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July 2020

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Connectivity, People and Place

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Contributors
Kevin Evans, Eugene Sebastian, Marlene Millott, Hasnawati Saleh, Tim Fitzgerald.

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Jesse Kartomi Thomas

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INTRODUCTION

When Joko "Jokowi" Widodo became president of Indonesia in 2014, one of his boldest policy moves was to spend big on infrastructure. After decades of under-spending, Indonesia was being left behind with a massive infrastructure gap. In his five-year national plan (2015-2019), he made accelerating infrastructure investment his priority; a priority that is continuing in his second term (2019-2024).

He pledged to build 5,000 kilometres of railways, 2,600 kilometres of roads, 1,000 kilometres of toll roads, 49 dams, 24 seaports, and power plants with a combined capacity of 35,000 megawatts. He identified, for instance, fixing port infrastructure, the shipping industry and maritime tourism as important for improving connectivity. He increased spending on distribution networks and lowered logistics costs to enhance competitiveness. He also committed to spending more than half of the national budget outside Java to address regional inequality.

As an archipelagic nation, Indonesia's challenge is intra-island, inter-island and international connectivity. Connecting port to city to rural to islands is vital for poverty alleviation and for sustainable rural development and urbanisation. By investing in infrastructure that links cities, towns, villages and islands, these new connections will open up new possibilities. The stronger physical linkages between roads, rail, seaports and airports have the potential to improve living conditions, open up access to markets and lift employment opportunities for local communities.

The following three parts: Place, People and Connectivity reflect the Partnership for Australia-Indonesia Research's focus on the province of South Sulawesi.

For the purposes of this report, we have grouped a number of districts into one of six regions on a geographic basis for ease of comparison across the whole province. This provides an easy snapshot of patterns across the province that would be more difficult to follow in a list of the province's 24 districts and cities. As such, the combinations do not reflect any actual administrative, historic or other form of unity within these regions. The only exception is the Makassar megapolitan region that has been identified by the government as part of its major urban development plan.

The below table identifies the clusters of cities and districts, highlighting the dynamics across the province:

		Administrative divisions			
Region	**Cities and districts**	**Area Sq.Km.**	**Sub-districts**	**Urban suburbs**	**Rural villages**
	Sulawesi Selatan	45,765	305	771	2,107
South	Kabupaten Kep. Selayar	904	11	7	81
	Kabupaten Bulukumba	1,155	10	27	109
	Kabupaten Jeneponto	903	11	31	82
	Kabupaten Bantaeng	396	8	21	46
	Kabupaten Sinjai	820	9	13	67
	Total	**4,177**	**49**	**99**	**237**
Makassar Megapolitan	Kabupaten Takalar	567	9	24	76
	Kabupaten Gowa	1,883	18	46	121
	Kota Makassar	176	15	153	0
	Kabupaten Maros	1,619	14	2	80
	Total	**4,245**	**56**	**225**	**277**
West Coast	Kabupaten Pangkajene dan Kepulauan	1,112	13	38	65
	Kabupaten Barru	1,175	7	15	40
	Kota Parepare	99	4	22	0
	Kabupaten Pinrang	1,961	12	39	69
	Total	**4,348**	**36**	**114**	**174**
Central-East	Kabupaten Bone	4,559	27	44	328
	Kabupaten Soppeng	1,359	8	21	49
	Kabupaten Wajo	2,506	14	48	142
	Kabupaten Sidenreng Rappang	1,883	11	38	68
	Kabupaten Enrekang	1,786	12	17	112
	Total	**12,094**	**72**	**168**	**699**
Toraja-land	Kabupaten Tana Toraja	2,054	19	47	112
	Kabupaten Toraja Utara	1,151	21	40	111
	Total	**3,206**	**40**	**87**	**223**
Greater Luwu	Kabupaten Luwu	3,000	21	20	207
	Kabupaten Luwu Timur	6,945	11	3	124
	Kabupaten Luwu Utara	7,503	11	7	166
	Kota Palopo	248	9	48	0
	Total	**17,69**	**52**	**78**	**497**

PLACE

GEOGRAPHY

Sulawesi is an island of which few Australians are aware. Located northeast of Bali, it is the eleventh largest island in the world and the fourth largest in Indonesia after Borneo, Sumatra, and Papua. Sulawesi is as big as the United Kingdom and larger than New Zealand's South Island. Shaped like the letter 'K' or an orchid, Sulawesi is an island of four peninsulas, separated by three gulfs: the Gulf of Tomini between the northern Minahasa and East peninsulas; the Tolo Gulf between the East and Southeast peninsulas and the Bone Gulf between the South and Southeast peninsulas.

South Sulawesi is one of six provinces in Sulawesi. It is the largest province by population (8.85 million) in Sulawesi and in eastern Indonesia and the seventh largest in all of Indonesia.[1]

The land area of South Sulawesi is 46,717.48 square kilometres.[2] The physical geography of the province consists mainly of low lands, that dominate the southern half, and highlands, dominating the northern half.[3] There are also a couple of large mountains to the south. The highest mountain, Mount Latimojong, is 3,455 metres high.[4] The province contains several now dormant or extinct volcanoes that have endowed the region with rich agricultural soil. There are no active volcanoes in South Sulawesi (though there are elsewhere in Sulawesi especially in the northern half and in the province of North Sulawesi). South Sulawesi's rich soil has sustained a significant agricultural sector, supplying a surplus of rice and other important plantation crops such as cocoa and coffee to the rest of the country.[5] The Makassar Strait on the west coast of South Sulawesi is an important sea lane of communication for trade between Australia and East Asia, and an alternative route to the South China Sea. On the province's east coast is the Gulf of Bone on the other side of which lies the Province of Southeast Sulawesi. At the southern tip of South Sulawesi is the Flores Sea and the province's large island regency of Selayar.

Figure 2: Map of Sulawesi Island

[1] Indonesian Bureau of Statistics, 'South Sulawesi Province in Figures', available at: https://sulsel.bps.go.id/publication/2020/04/27/4b655b65f433c8e7e452a45c/provinsi-sulawesi-selatan-dalam-angka-2020.html.

[2] South Sulawesi Provincial Government, available at: https://sulselprov.go.id/pages/profil_provinsi.

[3] Druce, Stephen C., The Lands West of the Lakes: A History of the Ajattappareng Kingdoms of South Sulawesi 1200 to 1600 CE, KITLV Press: Leiden, 2009, p 21.

[4] Ibid.

[5] Rahim Darma, Musliar Kasim, A. Nixia Tenriawaru and Letty Fudjaja, 'Rice industry and SMEs development in South Sulawesi', Research Journal of Applied Sciences, 13 (1), 2018, pp. 16-82.

HISTORY

The history of South Sulawesi is long and rich, as the area has been a significant location for culture, politics and trade for thousands of years. The human history of South Sulawesi can be traced back 40,000 years, with art from the ice age found in caves around the Maros and Pangkep limestone karst system.[6] These paintings are thought to represent the beginning of modern religious culture, depicting part-animal and part-human figures.

From the earliest periods of history, South Sulawesi was divided into political and territorial areas. The borders of the seven main kingdoms of Luwuq, Soppéng, Sidénréng, Boné, Wajoq, Goa and Talloq shifted across the centuries as they competed for power and authority.[7] Most modern regency (or kabupaten) names and boundaries are based on the territories of these kingdoms, or formed through the amalgamation of former kingdoms.[8]

At the height of the spice trade in the fifteenth and sixteenth centuries, the area of South Sulawesi served as a key trading centre and the gateway to the Maluku Islands, or the Moluccas, to its east. Nutmeg, mace and cloves were a major global commodity, attracting the Portuguese in 1510, then later the Spanish, English and the Dutch each of whom competed for profits and control of this valuable spice trade.[9]

Trade between the Makassan people of South Sulawesi and the many Aboriginal communities of northern Australia was commonplace prior to any European trade in Australia. Makassan seafarers exchanged commodities such as rice, calico, knives, axes, fishing hooks and other metal products for sea cucumber, pearl shell, beeswax and ironbark timber. What was caught and processed in northern Australia created commercial links for South Sulawesi that eventually reached through to China, forming part of a regional trade network with the province as its centre.[10]

Figure 3: Trade between Makassar and East Arnhem Land

[5]Rahim Darma, Musliar Kasim, A. Nixia Tenriawaru and Letty Fudjaja, 'Rice industry and SMEs development in South Sulawesi', Research Journal of Applied Sciences, 13 (1), 2018, pp. 16-82.

[6]Brumm, Adam; Octaviana, Adhi and Aubert, Maxime, 'Indonesian Cave Paintings Show the Dawn of Imaginative Art and Human Spiritual Belief', The Conversation, published 12 December 2019, available at: https://theconversation.com/indonesian-cave-paintings-show-the-dawn-of-imaginative-art-and-human-spiritual-belief-128457; Aubert, M., Brumm, A., Ramli, M., Sutikna, T., Saptomo, E.W., 'Pleistocene Cave Art From Sulawesi, Indonesia', Nature, Vol. 514, Iss. 7521, October 2014, pp. 223-7.

[7]Najamuddin, 'Reorganization of Government Structure and Local Officers Shift: Dutch Colonial Bureaucracy against South Sulawesi Region', Journal of Physics: Conference Series, 1028, p. 1.

[8]Druce, Stephen C., 2009, p 13.

[9]Zuhdi, S, 2018, Shipping routes and spice trade in Southeast Sulawesi during the 17th and 18th century, Journal of Maritime Studies and National Integration, 2 (1), pp. 31-44; Hall, Kenneth. Maritime Trade and State Development in Early Southeast Asia, Honolulu: University of Hawaii Press, 1985.

[10]Clark, Marshall and Kay, Sally M., Macassan History and Heritage: Journeys, Encounters and Influences, ANU Press: Canberra, 2013.

In the early 1900s, the Dutch increased their control over Sulawesi. By 1907, the rulers of the local kingdoms were forced to surrender to the Dutch authorities and pledge loyalty to the queen of the Netherlands.[11] Following Japanese occupation during the Second World War, Sulawesi and the rest of Indonesia fought for independence against the Dutch. When the war was won and sovereignty was transferred in 1949, South Sulawesi became part of the Republic of Indonesia.

The first president and 'architect of Indonesian independence' Sukarno united Indonesia for the first time under the five pillars of Pancasila: belief in one god, humanism, nationalism, democracy and social justice.[12] In 1965 General Soeharto wrested power from Sukarno to become the second president of Indonesia and implemented authoritarian rule, which lasted 32 years.

