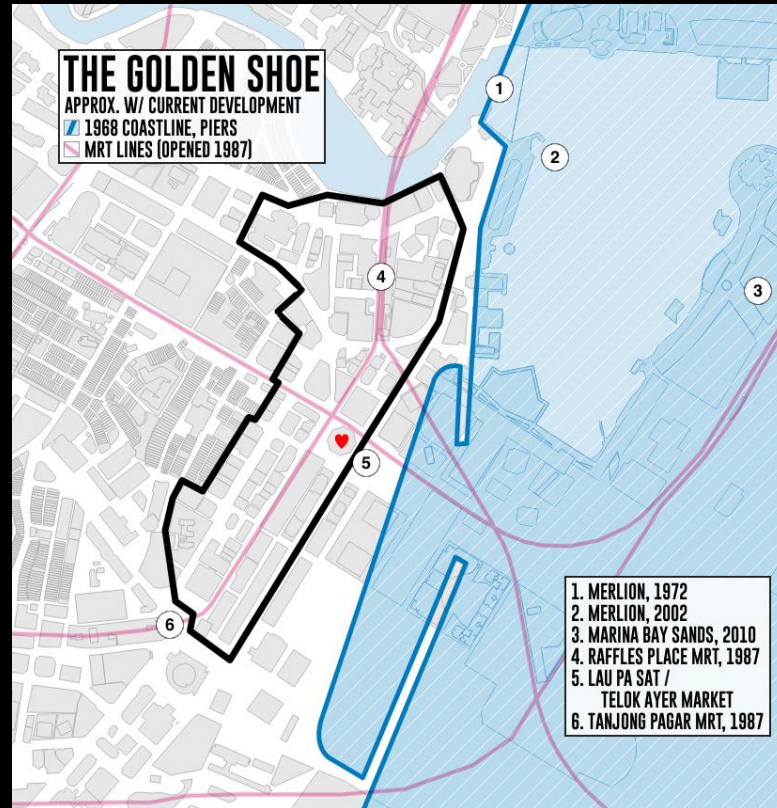


- Stakeholder Utama: - Tokyo Metropolitan Government; Pengembang swasta (Mori Building); Perusahaan swasta (TV Asahi); **Pemilik lahan (individu) (lebih dari 400 stakeholder)**. Pemerintah kota sebagai coordinator.
- Lembaga/ komite khusus: **Urban Redevelopment Union (institusi formal yang dibentuk oleh stakeholder)**
- Aturan khusus: **Pengembang swasta (Mori corporation) mengambil alih hak atas tanah dari kavling di Roppongi (lebih dari 14 tahun)**

<https://urbancommune.net/2012/09/tokyo-and-the-roppongi-hills-in-december.html>

# Singapura

## The Golden Shoe



Medium.com

- Kawasan yang direnewal: Pusat bisnis dan komersial (low-rise)
- Luas kawasan: 30 ha
- Lama proyek: 2003 - 2005
- Konsep pengembangan: Peremajaan kawasan pesisir Singapura menjadi daerah pusat komersial, hotel, perkantoran, dan hunian.
- Biaya: berasal dari pemerintah pusat (Consolidated Fund yang berisi pajak langsung, tidak langsung, perizinan, dan retribusi lain)

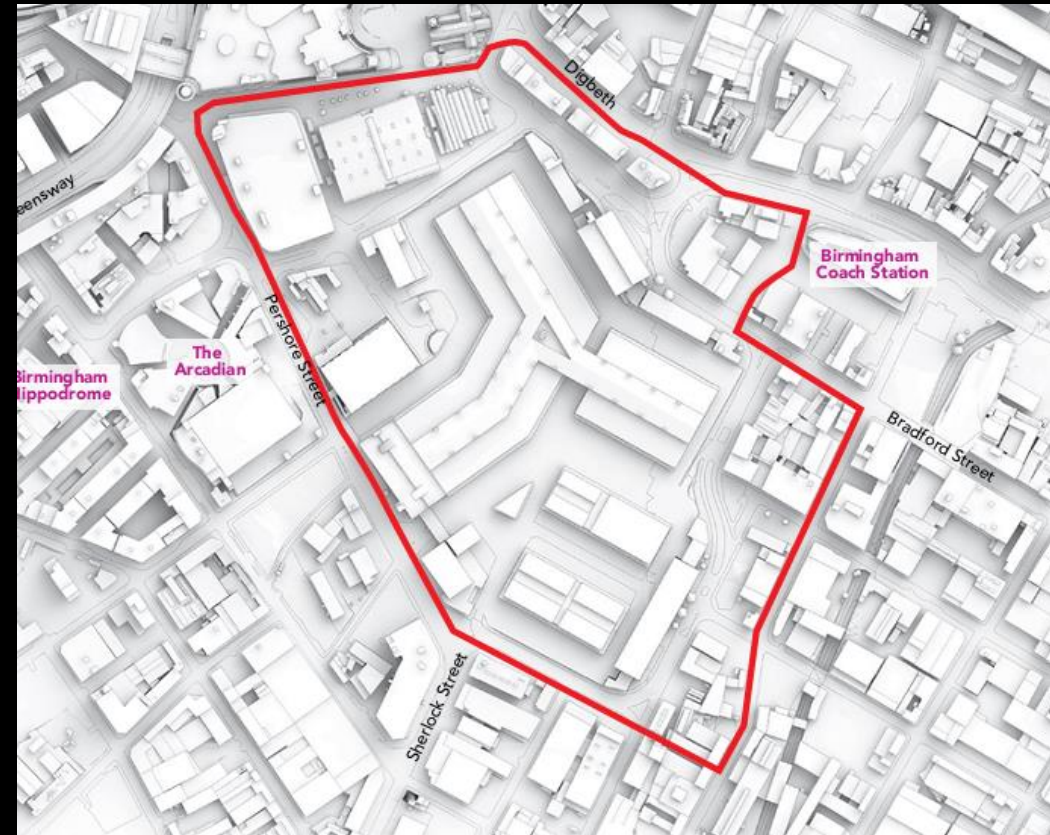
- Stakeholder Utama: Pemerintah Pusat
- Lembaga khusus: Urban Redevelopment Authority (URA) dan Urban Renewal Department (URD), housing and Development Board (HDB)
- Peraturan khusus: The Land Acquisition Act (1966) negara memperoleh tanah pribadi untuk kepentingan publik tanpa biaya yang berlebihan dan sistem pungutan pembangunan, yang mewajibkan pengembang untuk membayar kepada Negara bagian dari manfaat yang timbul dari pemberian izin pembangunan.



# Birmingham

## Smithfield

- Kawasan yang direnewal: Kawasan sekitar pasar grosir Smithfield
- Luas kawasan: 17 ha
- Konsep pengembangan: Kawasan mixed-use (hunian, perkantoran, pusat hiburan, fasilitas umum) terintegrasi dengan sistem transit.
- Biaya: 2.7 milyar dollar Amerika
- Stakeholder utama: Pemerintah Kota Birmingham dan bekerja sama dengan Lendlease (pengembang properti dan infrastruktur)
- Lembaga khusus: Pemerintah dan Lendlease
- Aturan khusus: Smithfield Big City Plan (rencana jangka panjang)



Sumber: Birmingham Smithfield Masterplan





Sumber: Birmingham Smithfield Masterplan

# Belajar dari Shenzen

- “..was to develop comprehensive economic development zones of considerable size in the peripheral and less developed regions of the country where foreign investors are provided with various incentives and preferential treatments to engage not only in manufacturing production but also in a whole range of economic activities from primary production to the tertiary sector (such as commercial activities real estate development and tourism). Shenzhe SEZ and Zhuhai SEZ belong to this mode!..” (Wong, 1987)

<https://news.cgtn.com/news/3d3d414d306b6a4d31457a6333566d54/img/7e33a80f00e9481aaf9f3302a44831fc/7e33a80f00e9481aaf9f3302a44831fc.jpg>



**Table 1.** Special Roles and Innovations in the Special Economic Zones

	Shenzhen	Zhuhai	Shantou	Xiamen	Hainan
Special roles	<p>Slow but steady shift to market conditions on a greenfield site (fishing village).</p> <p>Learn from Hong Kong methods of global capitalism, modern management methods; raise capital.</p>	<p>Capitalize on geographical proximity to learn from and work with Macao.</p> <p>A bridge to Europe and Portuguese-speaking countries; raise capital.</p>	<p>Hail from Chaozhou culture with extensive domestic and global links to overseas Chinese.</p> <p>Once second largest city in Guangdong, with a fair chance of rapid development.</p>	<p>Establish itself as a central city in southeastern China.</p> <p>Play a constructive role in peaceful relations with Taiwan.</p> <p>Possible free port status to facilitate cross-strait travel.</p>	<p>A model of reform with local characteristics.</p> <p>Tropical climate, rich resources, strategic location relative to Southeast Asia, and large land area are strengths to pursue special development.</p>
Innovations	<p>New contrast labor and wage system.</p> <p>New tender system</p> <p>Home-purchase scheme for workers</p> <p>First urban land development rights auction (1987)</p> <p>Separation of commercial functions from the state and government departments.</p> <p>Increasing emphasis on the role of the legal system and the democratic election of factory managers.</p> <p>First stock exchange in China (1990).</p> <p>Price reform system</p> <p>Market-led industrial upgrading (Wong, 1987; Huang, 2008)</p>	<p>First local legislation in China.</p> <p>Speed and success in developing infrastructure.</p> <p>A state-of-the-art airport built in 1994 but not founded on sound market principles.</p> <p>First (but abortive) plan to build bridge spanning the western and eastern sides of the Pearl River Delta.</p>	<p>Somewhat off-center location in terms of regional growth and institutional innovations</p> <p>Weakest of all SEZs in terms of innovation.</p> <p>First legislation in China on individual self-funded enterprises.</p>	<p>Particularized culture predicated on a competitive spirit to acquire efficiency, an entrepreneurial environment, an urge to innovate, and a healthy human environment.</p> <p>Four pieces of legislation in China on management of use of marine districts, scholars establishing new enterprises, marine traffic management, and minimum standards of life protection (Xiong, 2006).</p>	<p>Top-down administration from province to cities and counties; end of “small government” mentality.</p> <p>First in China to: abandon dual-track reporting on production/livelihood data; simplify procedures for company registration; implement ungated highways; implement comprehensive social insurance protection; and engage in large-scale infrastructure projects via a stock-sharing system</p>