Indonesia emerged as a democracy amidst the fall out of the Asian Financial Crisis of 1997/1998. Ever since the democratic transition began in 1998, intellectual and political leaders from South Sulawesi have played a central role in designing and leading the implementation of the country's new system of democracy, decentralisation and regional autonomy.

Despite these impressive contributions at the national level, South Sulawesi itself still faces significant development challenges.

In terms of per capita income, it is ranked thirteenth, placing it in the middle of Indonesia's provinces. In human development, South Sulawesi is ranked fourteenth nationally. In Indonesia's Happiness Index, it is number 15, and in each of the sub-categories of health and education, it languishes at thirtieth.[13] In the Indonesian Democracy Index, South Sulawesi is towards the bottom, at twenty-sixth.[14]

[11] Najamuddin, p. 2.

[12] Jaquet, Louis GM, 'From Sukarno to Suharto: Indonesia's Road to Normalcy', The Round Table, 61:243, pp. 420-421.

[13] Indonesian Bureau of Statistics,Human Development Index, available at: https://www.bps.go.id/subject/26/indeks-pembangunan-manusia.html#subjekViewTab3.

[14] South Sulawesi Bureau of Statistics, Indonesia Democracy Index, available at: https://sulsel.bps.go.id/publication/2018/03/01/bf5c8813a17771c76a237d47/indeks-demokrasi-indonesia-provinsi-sulawesi-selatan-tahun-2016.

GOVERNMENT AND ELECTIONS

In contemporary Indonesia, leaders from South Sulawesi have occupied variously the positions of president and vice-president for 11 of the country's 21 years of democratic governance, with Vice-President Jusuf Kalla (2014-2019) being the most recent. As the largest province in eastern Indonesia and the seventh largest electorate in the country, South Sulawesi is always an important point of focus in national elections.

Elections for local government leaders

While all legislative elections have tended to take place on the same day every election cycle since 1971, the terms for sub-national leaders vary. In late June 2018 provincial and local elections were held in 13 of the 24 city and regency councils (DPRDs), plus the provincial governorship.[15] Then, on 17 April 2019, all councils and levels of government, national and regional, right across Indonesia went to election:

- the national DPR (Dewan Perwakilan Rakyat – the People's Representative Council)
- the national DPD (Dewan Perwakilan Daerah – Regional Representative Council, or the regions' house at national level)
- a DPRD in every province, city and regency (Dewan Perwakilan Rakyat Daerah – Regional People's Representative Council)

Elected officials were then inaugurated at the start of October 2019. The table in Figure 4 indicates the local government leaders across South Sulawesi who were elected in the 2018 round of local government leader elections.

Figure 4: Local Government Leaders

Administration	Leadership team
Province of South Sulawesi	Governor and Deputy Governor
Kabupaten Jeneponto	Bupati and Deputy Bupati
Kabupaten Bantaeng	Bupati and Deputy Bupati
Kabupaten Sinjai	Bupati and Deputy Bupati
Kota Makassar	Mayor and Deputy Mayor
Kota Parepare	Mayor and Deputy Mayor
Kabupaten Pinrang	Bupati and Deputy Bupati
Kabupaten Bone	Bupati and Deputy Bupati
Kabupaten Sidenreng Rappang	Bupati and Deputy Bupati
Kabupaten Enrekeng	Bupati and Deputy Bupati
Kabupaten Luwu	Bupati and Deputy Bupati
Kota Palopo	Mayor and Deputy Mayor

South Sulawesi's Governor

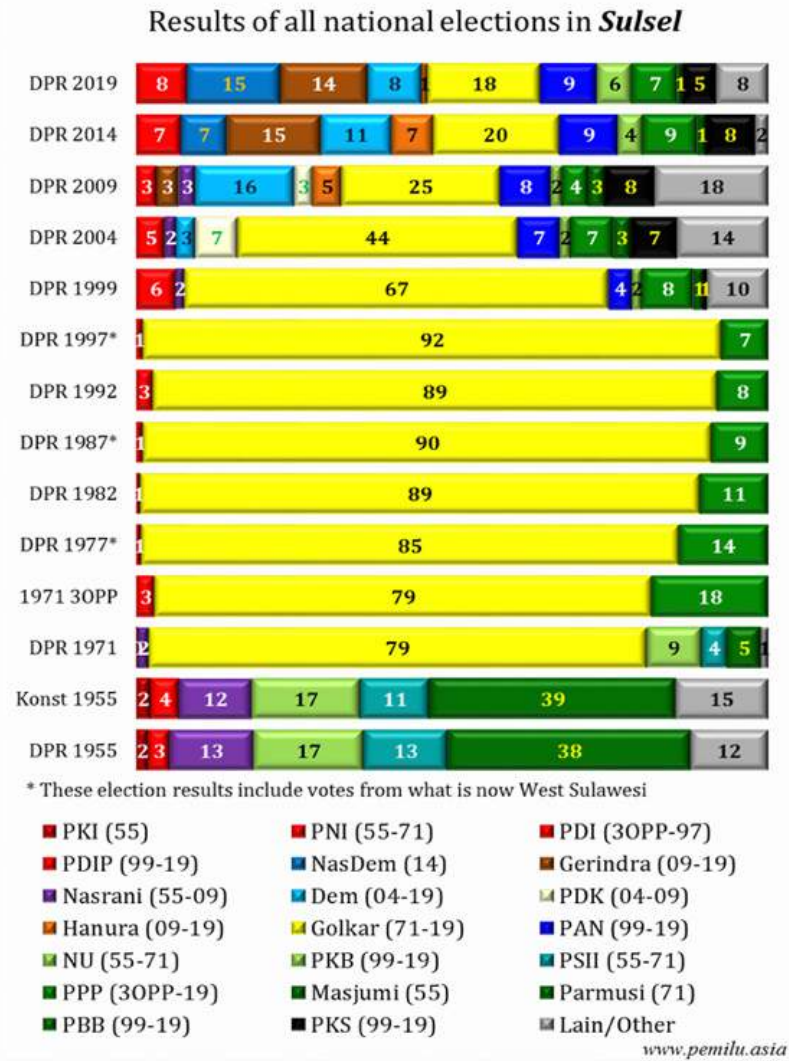
In July 2018, Nurdin Abdullah, aged 56, was elected Governor of South Sulawesi. Nurdin and his deputy Andi Sudirman Sulaiman received 43.8 per cent of the vote.[16] Nurdin, born in Parepare, a port town 155 kilometres north of Makassar, is focused on strengthening the province's status as an agricultural heartland of the nation. Governor Nurdin obtained his doctorate in agricultural science from Kyushu University in Japan in 1994.[17] He is a former professor of agriculture at Universitas Hasanuddin – a founding partner institution of the Australia-Indonesia Centre. Nurdin is also a former bupati (regent) of Bantaeng regency, where he served for two terms and was widely portrayed by the media as a successful leader.

[15] Indonesian Electoral Commission, available at: https://infopemilu.kpu.go.id/pilkada2018/hasil/report/penetapan/list/nasional.
[16] Ibid.
[17] GlobalAsia, 'New political wave sweeps through South Sulawesi', December 2018, available at: https://www.globeasia.com/globeasia-lists/new-political-wave-sweeps-through-south-sulawesi/

Political parties

The first Indonesian national elections were held in September 1955 for Parliament and in December 1955 for the Constituent Assembly.[18] As with most regions off Java, the results of these saw the vast majority of South Sulawesi voters chose parties based on religion, be that Islam or Christianity. Support for non-religious parties was insignificant across the province. The basis for choosing between religious parties was, largely, the prevailing hierarchical social structure that existed between traditional elites and the wider local populace. Throughout the decades of President Soeharto's New Order, South Sulawesi always delivered between 15 and 20 per cent higher levels of support to Golkar (Soeharto's party) than the national average. In terms of the two non-Golkar parties that were able to compete in these elections, it was the Islamist party, PPP, which was by far the largest vote getter in South Sulawesi.[19] The higher-than-average support for Golkar may again have been influenced by the fact that most local social elites lined up behind Golkar bringing with them the wider populace in their areas. Figure 25 provides a picture of the evolution of the South Sulawesi electorate since the first national elections in 1955.

Figure 5: Results of all National Elections in South Sulawesi 1955 – 2019[20]



[18]Pemilu Asia, available at: http://www.pemilu.asia/.
[19]Ibid.
[20]Ibid.

In the democratic era, Golkar has retained its position as the largest party in South Sulawesi in terms of seats won, even securing an outright majority in the transitional elections of 1999. This may be explained by several factors. The economy of South Sulawesi was much less devastated by the Asian Financial Crisis, thus creating much less socio-economic disruption than was felt elsewhere in Indonesia, especially in comparison with urban Java. In fact, the sharp price increase of export commodities such as cacao, cloves and coffee provided 'instant wealth' to many local farmers during the crisis.[21] Additionally, transitional president Habibie (1998-99) comes from South Sulawesi as does the recent two-term vice-president Jusuf Kalla (2004-2009 and 2014-19). Both had been Golkar activists. This, together with the high profile of other South Sulawesi politicians on the national stage at the time, may have helped explain the positive results for this old status quo party.

However, in each election Golkar has continued to lose support as groups have moved in different directions and arguably the traditional patron-client relationships between local social and religious elites and local communities have steadily eroded. As can be seen in subsequent elections after 1999, the electoral dominance of Golkar has begun to fade. Some results from the April 2019 elections (all levels of government) are seen in Figure 6 below. The figure shows a comparison between South Sulawesi's results and the country as a whole (for the national DPR) plus the results for the provincial DPRD and the collective votes in regency DPRDs in our six regency groupings.

At the 2019 elections South Sulawesi voters were choosing the president and vice-president and members of the national DPD and DPR, the provincial DPRD and 24 city and regency DPRDs.

Another feature of the Indonesian electoral and wider political system is a capacity, indeed need, to build cross-party coalitions in order to lead. This is reflected most dramatically in the composition of 'coalitions' of parties that come together to support candidates for president, governor, mayor or regency head.[23] Since the constitutional transformation in 2002, which created a presidential system of government, the essential principles of this system were subsequently applied at sub-national levels also, meaning that since 2005 all governors, regency heads and mayors have been elected by the voters and no longer determined inside the parliaments/councils.

The provincial DPRD is made up of 85 members, representing, in various numbers, cities and regencies across the province. Across the 24 city and regency DPRDs in South Sulawesi, there are 815 seats in total. All MPs, from the national DPR and DPD to the provincial, city and regency DPRDs, are elected on the basis of proportional representation. The table in Figure 4 contrasts the political 'colours' of the national DPR; those of the South Sulawesi DPRD; and the collective strength of each party in our six groupings of cities and regencies across South Sulawesi.