Sumber: Yeung et al, 2009)

## Housing reform di Shenzen

### Sebelum reformasi 1988 an

- Perusahaan Milik negara (SOE) merupakan tulang punggung ekonomi China sebelum reformasi
- Perusahaan ini harus menyediakan rumah bagi karyawannya
- Welfare oriented Housing privision → membebani peerusahaan negara

Table 1. Employment groups in old and new SOEs

Pre-reform SOEs, mainly in the manufacturing sector	New SOEs in the financial, energy and other service sectors
Party leaders and managerial staff	Managerial and professional staff
Permanent workers hired before or since reform	
Retired workers	
Laid-off workers	
Contracted workers hired since reform	Contracted/short-term workers
Temporary manual workers, rural migrants	Temporary manual workers, rural migrants

(Sumber: Yeung et al, 2009)

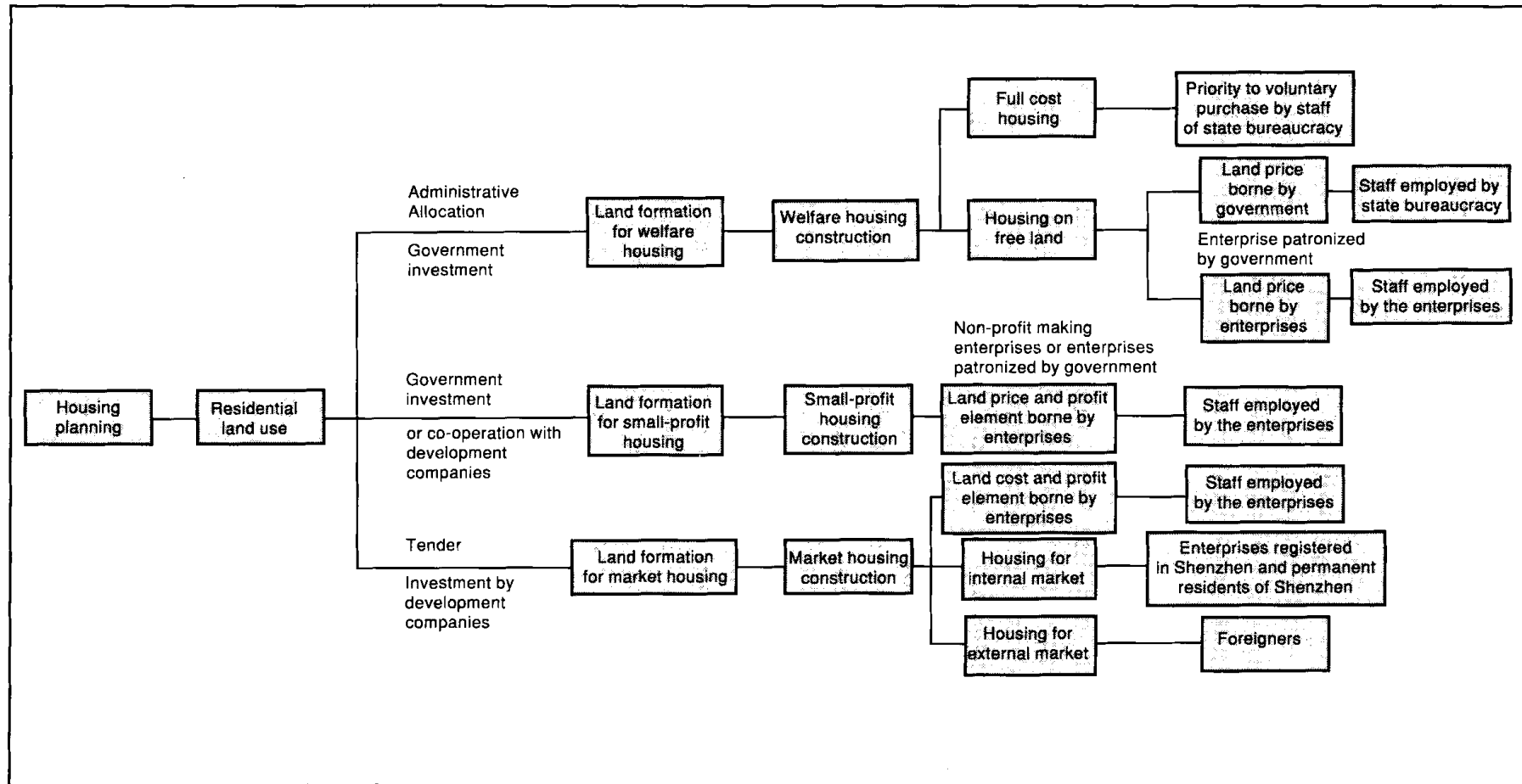
### Sesudah reformasi

Table 8. Housing reform practice in different enterprises

Housing reform policies	State-owned enterprises			
	Near to bankrupt	Performing poorly	Performing reasonably	Performing well and profitably
Sale of existing housing	Poor housing stock and late sale	Better housing conditions and early/cheaper sale of housing to occupiers		
Housing provident fund	Irregular contribution or very low level of contribution	Contribution at standard rate set by municipal governments		Generous contribution above official level
Building new housing for sale		Building for sale with workers bearing the full costs	Building for sale with some employer contribution	Buy high standard commercial houses for key and senior staff, then 'privatise' them cheaply
Housing co-operative			Setting up housing co-operatives	
Housing cash subsidy				Housing subsidies to employees following rules applying to government officials

(Sumber: Wang et al, 2005)

Figure 1 – Housing Provision in Shenzhen, 1992



Source : Modified after Shenzhen Housing System Reform Office (SHSRO), 1992, p.17

(Sumber: Chie, 1993)



## *Lesson Learned*



### Stakeholder

- Pemerintah (daerah/pusat)
- Swasta
- Masyarakat (pemilik lahan- hanya di jepang yang individu)
- Lembaga khusus



# Typology



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## Lokasi UR

Periurban		Kota		
kosong	kampung	Formal	Informal	Mix



## Keadaan perlu UR

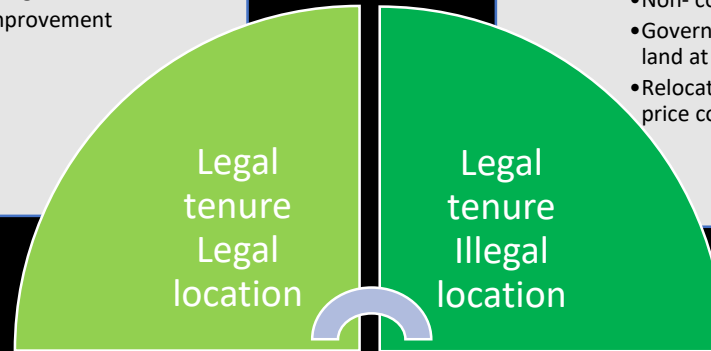
Formal area			
Decay	Blighted	Underutilised	Slum

# PZ/kepemilikan lahan



[https://s3.amazonaws.com/media.archnet.org/system/media\\_contents/contents/25720/original/IAA17119.jpg?1384701421](https://s3.amazonaws.com/media.archnet.org/system/media_contents/contents/25720/original/IAA17119.jpg?1384701421)

- Slum upgrading
- Kampung Improvement Program



- Non-conforming use
- Government buy the land at market price
- Relocation with market price compensation



[https://m.ayobandung.com/images-bandung/post/photos/2019/05/17/11004/ayobdg\\_cibiru-pertahankan-lahan-terbuka-hijau\\_kavin-faza2psd.jpg](https://m.ayobandung.com/images-bandung/post/photos/2019/05/17/11004/ayobdg_cibiru-pertahankan-lahan-terbuka-hijau_kavin-faza2psd.jpg)



<https://cdn2.tstatic.net/wartakota/foto/bank/images/20140520-kampung-deret-kapuk.jpg>

- Land sharing
- Squatter upgrading-legalized tenure



- Relocation
- Resettlements



<https://asset.kompas.com/data/photo/2016/04/20/151239420160402RAD151780x390.JPG>





# UDEVELOP inovasi perumahan



## Konsep UDEVELOP

*Urban DEvelopment trough LOcal Partnership*

UDEVELOP is an area redevelopment/renewal concept

UDEVELOP facilitates partnerships between stakeholders in urban development to create better urban environment