Figure 6: Provincial Electoral Results[22]

Territory	PDIP	NasDem	Perindo	Dem	Gerindra	Hanura	Golkar	PKB	PAN	PPP	PKS	Other
Indonesia (DPR)	19	9	3	8	13	2	12	10	7	5	8	6
SulSel Province (DPRD	8	12	3	9	12	4	14	7	8	7	8	8
South districts	5	9	3	7	13	5	13	8	10	9	8	9
Makassar Mega, districts	6	11	5	10	11	5	11	6	10	9	8	8
West Coast districts	8	16	4	11	9	5	16	8	6	7	3	7
Central East districts	6	12	3	9	10	5	19	6	9	6	7	8
Toraja districts	15	18	8	11	9	7	19	0	0	0	2	10
Luwu Raya districts	7	12	6	9	9	7	16	4	10	8	7	4

[21] Rijerse, Marja, 'Economic Change, the 1997 Crisis and Livelihood Sustainability in Two Horticultural Communities in South Sulawesi', in eds. Titus, Milan J. and Burgers, Paul P.M., Rural Livelihoods Resources and Coping with Crisis in Indonesia, Amsterdam University Press: Amsterdam, 2008, pp. 205-232.

[22] General Election Commission, KPU available at: https://pemilu2019.kpu.go.id/#/ppwp/hitung-suara/.

[23] Pratama Patrya, 'Coalition Building and Our Presidential System', Jakarta Post, 17 April 2014, available at: https://www.thejakartapost.com/news/2014/04/17/coalition-building-and-our-presidential-system.html.

ADMINISTRATION

In terms of public administration, the South Sulawesi province consists of (from higher to lower levels of administration):

- three cities (kota) and 21 regencies (kabupaten)
- 304 sub-districts (kecamatan)
- 3,047 urban suburbs (kelurahan) and rural villages (desa).[24]

Usually, but not always, urban suburbs sit within cities and villages sit within regencies. Read more about these levels of government in this AIC Briefing Note.

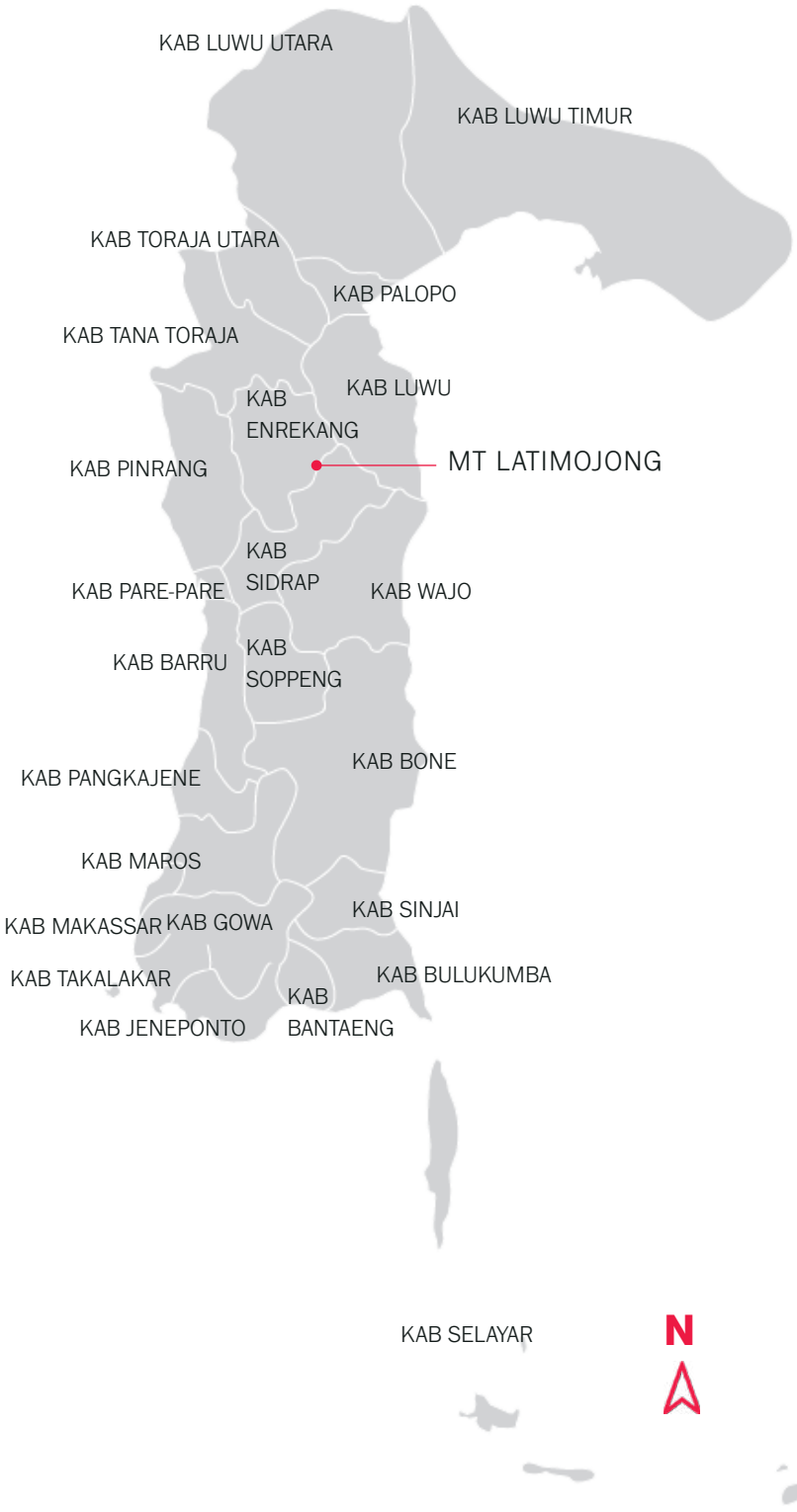
Each city and regency contains a civil administration that consists of many divisions and agencies, or OPD (organisasi perangkat daerah). Each OPD is led by a regional secretary who is responsible to the governor or mayor or bupati (regency head). These offices focus on managing specific or sector-based issues, such as the Office of Agriculture and the Office for Education. In each office are bureau heads that support the regional secretary.

The regional secretary, or sekda (sekretaris daerah), is invariably a career civil servant. Within the local public service there are four broad administrative classes ranging from level one (most senior) to level four (most junior). The spread of staff, and genders, is as follows:

Level 1 - 2% of all staff, of whom 14% are women
Level 2 - 24% (41% women)
Level 3 - 56% (54% women)
Level 4 - 18% (48% women)

Overall 49 per cent of the provincial level civil servants are women but the vast majority of them are concentrated in the lower levels of the public service.[25]

Figure 7: The 24 Cities and Counties of South Sulawesi



[24]South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.
[25]Ibid.

Governor Nurdin Abdullah has established the Governor's Development Acceleration Team (TGUPP). This is a policy promotion unit formed to support the governor in implementing his campaign programs – following a trend by elected leaders of forming such teams. The unit advises and provides analysis on implementing priority policies as well as monitoring and evaluating its progress. The use of a TGUPP in support of an elected governor is also being applied in other provinces, most notably in Jakarta and West Java. In the case of South Sulawesi key leaders of the TGUPP are drawn significantly, but not exclusively from Hasanuddin University.

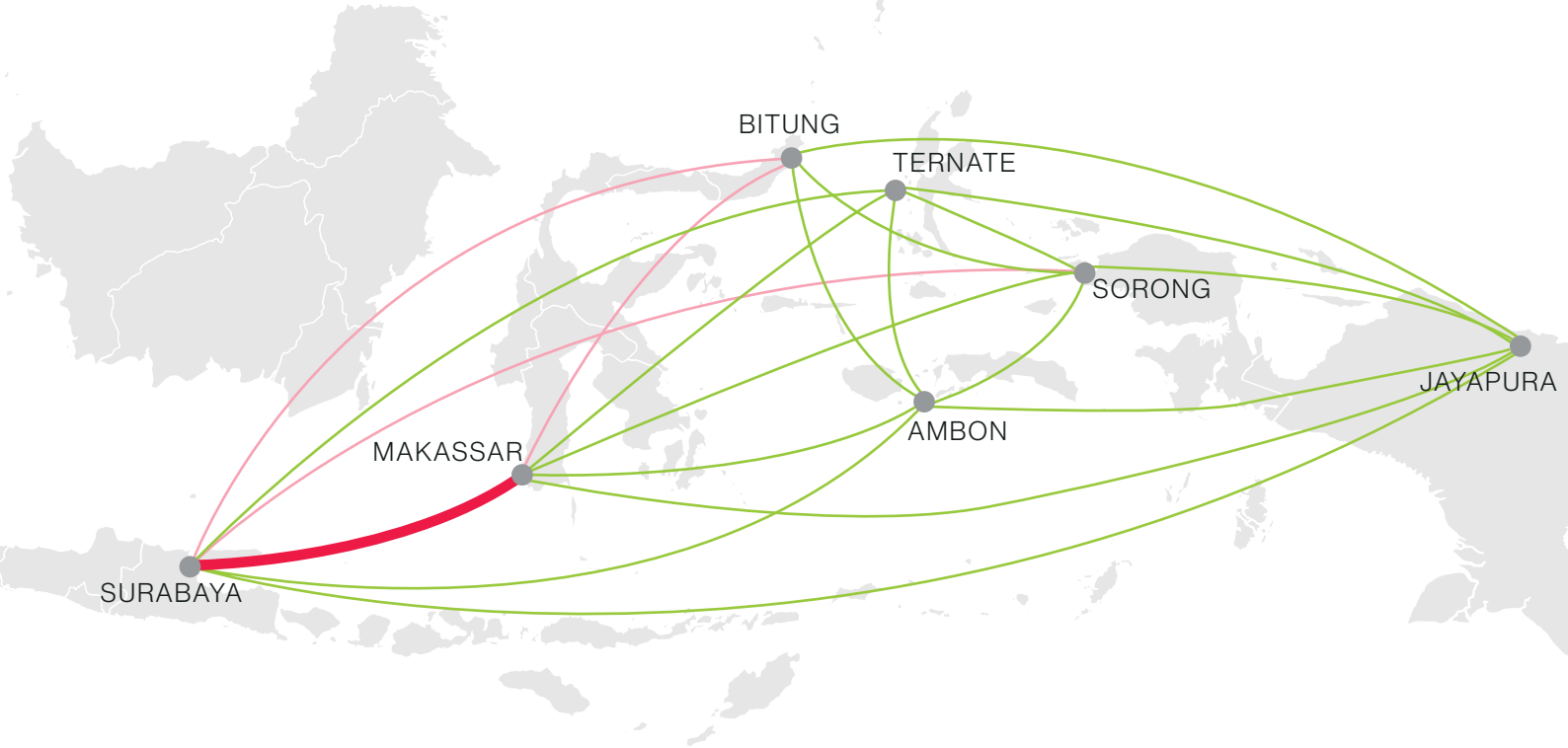
The TGUPP is tasked with coordinating the delivery of the following five priority programs:

- Economic empowerment of the people through downstream value added of South Sulawesi commodities (agriculture, aquaculture, forestry, plantation, and mining)
- Infrastructure construction that increases coverage in remote areas (infrastructure)
- 6 regional hospital and emergency services (healthcare)
- Anti-corruption bureaucracy and comprehensive public education (government, education, and youth development)
- International standard tourist destinations (tourism and ecotourism).[26]

ECONOMY

The economy of South Sulawesi is the largest in eastern Indonesia, ninth-largest in the country, and a major hub for the region. If Surabaya is the centre of connectivity between Java and eastern Indonesia, Makassar is the gate.

Figure 8: Major connectivity hubs for distribution of goods to eastern Indonesia[27]

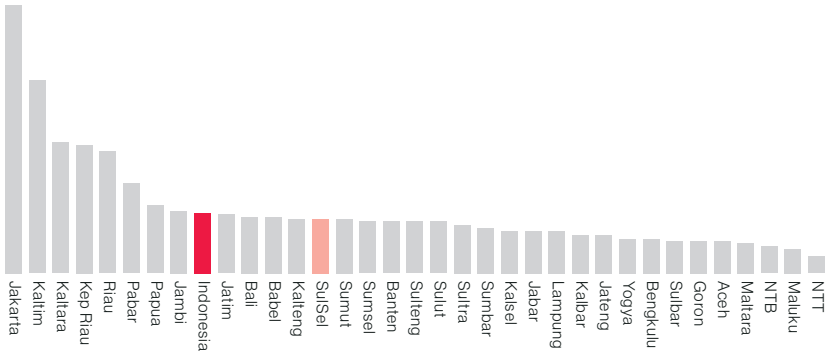


[26]South Sulawesi Provincial Government, available at: https://sulselprov.go.id/welcome/post/gubernur-sulsel-serahkan-sk-tgupp-tahun-2020.

[27]Zaman, M.B., Vanany, I., & Awaluddin, D.K., 2015, Connectivity analysis of port in Eastern Indonesia, Procedia Earth and Planetary Science, 14, pp. 118-127.

The strategic importance of South Sulawesi's economy is bolstered by the size of its population – at 8.85 million it is by far the largest in eastern Indonesia.[28] From the turn of the century to 2019 the province enjoyed average annual rates of economic growth of 6.8 per cent. This was slightly lower than average for the island of Sulawesi as a whole, which was 7.2 per cent per year, but well ahead of the national average which was 5.2 per cent. Indeed the regional economy of Sulawesi has grown faster than any other big island region of Indonesia this century. In some respects this reflects a process of developmental 'catching up' after years of laggard development.[29]

Figure 9: Per capita incomes across Indonesia[30]



At the end of 2019, South Sulawesi's gross regional product was 505 trillion rupiah (approximately AUD 50 billion), representing 3.1 per cent of the Indonesian economy – compared to 2.3 per cent ten years ago. Its economic expansion reflects its much-faster-than-average growth when compared nationally. In 2019, provisional data indicated that South Sulawesi's economy expanded by 6.9 per cent, while national growth was 5.0 per cent. Its high level of growth is largely due to solid performances in several industries, with fisheries, food and beverage and basic minerals refining the key areas of the primary and secondary sectors to enjoy solid and sustained rates of growth.[31]

The provincial administration has the ninth-largest of all provincial budgets, and collectively, the cities and regencies of South Sulawesi have the fifth largest total local government budget.[32] The impressive economic performance has seen South Sulawesi's per capita income rise to be the ninth highest in Indonesia in 2019, up from fourteenth in 2015.[33] In other measurements of development South Sulawesi still faces certain challenges. The agricultural sector, ever vulnerable to the vagaries of weather and global commodity prices, remains significant at 21.3 per cent of the economy (versus only 12.7 per cent nationally). Meanwhile the manufacturing sector is underdeveloped at 13.2 per cent of the economy (versus 19.7 per cent nationally). In addition, levels of domestic investment the province rank sixteenth out of 34 provinces while for foreign investment it sits even lower at eighteenth.[34] This is low for such a significant province.

[28]Indonesian Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.
[29]Ibid.
[30]Ibid.
[31]Ibid.
[32]Ibid.
[33]Indonesian Bureau of Statistics, 'Statistik Indonesia: Statistical Yearbook of Indonesia 2020', available at: https://www.bps.go.id/publication/2020/04/29/e9011b3155d45d70823c141f/statistik-indonesia-2020.html.
[34]Indonesian Bureau of Statistics, 'South Sulawesi Province in Figures'; Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

Foreign and domestic investment

In the three years to the end of 2019, levels of investment in South Sulawesi reached AUD 3.38 billion. This included AUD 1.6 billion in realised foreign investment and AUD 1.1 billion in realised domestic investment. Domestic investment comprised 32 per cent of the total.

Investment is largely in minerals and mining, with the province's non-metallic mineral industry attracting 25 per cent of foreign and domestic investment. Mining is not far behind with 23 per cent. Electricity, gas and water attracts 16 per cent and food processing 12 per cent.[35]

Exports

South Sulawesi total exports to the world were valued at USD 1.21 billion (AUD 1.85 billion) in 2019. Its major export is nickel, valued at USD 784 million (AUD 1.2 billion) of total exports, with the biggest export destination being Japan.[36]

Other top export commodities include seed oils (USD 109 million/AUD 167 million); salt, sulphur and lime (USD 61/AUD 93.5 million); and lak, gum and damar (USD 53 million/AUD 81 million).[37] (See Figure 10.)

Figure 10: Progress of South Sulawesi export value[38]

Export product	FOB value (USD millions)				
	2015	2016	2017	2018	2019
Nickel	790	584	629	777	784
Seed oils	107	85	98	115	109
Salt, sulphur and lime	15	18	32	55	61
Fish and shrimp	82	109	69	37	31
Lak, gum and damar	11	10	8	31	53
Wood and wood products	37	20	32	28	10
Cocoa and chocolate	199	160	53	37	28
Coffee, tea and spices	21	18	5	9	8
Residual animal products	17	19	16	19	21
Total exports of South Sulawesi	1409	1155	1021	1165	1214
Total Indonesian exports	150,366	145,186	168,729	180,013	167,497
Sulsel as % national exports	0.9	0.8	0.6	0.6	0.7

Source: BPS: Statistik Indonesia 2020 and BPS Sulsel: Provinsi Sulsel Dalam Angka 2020

In 2019 South Sulawesi's major export destination was Japan (USD 809 million/AUD 1.2 billion) and China (USD 261/AUD 373 million). Australia is the third largest export market (USD 29 million/AUD 41 million) with Malaysia and South Korea rounding up the top five.

Figure 11: South Sulawesi export destination country[39]

Destination country	FOB value (Million US $)				
	2015	2016	2017	2018	2019
Japan	844	630	666	810	809
China	124	108	123	177	261
Australia	8	10	11	26	29
Malaysia	123	102	45	23	26
South Korea	23	20	17	18	18
Philippines	30	9	9	28	16
USA	106	119	72	28	9
Vietnam	17	29	25	20	12
Total Sulsel exports	1,409	1,155	1,021	1,021	1,214
Total Indon exports	150,366	145,186	168,729	180,013	167,497
Sulsel as % national exports	0.9	0.8	0.6	0.6	0.7

Source: BPS: Statistik Indonesia 2020 and BPS Sulsel: Provinsi Sulsel Dalam Angka 2020

[35] Ibid.
[36] Ibid.
[37] Ibid.

Commodities

South Sulawesi's high level of growth is largely due to solid performance in its agricultural commodities, mining and quarrying sector and many ongoing infrastructure projects. Three broad sectors primarily drive South Sulawesi's strong economic performance: agriculture, forestry and fisheries; mining and quarrying; logistics and infrastructure.

The agriculture, forestry, and fisheries sectors account for 21.3 per cent of the provincial economy.[38] Rice is one of the major commodities – with South Sulawesi the nation's fourth largest production centre after the three larger provinces in Java. Rice is not only marketed across eastern Indonesia but also to the western parts of Indonesia, including Java – the nation's largest rice producer and consumer.[39] In 2019, the province, according to the Ministry of Agriculture, contributed 9.3 per cent (5.0 million tonnes) of the national rice crop.

Coffee and cocoa are other export crops. Indonesia is the world's fourth biggest coffee producer, with South Sulawesi as the seventh largest producer nationally. Indonesia is the world's third largest cocoa producer, with South Sulawesi producing 15 per cent of national production. South Sulawesi has the third largest beef cattle herd in the country, after East Java and Central Java. In 2019, the province had 1.4 million head – about 8 per cent of the total national herd. Seaweed is a fast-growing commodity and a potential major export earner for South Sulawesi. According to the World Bank, Indonesia is the second largest seaweed producer in the world, producing around 25 per cent of the global total.[40]

The mining and quarrying sector is another key driver to South Sulawesi's economic performance, contributing 4.6 per cent of the provincial economy in 2019. Metals and quarrying contributed most of that, or 4.1 per cent of the provincial economy. Quarrying for cement production is an important component of quarrying activity. The Pangkajene and Kepulauan (Pangkep) Regency – along the Makassar-Parepare railway line – has cement production facilities that make up 50 per cent of the regency's economy. There is also an abundant reserve of nickel and cobalt in Sulawesi to produce lithium-ion batteries used to power up devices and support Indonesia's aspiration to become an electric vehicle hub for Asia and beyond – with production planned for 2022.[41]

Infrastructure is the third influential driver. Infrastructure in South Sulawesi is expanding and will have a transformational impact on the province, advancing its role as the hub for eastern Indonesia. Most of the designated 'nationally strategic' development projects in eastern Indonesia are concentrated in South Sulawesi. There are 27 major projects earmarked, compared to just 13 each for the provinces of Papua and Maluku.[42] South Sulawesi's major projects include:

- a new Makassar port that the central government is investing in, which will serve as a major seaport in eastern Indonesia,
- Indonesia's first wind power plants were built in 2018 in Jeneponto and Sidenreng Rappang (Sidrap),
- construction of three large dams in Paselloreng, Karalloe, and Pamukkulu regencies,[43]
- a new railway line connecting the port towns of Makassar and Parepare is underway, which is detailed further in the Connectivity chapter at page 32.