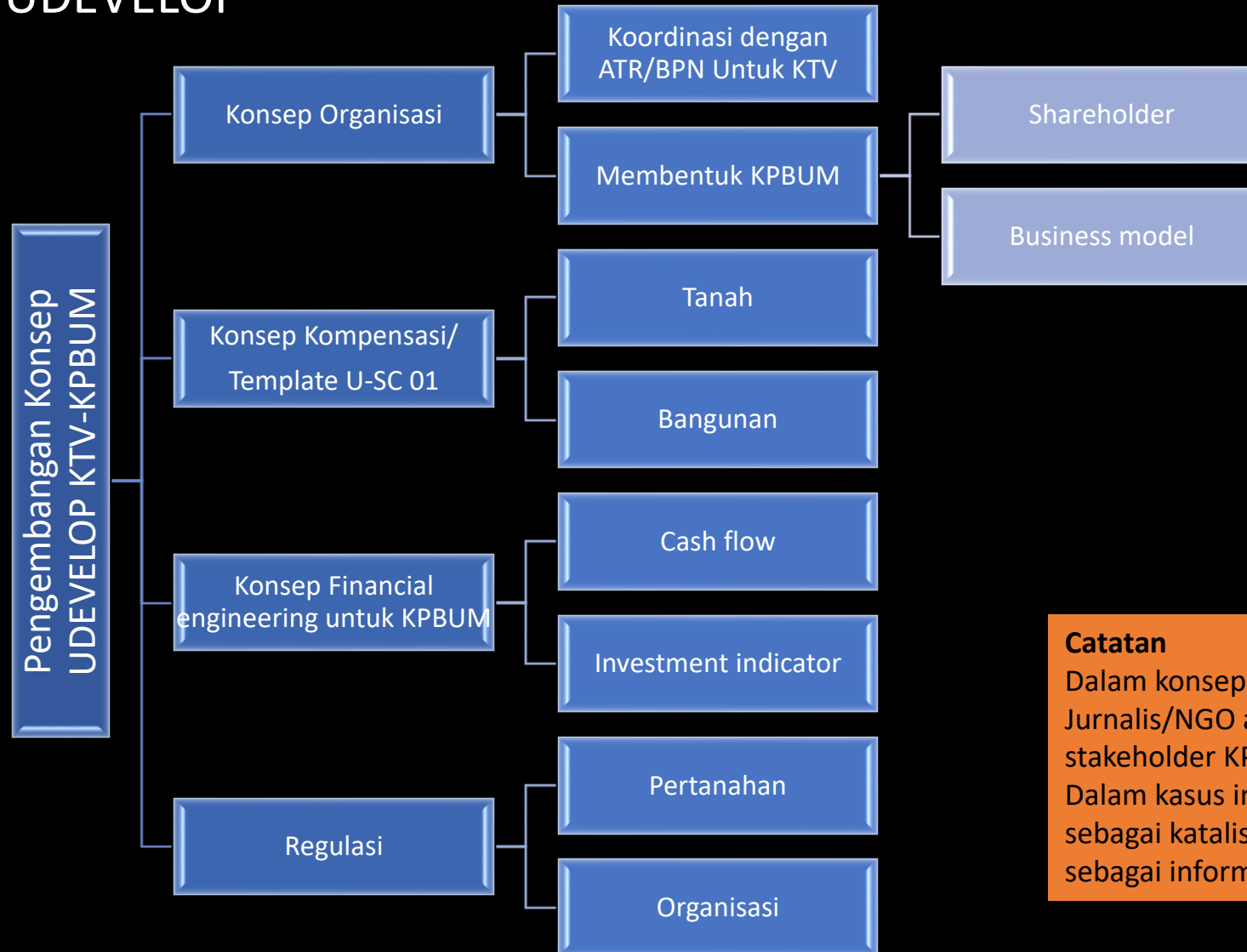
UDEVELOP is a tool for Urban Development