Learn more about South Sulawesi's Economy.

[38]Fedina S. Sundaryani, 'Pay attention to South Sulawesi agricultural sector: Jokowi', The Jakarta Post, May 3 2017, available at: https://www.thejakartapost.com/news/2017/05/03/pay-attention-to-south-sulawesi-agriculture-sector-jokowi.html.

[39]Rahim Darma, Musliar Kasim, A. Nixia Tenriawaru and Letty Fudjaja, 2018, pp. 16-82.

[40]World Bank Group, 'Seaweed Aquaculture for Food Security, Income Generation and Environmental Health in Tropical Developing Countries', World Bank Group, Washington, 2016.

[41]Silviana, Cindy and Suroyo, Gayatri, 'Indonesian plans incentives to boost electric vehicle industry', Reuters, 1 August 2019, available at: https://www.reuters.com/article/us-indonesia-electric/indonesia-plans-incentives-to-boost-electric-vehicle-industry-idUSKCN1UR4FE.

[42]Emilianus Yakob Sese Tolo, 2019, 'Weighing Jokowi's infrastructure projects in Eastern Indonesia', New Mandala, 28 March, available at: https://www.newmandala.org/weighing-jokowis-infrastructure-projects-in-eastern-indonesia/.

[43]Hajramurni, Andi, 'Jokowi inaugurates first Indonesian wind farm in Sulawesi', Jakarta Post, 2 July 2018, available at: https://www.thejakartapost.com/news/2018/07/02/jokowi-inaugurates-first-indonesian-wind-farm-in-sulawesi.html.

PEOPLE

POPULATION

The population of South Sulawesi in 2019 was 8.85 million.[1] The following chart shows the population distribution across our six geographic regions. South Sulawesi's annual rate of population growth from 2010 to 2019 was 1.05 per cent.[2] This was the slowest rate of growth in all of eastern Indonesia and the fourth slowest in all of Indonesia. Lower rates of growth were achieved only in Central Java, Jakarta and East Java with the national average for the same period being 1.31 per cent.[3] The Indonesian Bureau of Statistics projects a continued decline of population growth across South Sulawesi during the 10 years to 2025, falling to 0.68 per cent growth per year.[4] During these 10 years (2015-2025), South Sulawesi's population is expected to grow by 691,000. The table below outlines the projected growth of population by region over this 10 years, based upon the results from the Between Census Population Survey (SUPAS) conducted most recently in 2015.

The overall population density is 189 people per square kilometre, higher than Indonesia's average of 140 people.[6] Across the province population density varies considerably, from 687 people per square kilometre in Makassar megapolitan, to 318 in the South and 236 in the West Coast. The less dense regions are Torajaland with 144 and Greater Luwu at 65 people per square kilometre.[7] Australia, by comparison has three people per square kilometre, and Victoria is the most dense state with 27.[8]

Figure 12: Predicted population growth by 2025[5]

	Population in:		Increase	
Region	2015	2025	Persons	Percent
South	1.317.747	1.381.474	63.727	4,8
Megapolitan	2.798.502	3.110.735	312.233	11,2
West Coast	1.000.428	1.066.434	66.006	6,6
Central East	1.852.052	1.933.129	81.076	4,4
Torajaland	454.561	489.578	35.017	7,7
Greater Luwu	1.097.547	1.230.708	133.161	12,1
South Sulawesi	8.520.838	9.212.058	691.220	8,1

[1]South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020', available at: https://sulsel.bps.go.id/.

[2]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020', available at: https://www.bps.go.id/publication/2020/04/29/e9011b3155d45d70823c141f/statistik-indonesia-2020.html.

[3]Ibid.

[4]Inter-Census Population Survey 2015 (SUPAS), available at: https://www.bps.go.id/publication/2016/11/30/63daa471092bb2cb7c1fada6/profil-penduduk-indonesia-hasil-supas-2015.html

[5]Ibid.

[6]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

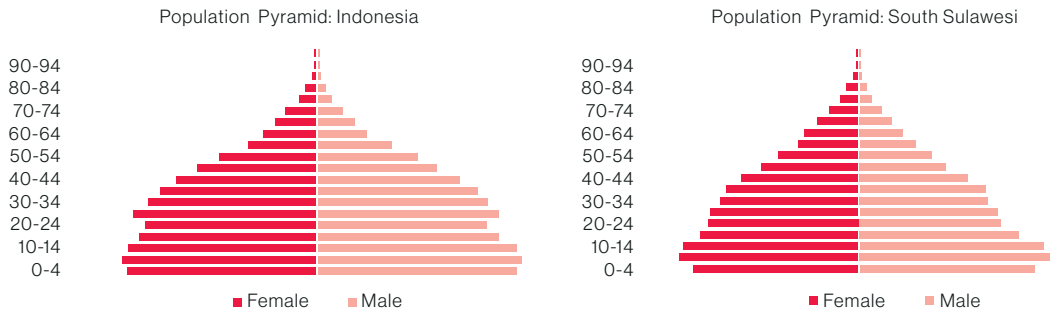
[7]South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.

[8]Australian Bureau of Statistics, 'Regional Population Growth', Australia, 2016-17.

DEMOGRAPHICS

Like Indonesia, South Sulawesi will enjoy a demographic dividend of a working-aged population over the next decade. The demographic profile of South Sulawesi indicates that its demographic bonus will last a decade longer than Indonesia's overall. These population pyramids for Indonesia (on the left) and for South Sulawesi (on the right) are based on the latest census in 2010, which provides the greatest level of detail in age and location breakdowns available.

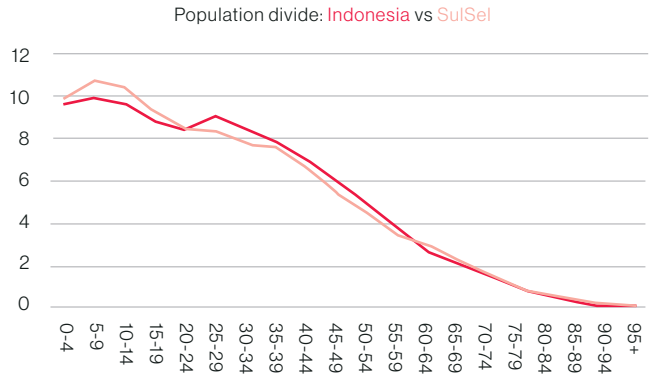
Figure 13: Population Pyramid for Indonesia and South Sulawesi[9]



Both figures demonstrate a steady decline in the relative size of the cohorts as age increases, as is to be expected in regions where there is a deceleration of population growth. In Indonesia overall and in South Sulawesi, the percentage of people aged 0 to 4 years is less than those aged between 5 and 9, suggesting a slowing population growth. There is in fact, a sharp dip in the 0 to 4 age group in South Sulawesi. As this data is from the 2010 Census, this cohort is now entering adolescence.

Another way to look at the population pyramid is to identify the percentage of the total population at each age cohort using a line graph. This allows for easier comparison across population groups. The following graphs use Census 2010 data to attempt such comparisons. When we take the population data and combine it, we find some interesting insights.

Figure 14: Population divide: Indonesia vs South Sulawesi[10]



As can be seen in the figure above, Indonesia, overall is slightly flatter. That is, the peak percentage for any age cohort is lower than for South Sulawesi. In South Sulawesi there appears to be slower commencement of deceleration of population growth than is seen for Indonesia as a whole, as evidenced by the higher percentage of South Sulawesi's population that is under 15 years of age.

[9] Indonesian Bureau of Statistics, 2010 Population Census and Indonesia Population Projection 2010–2035.
[10] Ibid.

Figure 15: Population divide: South Sulawesi vs Regions[11]

The general dynamics of the population 'bulges' and other deviations from the provincial average can be explained by the bulge in the early-20s cohort in the Megapolitan region. This reflects a higher-than-average population of tertiary age students in the Makassar region.

The division by age cohort across the West Coast, while close to the provincial average, has a slight deviation towards children and a slightly lower percentage of young adults than the province overall. The situation in Torajaland and Greater Luwu, reflects a younger than average population and the relatively high rate of population growth in these parts, especially in Greater Luwu (about 59 per cent faster growth than the provincial average). In the case of Torajaland the large cohort of the very young is balanced by what appears to be a high rate of exit migration by those in their early 20s, thus producing a population growth rate that is actually slightly below average for South Sulawesi. Finally, in the rural heartlands of the Central East, there is an older than average age population.[12]

[11]Ibid.

[12]Ibid.

[13]Indonesian Bureau of Statistics, 'Citizenry, Ethnicity, Religion dan and Everyday Language of the Indonesian Population', Indonesian Census 2010, available at: https://www.bps.go.id/publication/2012/05/23/55eca38b7fe0830834605b35/kewarganegaraan-suku-bangsa-agama-dan-bahasa-sehari-hari-penduduk-indonesia.

[14]Ibid.

RELIGIOUS DIVERSITY

In terms of religious communities in South Sulawesi, the clear majority of the population are Muslim (89.6 per cent).[13] This is slightly higher than the national average of 87.2 per cent.[14] As elsewhere across Indonesia, Islam in South Sulawesi consists of a rich mix of interpretations and applications of religio-cultural aspects in daily life. Specific data on the denomination of Islam applied by different Muslim communities in the province is not available, but almost all South Sulawesi Muslims (as elsewhere in Indonesia) would consider themselves followers of the Syafei School of Sunni Islamic thought. Of minority faiths, the largest is Protestantism at 7.6 per cent, slightly more than the national percentage of 7.0 per cent.[15] Catholics make up 1.6 per cent of South Sulawesi's population; somewhat less than the national figure of 2.9 per cent.[16]

Figure 16: Religious diversity in South Sulawesi

Territory	Islam	Protestant	Catholic	Hindu	Other*
Indonesia	87.2	7.0	2.9	1.7	1.3
Sulawesi Selatan	89.6	7.6	1.5	0.7	0.5
South	99.7	0.2	0.0	0.0	0.1
Makassar Mega.	92.7	4.6	1.6	0.1	1.0
West Coast	97.7	1.3	0.6	0.1	0.4
Central East	97.9	0.3	0.0	1.4	0.3
Torajaland	8.4	75.7	14.0	1.5	0.3
Luwu Raya	82.1	14.0	1.5	2.4	0.1

In Indonesia Protestantism and Catholicism are recognised and treated as two separate religions. Over half of all Protestants and almost half of all Catholics in South Sulawesi live in the Torajaland region. This region is home to only five per cent of all people in South Sulawesi. The overwhelming majority of Protestants and Catholics in the Torajaland region are Torajanese. The following table outlines the religious diversity of South Sulawesi and our regional groupings in comparison to Indonesia as a whole.

Hinduism, which is followed by 1.7 per cent of Indonesians, is only followed by 0.7 per cent of people in South Sulawesi. While most Indonesians presume the nation's Hindu population to be essentially Balinese, in the case of South Sulawesi there is actually a notable indigenous South Sulawesi community of people who define themselves as Hindu. Most of these people now live in Kabupaten Sidenreng Rappang (Sidrap) in the Central East region. They constitute a little under half of all Hindus in the province. Almost all other Hindus in South Sulawesi originate from Bali.

[13] Ibid.
[14] Ibid.
[15] Ibid.
[16] Ibid.

GENDER

Culturally, South Sulawesi acknowledges a variety of gender identities: three sexes (female, male and intersex), four genders (women, men, calabai and calalai), and a fifth meta-gender group, the bissu. In Bugis culture, the dominant ethnic group in South Sulawesi (see Ethnicity below), there are five terms that reference various combinations of sex, gender and sexuality: makkunrai (female women), oroani (male men), calalai (female men), calabai (male women) and bissu (androgynous priests).[17] However, the government only collects data on males and females.

Statistically, South Sulawesi has more females than males in almost all regions; 2010 Census data shows 95 males per 100 females. This is the second lowest figure in Indonesia after West Nusa Tenggara. The figure for Indonesia overall was 101 (males per 100 females).[18]

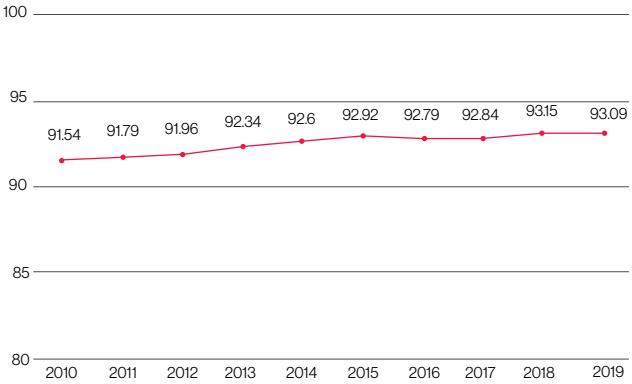
In terms of percentages, females comprise 49.66 per cent of all Indonesians while in South Sulawesi the figure is 51.16 per cent. Females are the majority in four of our six regions across the province, that is: 51.93 per cent in the South, 50.84 per cent in the Makassar Megapolitan, 51.62 per cent in the West Coast and 52.01 per cent in the Central East. Males are only a majority in Torajaland, where females are only 49.25 per cent of the population, and in Greater Luwu where females are 49.86 per cent of the population.

Figure 17: Sex ratio across South Sulawesi regions[19]

Region	Males	Females
South	48.07%	51.93%
Makassar Megapolitan	49.16%	50.84%
West Coast	47.38%	52.62%
Central East	47.99%	52.01%
Torajaland	50.75%	49.25%
Greater Luwu	50.14%	49.86%

In terms of gender equality, the achievement of the Gender Development Index (GDI) in South Sulawesi has seen a steady increase in the last decade, from 91.54 in 2010 to 93.09 in 2019.[20] Below are the figures of South Sulawesi GDI recorded by the Indonesian Bureau of Statistics.[21]

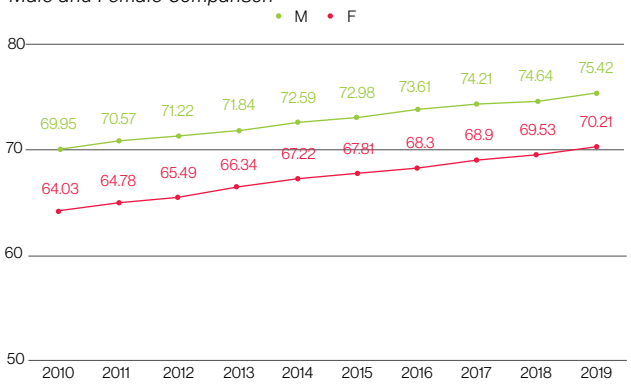
Figure 18: GDI in South Sulawesi 2010-2019[22]



While Indonesia, including South Sulawesi is considered 'high' on the Gender Development Index, according to the United Nations, there are still discrepancies between the conditions of men and women according to the Human Development Index.[23] Read about an example of this in a recent report on gender in fisheries and agriculture industries from the Australia-Indonesia Centre.

[17]Davies, Sharyn,. 'Thinking of Gender in a Holistic Sense: Understandings of Gender in Sulawesi, Indonesia, Advances in Gender Research, Vol 10, 2006, pp. 1-24.
[18]Indonesian Bureau of Statistics, 2010 Population Census.
[19]Ibid.
[20]Indonesian Bureau of Statistics, Gender Development Index, available at: https://sulsel.bps.go.id/statictable/2020/02/28/242/indeks-pembangunan-gender-ipg-2010--2019.html.
[21]South Sulawesi Bureau of Statistics, Gender Development Index 2019, available at: https://sulsel.bps.go.id/statictable/2020/02/28/242/indeks-pembangunan-gender-ipg-2010--2019.html.
[22]Ibid.
[23]United Nations, Gender Development Index, available at: http://hdr.undp.org/en/content/table-4-gender-development-index.

Figure 19: Human Development Index for South Sulawesi Male and Female Comparison[24]



Again there is a steady growth in development for both genders, but the gap between human-development achievements for men and for women remains consistent. In 2019 the HDI of men in South Sulawesi was 75.42, whereas women were at 70.21. This gap is the reason South Sulawesi's Gender Development Index has remained stagnant below 100.

The representation of women in elected positions in the various South Sulawesi legislative bodies from 2014 to 2019 is above the national average. Five of the 24 MPs (20.8 per cent) from the national DPR (Dewan Perwakilan Rakyat – the People's Representative Council) who represent the electorates of South Sulawesi are women.[25] The national figure is 20.3 per cent.[26] The gap is bigger at the provincial level where 21.2 per cent of councillors are women, while the national average at provincial level is 15.9 per cent. At the city and district councils, women comprise 15.0 per cent of all local members.[27] Initial data from the 2019 elections indicates that women will constitute 27 per cent of MPs in the provincial council. This is the third highest figure among the 34 provinces and 10 per cent higher than the average across all provincial councils.[28]

DISABILITY

According to the 2015 Between Census Survey (SUPAS 2015), 10.22 per cent of South Sulawesi's population experiences a form of disability. This is relatively high, compared with the national percentage of 8.56 per cent. In fact, the island of Sulawesi has the highest rates of disability of the whole country, with the exception of the provinces of Southeast Sulawesi and West Sulawesi. South Sulawesi has the fourth highest percentage, while North Sulawesi, Gorontalo and Central Sulawesi make up the top three.[29]

Indeed, for young and middle aged people, South Sulawesi's rates of disability are high compared with other provinces. Of children and young people aged 5 to 17, 5.3 per cent experience a disability – the fourth highest percentage of all 34 provinces – with the national average at 3.3 per cent.[30]

Rates of adults aged 18 to 59 who experience a disability are exceptionally high, at 33.6 per cent, the second highest figure of all provinces and a massive 11.6 per cent higher than the national average at 22 per cent.[31]

This data refers to whether a person experienced a disability in the month prior to being surveyed.

In the older age bracket of 60 and above, South Sulawesi's figures are closer to the national average. Of all people aged 60 and older, 75 per cent are independent, compared to 74.5 per cent nationally. Those who require a small amount of care make up 21.0 per cent of this cohort in South Sulawesi, while 1.0 per cent require a moderate amount, 1.5 per cent continuous care and 2.0 per cent are totally dependent.[32]

[24]South Sulawesi Bureau of Statistics, Human Development Index, available at: https://sulsel.bps.go.id/statictable/2020/02/28/243/indeks-pembangunan-manusia-ipm-menurut-jenis-kelamin-2010--2019.html.

[25]House of Representatives of the Republic of Indonesia, Members of Parliament, available at: http://www.dpr.go.id/en/anggota/.

[26]Gender Quotas Database, Indonesia, available at: https://www.idea.int/data-tools/data/gender-quotas/country-view/142/35.

[27]Centre for Political Study and Research (Puskapol), Universitas Indonesia, available at: https://www.puskapol.ui.ac.id/pemilu-2014-data-perolehan-kursi-dprd-provinsi and https://www.puskapol.ui.ac.id/pemilu-2014-data-perolehan-kursi-dprd-kab-kota.

[28]Based upon data from Puskapol UI (https://www.puskapol.ui.ac.id/data-dprd-provinsi-terpilih-2019) plus a report from Antara: (https://www.antaranews.com/berita/1010684/kpu-jumlah-anggota-dprd-sumbar-perempuan-berkurang)

[29]Indonesian Bureau of Statistics, 'Indonesia's Population Profile Based on SUPAS 2015'.

[30]Indonesian Ministry of Health, 'Disability Infodata: International Day of People with Disabilities 2018', available at: https://www.kemkes.go.id/folder/view/01/structure-publikasi-pusdatin-info-datin.html.

[31]Ibid.

[32]Ibid.

ETHNIC DIVERSITY

The population of South Sulawesi contains a moderate degree of ethnic pluralism. Much of it, as elsewhere in Indonesia, is based around geography. At the provincial level the key groups are, based on Census 2010, as follows:

Figure 20: Ethnic diversity in South Sulawesi[33]

Ethnicity	Percentage of provincial population
Buginese	45.0%
Makassarese	29.7%
Other Sulawesi groups eg. Toraja, Selayar, Minahasa etc.	19.2%
Javanese	2.9%
Mandar (West Sulawesi)	0.7%
Nusa Tenggara (West and East)	0.6%
Sino-Indonesian	0.5%
Moluccan and Papuan	0.4%
Balinese	0.3%

As may be expected, the concentration of ethnic communities varies considerably across our geographic regions.