UDEVELOP Is PPPP – Public Private People Partnership

UDEVELOP is urban development without eviction



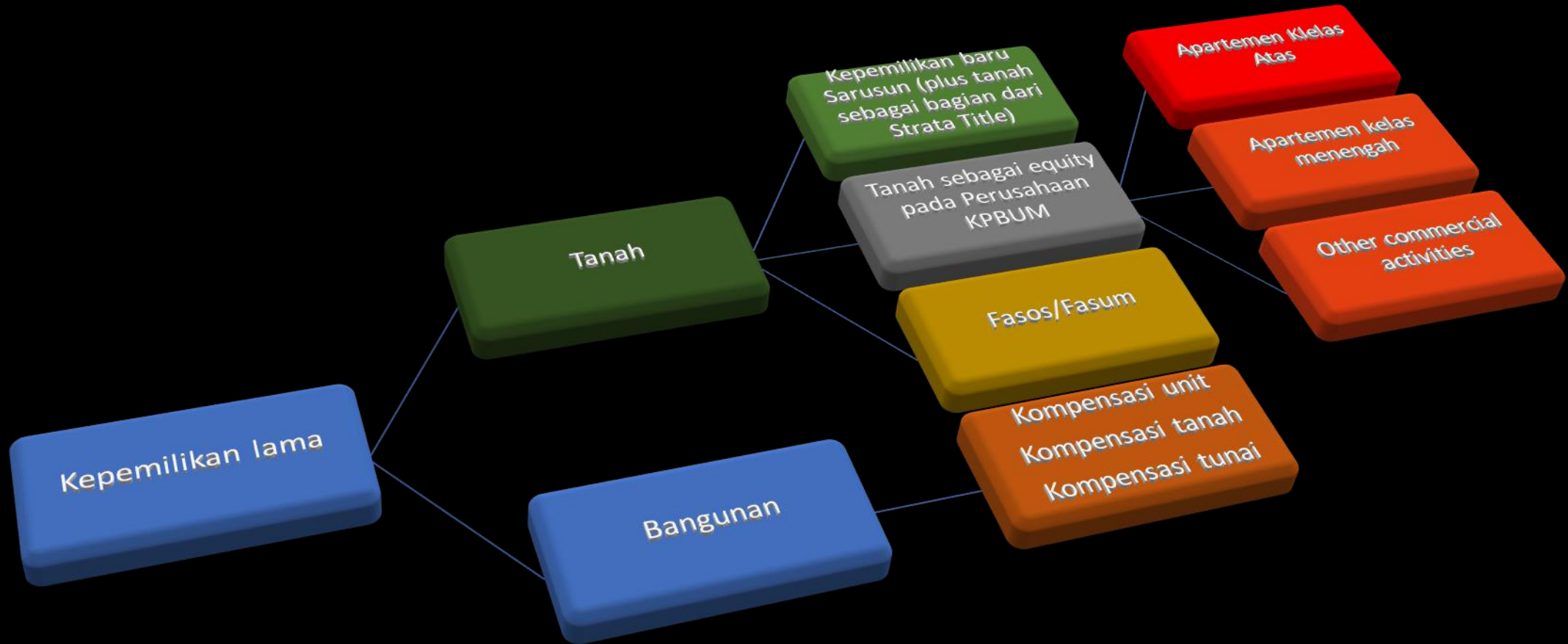
# Konsep UDEVELOP



**Catatan**  
Dalam konsep Penta helix , PT dan Jurnalis/NGO akan menjadi tambahan stakeholder KPBUM  
Dalam kasus ini PT bisa berfungsi sebagai katalisator dan jurnalis/NGO sebagai information source/watchdog



# Konsep UDEVELOP





# Konsep Kompensasi

Pengecekan **status** dan **luasan** masing-masing **bidang tanah** serta **luas** dan **nilai bangunan** di kawasan delineasi

Perhitungan **kompensasi bidang tanah**

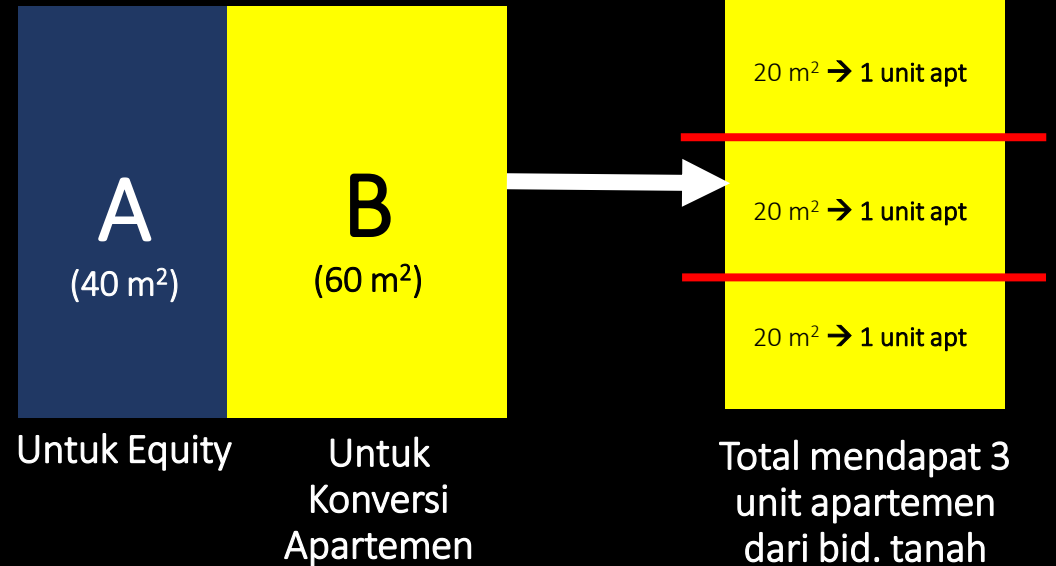
Perhitungan **kompensasi bangunan**

Masyarakat memperoleh kompensasi dalam bentuk:

- **Unit apartemen** (milik, sewa milik, atau sewa);
- **Subsidi apartemen oleh pemerintah**;
- **Equity komersial**; dan/atau
- **Uang tunai**

Contoh Kasus:

Bidang Tanah Milik Z  
Luas = 100 m<sup>2</sup>

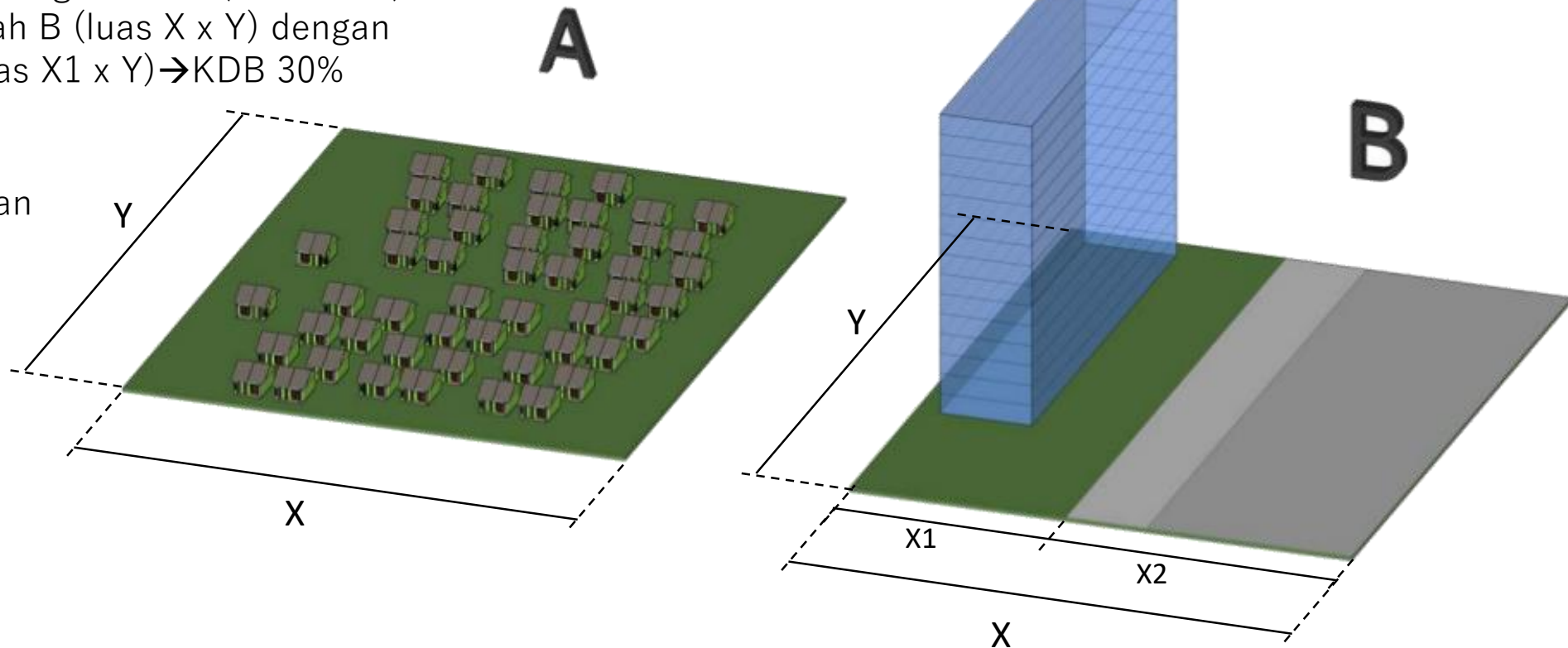


Keterangan

- **Minimal luas kompensasi:** Minimal luas bidang tanah (m<sup>2</sup>) yang dapat dikonversi menjadi 1 unit apartemen milik
- Kompensasi pada tahap 4 tidak harus diperoleh setelah tahap 3 selesai, apabila memenuhi syarat, kompensasi bisa langsung diperoleh