Figure 21: Ethnic communities across the major cities and sub-districts

Region	South Region	Makassar Mega.	West Coast	Central East	Toraja-land	Greater Luwu	South Sulawesi
Buginese	36.2	24.6	76.7	87.6	0.9	21.6	45.0
Makassarese	51.6	61.0	13.3	0.6	0.5	2.1	29.7
Other Sulawesi	9.9	5.5	4.6	10.6	97.8*	60.4#	19.2
Javanese	0.5	3.5	1.4	0.8	0.4	10.3	2.9
Mandar	0.0	0.7	3.1	0.1	0.0	0.1	0.7
Nusa Tenggara	0.1	1.2	0.1	0.0	0.0	1.3	0.6
Sino-Indonesian	0.1	1.5	0.2	0.1	0.0	0.1	0.5
Bali	0.0	0.1	0.0	0.0	0.0	2.4	0.3
Other	1.6	1.9	0.6	0.2	0.4	1.7	1.1

** Consists mostly of people who identify as Torajanese*
 # Consists mostly of people who consider themselves as Luwu people

The higher than average concentration of Javanese and Balinese people, especially in the Greater Luwu region, is due to an old national government program of sponsored transmigration. In the Luwu Timur district (East Luwu) within the Greater Luwu region the community includes 15.5 per cent Javanese and 6.2 per cent Balinese.[34]

[33]Indonesian Bureau of Statistics, 2010 Population Census.
[34]Ibid.

YOUTH

There are 2.25 million young people aged 16 to 30 in South Sulawesi, making up 25.6 per cent of the population. Of these, females outnumber males, just, making up 50.4 per cent. The majority of these young people live in rural areas (55.3 per cent), though there is a national trend of increasing urbanisation which is also being seen in South Sulawesi.[35]

The biggest group of young people are those aged 16 to 20 years, who account for about 35.2 per cent of all 16 to 30 year olds. These are high school/university ages. The province is home to 226 private and 11 public tertiary institutions, plus a small number of religious based tertiary institutions. In the 19 to 24 age group, less than a quarter (23.0 per cent) are still studying. In general, only one in four young people in South Sulawesi receives any higher education. Just 12.5 per cent of youth have a university level education, which is slightly higher than the national average at 9.7 per cent.[36]

One of the most important challenges in education in South Sulawesi is that a significant number of youth (37 per cent) aged 16 to 18 years are no longer attending school. Under Indonesian law, it is compulsory to attend school from 7 to 15 years old. One of the underlying explanations of school absence is due to early marriage. In South Sulawesi, 4.7 per cent of youth are married before reaching the age of 16. This figure is almost two times higher than the national level. Underage marriage rates are more than 10 times higher for females than males (11.7 times to be exact). Rates are also much higher in rural areas.[37]

In addition, a very small percentage of young people in South Sulawesi (1.2 per cent) have no formal education at all, and have never attended school.

Combined, the proportion of young people who have never been to school or dropout from primary school is two times higher (11.3 per cent) than the national average (5.9 per cent).[38] This contrast provides evidence of the need to focus on ensuring better access to education for all young people in the province.

More than half of young people in South Sulawesi are working (51.5 per cent), while one-fifth attend school (19.6 per cent), and just under a fifth work domestically taking care of their household (18.3 per cent). The figures for working youth are slightly higher in urban areas (54.5 per cent) compared to rural areas (48.1) and significantly more male youth work (in paid jobs) than female youth (64.7 per cent to 38.5 per cent).[39]

Learn more about Youth in South Sulawesi.

[35]South Sulawesi Bureau of Statistics, 'Youth Statistics for South Sulawesi 2018', available at: https://www.bps.go.id/pencarian.html?searching=pemuda&yt1=Cari.
[36]Ibid.
[37]Ibid.
[38]Ibid.
[39]Ibid.

HEALTH AND WELLBEING

Life expectancy

BPS (Indonesia Statistics) data from 2019 shows the life expectancy of the average male in South Sulawesi is 68.5 years compared to females' 72.4 years.[40] In both cases this was slightly lower than the Indonesia-wide figures of 69.5 years for males and 73.3 years for females.[41] The table below shows the average life expectancy of men and women across our six regional groupings:

Figure 22: Life expectancy in South Sulawesi[42]

Region	Age in years
Torajaland	72.7
Greater Luwu	69.2
Makassar Megapolitan	69.1
West Coast	68.3
Central East	68.0
South	67.3

Medical staff and facilities

The availability of medical facilities and staff contributes significantly to quality of health. The South Sulawesi Provincial Statistics Office (BPS Provinsi Sulawesi Selatan) records 2,537 doctors across the province.[43] This represents approximately one doctor for every 3,480 people.

Another important aspect of health services is the availability of midwives at childbirth. Across the province there are 8,747 midwives.[44]

There are also 13,379 nurses in South Sulawesi, and 763 dentists.[45]

These healthcare staff work across 81 general hospitals, 30 specialised hospitals and 158 community health centres with inpatient facilities.[46]

Medical issues

Stunting is a concern in South Sulawesi, as it is experienced by 35.6 per cent of the population, higher than the national figure of 30.8 per cent.[47] In addition to this, 18.3 per cent of the population suffers from central (abdominal) obesity. This data indicates the double burden of nutrition in South Sulawesi, as is also the case in many other provinces.

In regards to maternal health, South Sulawesi is among the provinces with high maternal mortality rates. Family planning programs are government initiatives to manage birth rates and to ensure mothers' health. However, less than half (48.22 per cent) of married female youth in South Sulawesi actively participate in family planning or birth control.[48] Throughout 2017, there were 115 maternal deaths and 817 neonatal deaths.[49] This means approximately two mothers and 16 newborn babies died in South Sulawesi every week in 2017.

Similar to the data at the national level, South Sulawesi is experiencing the triple burden of disease: infectious disease, non-communicable disease and emerging disease. This is a result of several factors, including poor access to sanitation, clean water and nutrition, particularly among the poor in both urban and rural areas. Lifestyle factors such as diet and smoking also contribute.

[40]South Sulawesi Bureau of Statistics, 'Life Expectancy by Gender, 2010-2019', available at: https://sulsel.bps.go.id/statictable/2020/02/28/247/umur-harapan-hidup-uhh-menurut-jenis-kelamin-2010---2019.html.

[41]Indonesian Bureau of Statistics, 'Life Expectancy by Province and Gender 2010-2019', available at: https://www.bps.go.id/dynamictable/2016/01/08/1114/-ipg-angka-harapan-hidup-ahh-menurut-provinsi-dan-jenis-kelamin-2010-2018.html.

[42]South Sulawesi Bureau of Statistics, 'Life Expectancy by Gender, 2010-2019'.

[43]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

[44]Ibid.

[45]Ibid.

[46]Indonesian Ministry of Health, 'Basic Health Research 2018', available at: https://www.litbang.kemkes.go.id/laporan-riset-kesehatan-dasar-riskesdas/.

[47]Body for Health Research and Development South Sulawesi, 'Basic Health Research South Sulawesi 2018', available at: https://www.litbang.kemkes.go.id/laporan-riset-kesehatan-dasar-riskesdas/.

[48]South Sulawesi Health Office, 'Health Office Profile for South Sulawesi 2018', available at: http://dinkes.sulselprov.go.id/opd/index/dinkes.

[49]Ibid.

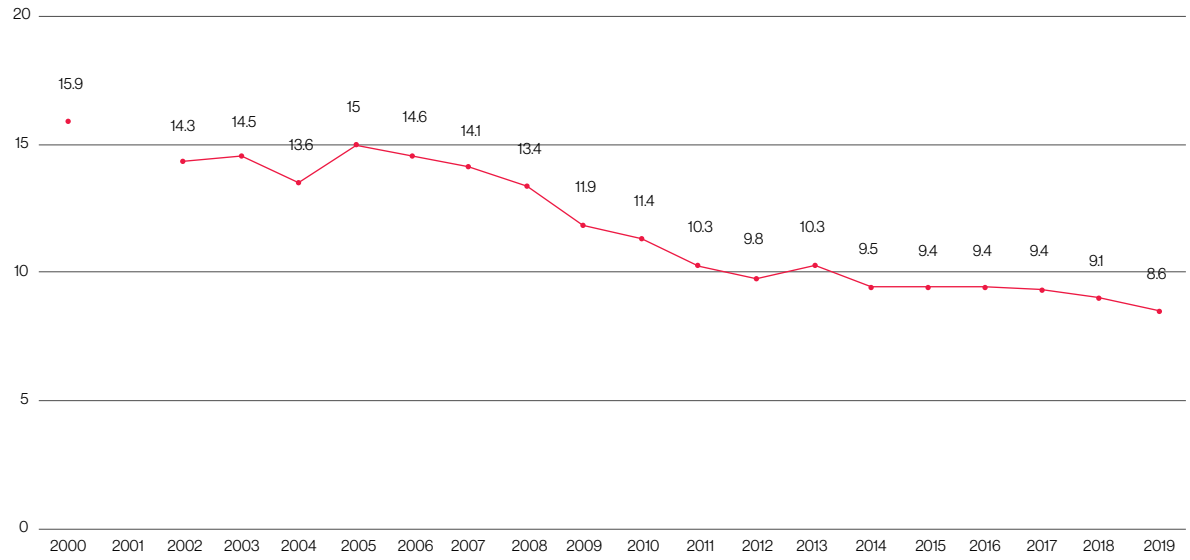
Smoking

Exactly a quarter of people over the age of 15 smoke in South Sulawesi.[50] This is compared with 28.5 per cent of the population nationally.[51] The age group with the highest percentage of smokers is 35 to 44, with 31.4 per cent of that group smoking, closely followed by 25 to 34 year olds at 31.3 per cent.[52]

Poverty

Across South Sulawesi, poverty has been in decline since the start of the century.

Figure 23: Percentage of poverty in South Sulawesi since 2000[53]



Data from the South Sulawesi Provincial Statistics Office indicates that the level of poverty in the province is 8.6 per cent, as measured in September 2019.[54] This was slightly lower than the national average of 9.22 per cent[55] and ranks South Sulawesi in the middle of the pack, with the eighteenth highest poverty rate of the 34 provinces. There is a strong sharp rural-urban divide here, with 4.2 per cent living under the poverty line in urban areas compared to 11.9 per cent in rural areas.[56]

Across our groupings in the province the lowest incidence of poverty is in the Makassar Megapolitan region (7.6 per cent). The next lowest levels of poverty are to be found in the Central East region (8.3 per cent). Incidence of poverty in the West Coast are at 9.1 per cent and the South is at 10.6 per cent. Meanwhile the highest levels of poverty are found in Greater Luwu (10.3 per cent) and Torajaland (12.4 per cent).[57]

The spread of COVID-19 and the economic impact of the pandemic makes it likely that poverty will rise across the country.[58]

[50] South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.