# Konsolidasi Tanah Vertikal (KTV) (1)

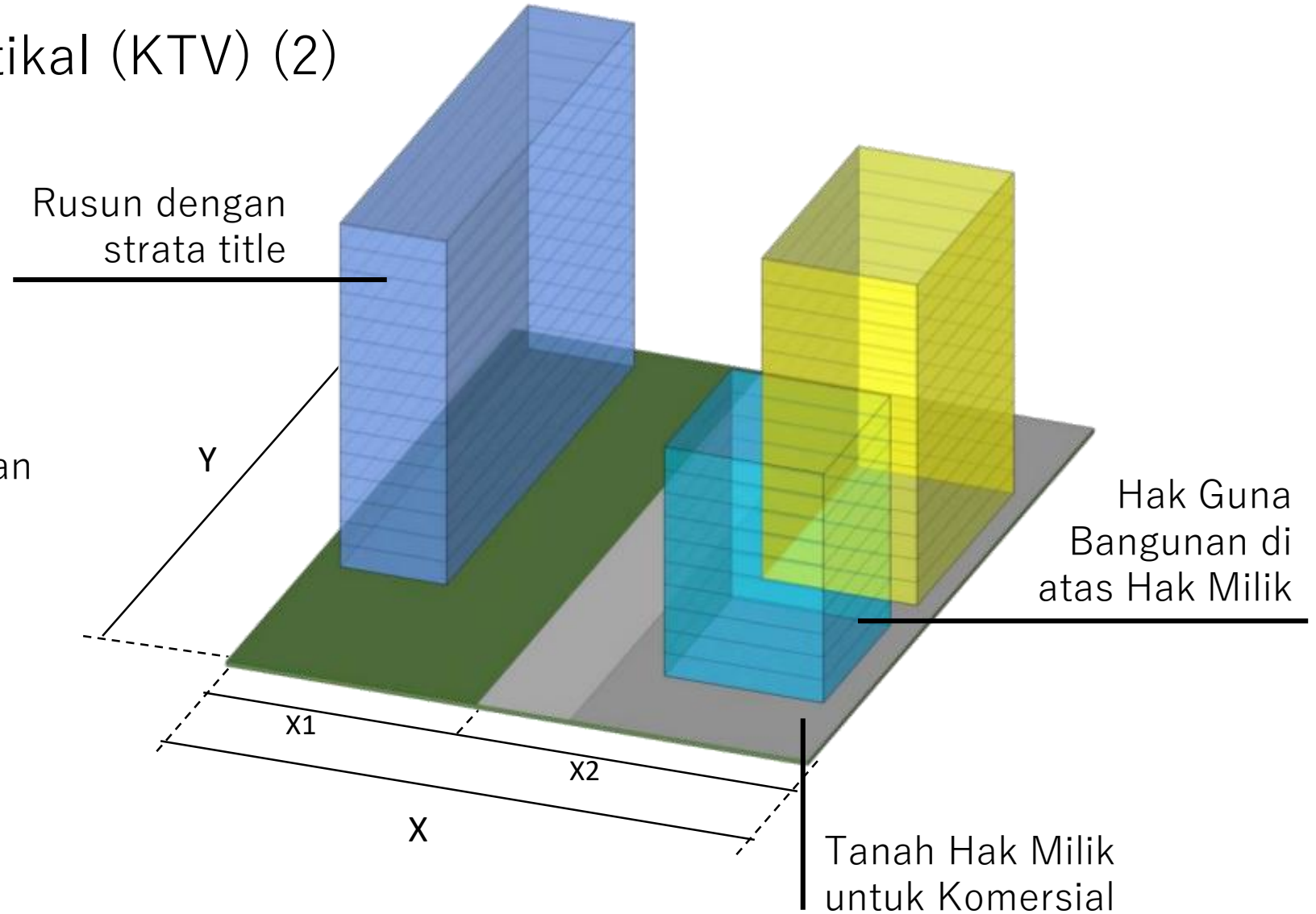
- Konsep dasar → Bidang tanah
- Rumah-rumah kumuh di bidang tanah A (luas  $X \times Y$ ) dipindahkan ke bidang tanah B (luas  $X \times Y$ ) dengan menghuni rumah susun (luas  $X_1 \times Y$ ) → KDB 30%
- Tanah sisa ( $X_2$ )  $\times Y$  adalah tanah TUBP, yang digunakan untuk equity



- $X_1 \times Y$  besarnya adalah  $100/30 \times$  luas lantai dasar Rusun (kalau KDB 30%)

## Konsolidasi Tanah Vertikal (KTV) (2)

- Tanah untuk equity dibedakan dengan tanah untuk rumah milik





## Feature -UDEVELOP

UDEVELOP Proposes Renewal that :

1. Physical Improvement oriented
2. Using Commercial Funds
3. Motivates Community Participation to rebuild “Self reliance”
4. Empowering the community socially and economically- **share holder**
5. Affordable principle
6. Cost recovery principle
7. Replicability principle



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# ● Catatan Penutup

1. Pendekatan socio-capitalism
2. Penyediaan lahan dapat dilakukan oleh pemerintah, swasta dan Masyarakat
3. Zona Perumahan bagi MBR (zona khusus) perlu dilakukan sejak awal
4. Pembangunan dengan skema KPBU/KPBUM
5. Pembangunan harus tanpa menggusur-mengikutsertakan masyarakat pemelilik tanag sebagai share holder
6. Memerlukan regulasi pendukung



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