[51] Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

[52] South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.

[53] South Sulawesi Bureau of Statistics, Percentage of Poverty in South Sulawesi, available at: https://sulsel.bps.go.id/dynamictable/2016/01/19/91/persentase-penduduk-miskin-provinsi-sulawesi-selatan-2000-2018-.html.

[54] Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

[55] Ibid.

[56] South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.

[57] Ibid.

[58] Aulia, Fisca Miswari; Maliki; and Asadullah, M. Niaz, 'Without intervention, models show that COVID-19 will drag at least 3.6 million Indonesians into poverty', The Conversation, 15 May 2020, available at: https://theconversation.com/without-intervention-model-shows-covid-19-will-drag-at-least-3-6-million-indonesians-into-poverty-138305.

CONNECTIVITY

TRANSPORT

South Sulawesi's significant investments in transport and connectivity will play an important role in poverty alleviation, sustainable development, and urbanisation. The strong physical linkages of roads, rails, ports and airports stand to improve living conditions, create market access, and lift employment opportunities for rural and marginalised communities. The government believes the investment in connecting cities to towns, villages and islands will have a significant impact and open up new possibilities for all sections of the community.

Road travel

As the public transport network is in development, private vehicles still dominate the local transport system in South Sulawesi. Motorcycles are by far the most popular form of travel, with 3.2 million of them registered in 2018. This means that 36.5 per cent of the population owns a motorcycle. Of these motorcycles, 1.2 million are registered in Makassar. In addition, there are 375,110 cars registered in the province, representing one each for 4.2 per cent of the population.

Figure 23: Vehicles in South Sulawesi 2018[1]

	Number of vehicles
Car	375,110
Bus	24,566
Truck	172,026
Motorcycle	3,225,497
Total	3,797,199

The role of road transportation in connecting the city of Makassar with districts, villages and hinterlands is crucial to the connectivity of the province. The accessibility of the city to people from rural areas depends on roads.[2] The construction of the Trans-Sulawesi Highway has enabled increased connectivity within the province, and also in connecting South Sulawesi to other areas of the island. The highway is a major piece of infrastructure that connects the large cities of Sulawesi, including Makassar in South Sulawesi and Manado in North Sulawesi. It was decades in development and constituted the first effort to connect the regions of Sulawesi by land.

Across South Sulawesi, there are 30,476 kilometres of roads. Of these, 26,715 kilometres, or 87.7 per cent, are managed by cities and regencies, while the remainder are managed at the provincial or national level.[3] Over the decades road development has been unable to keep up with the increase in the number of vehicles using them.[4] While the construction of the highway alleviated this to a degree, the latest available reports from 2015 show that only approximately 42 per cent of roads in the province are in good condition.[5]

Air travel

Sultan Hasanuddin International Airport is located in the Maros Regency, just north of Makassar. It is part of the Angkasa Pura I network that consists of 13 key airports across the eastern half of Indonesia and beyond. Total passenger movements in Indonesia are growing fast. According to Angkasa Pura, in 2016, 90 million passenger flights were taken – 10 times higher than in 1990. Continued growth is expected with total passenger movements in 2036 estimated to reach 355 million.

Hasanuddin Airport has become a key hub in Indonesia, especially in linking the east to the rest of the country. Domestic passenger movements at Hasanuddin Airport increased by 4.9 per cent in 2018 and the airport moved a total of 13.5 million passengers in 2018, despite only having capacity for 7 million.[6] A substantial program of staged expansions is now being rolled out that will raise annual passenger capacity to 40 million per year by 2044.[7]

[1]South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020', available at: https://sulsel.bps.go.id/.

[2]Anwar, Chairul, 'Labour Mobility and the Dynamics of the Construction Industry Labour Market: the case of Makassar, Indonesia', Cuvillier Verlag: Gottingen, 2004.

[3]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020', available at: https://www.bps.go.id/publication/2020/04/29/e9011b3155d45d70823c141f/statistik-indonesia-2020.html.

[4]Chairul, 2004.

[5]South Sulawesi Bureau of Statistics, 'Length of Roads by Regency/City and Road Condition in South Sulawesi, 2015', available at: https://sulsel.bps.go.id/dynamictable/2016/08/09/120/panjang-jalan-menurut-kabupaten-kota-dan-kondisi-jalan-di-provinsi-sulawesi-selatan-km-2015-.html.

[6]Angkasa Pura, 'Appoints Wijaya Karya, Angkasa Pura Airports Begins The Development Of Sultan Hasanuddin International Airport', Angkasa Pura, 20 February 2019, available at: https://ap1.co.id/en/information/news/detail/appoints-wijaya-karya-angkasa-pura-airports-begins-the-development-of-sultan-hasanuddin-international-airport.

[7]Ibid.

Port of Makassar

The central government is constructing a new port in Makassar to the north of the existing port, which will serve as a major seaport in eastern Indonesia. The new port is one of six major ports designated as regional logistics hubs as part of the president's "Sea Toll" initiative.[8] Once open, this port will be the key container terminal for Makassar, while the existing terminal will focus more on passenger services.

The new port will be located relatively close to the southern end of the new train line and not too far from Hasanuddin Airport. New industrial sites are also being planned, including the expansion of a container yard up to 48 hectares by 2022. This container yard will have a yearly capacity of 17.5 million twenty-foot containers, up from 500,000 previously.[9]

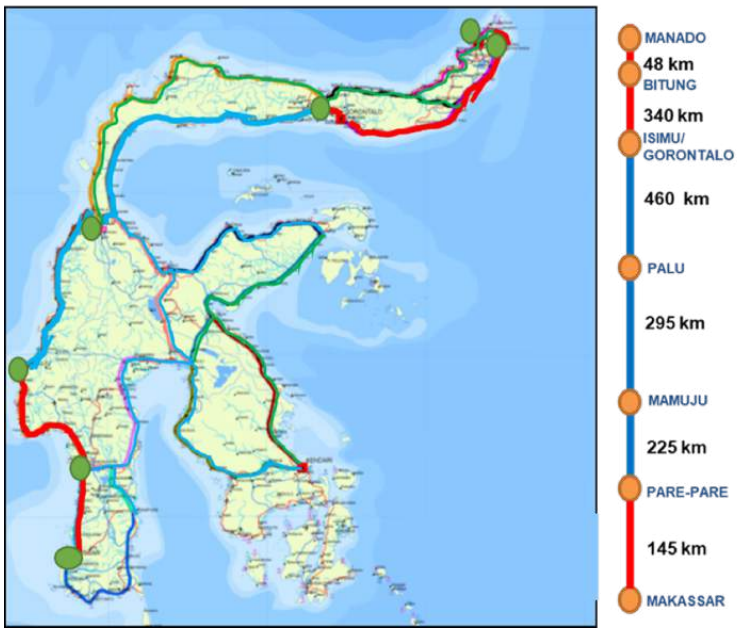
As it undergoes development, segments of the new port are already facilitating a growth in operations. From 2018 to 2019, the port experienced an increase in container traffic from 414 million to 466 million gross tonnes.[10]

Trans-Sulawesi Railway

Train transport is the smallest sub-sector among the five modes of transport in Indonesia, coming in below, in order of importance, road, air, sea and ferry transport. In 2015 rail was only valued Rp.12 trillion (AUD 1.23 billion) or 0.3 per cent of the national economy – down from 0.5 per cent at the turn of the century.[11]

The Trans-Sulawesi Railway is an ambitious project aimed at building a trainline to connect the entire Sulawesi island from Makassar in the south to Manado in the north. Its construction, along with rail projects in Sumatra, Kalimantan and Papua, represent a shift away from the traditional domination by Java as the centre of Indonesian railways. It was first conceived of in 2012, and construction on the first stage of the project, connecting Makassar to the coastal city of Parepare across 144 kilometres of track, began in 2014.[12]

Figure 24: Trans-Sulawesi Railway



The development of this first stage between Makassar and Parepare will connect five cities and regencies: Makassar, Maros, Pangkajene, Barru and Parepare. The route will provide much-needed transport for people and goods, and stands to stimulate local economies, boost production and trade of commodities and transform communities.

[8]Carruthers, Andrew M., 'Developing Indonesia's maritime infrastructure: The view from Makassar', ISEAS Yusof Ishak Institute, Issue 49, 30 August 2016, available at: https://www.iseas.edu.sg/images/pdf/ISEAS_Perspective_2016_49.pdf

[9]PwC, '2022, Makassar New Port to have integrated industry', 22 January 2020, available at: https://www.pwc.com/id/en/media-centre/infrastructure-news/january-2020/2022–makassar-new-port-to-have-integrated-industry.html.

[10]Ibid.

[11]Indonesian Bureau of Statistics, 'Quarterly GDP at Current Prices based on Business Sector, 2014-2020', available at: https://www.bps.go.id/dynamictable/2015/05/06/826/-seri-2010-pdb-triwulanan-atas-dasar-harga-berlaku-menurut-lapangan-usaha-miliar-rupiah-2014-2020.html.

[12]Railway Gazette International, 'Groundbreaking starts Trans-Sulawesi Railway Construction', 15 august 2014, available at: https://www.railwaygazette.com/infrastructure/groundbreaking-starts-trans-sulawesi-railway-construction/39846.article.

Figure 25: Makassar-Parepare Railway through districts

As a national priority project, the Makassar-Parepare link is part of the work of the Committee for the Acceleration of Priority Infrastructure (KPPIP) chaired by the Coordinating Ministry for the Economy. Implementation of the project comes under the Ministry of Transportation, specifically the Directorate General for Rail.[13] The project is being constructed by the work unit (satuan kerja) under the Directorate General's Train Engineering Office of East Java, because there previously hasn't been railway infrastructure in Sulawesi. The work unit is open to receiving funding from the private sector for the first leg of the railway.

There are important benefits for South Sulawesi in the development and operationalisation of the rail project.

The most immediate impact will be felt by those workers and contractors recruited to construct the railway line, rolling stock, stations and other ancillary infrastructure. This will include those engaged in training and preparing the workforce to manage and operate the service once operational.

Once it is operational, communities living close to the stations will be able to make use of the facilities either to move cargo or to transport themselves or visitors, including tourists. Direct benefits will be enjoyed by communities living in the Makassar Megapolitan as well as those along the west coast.

Indirect benefits will also be available, provided that preparations and suitable complementary investment is made in hinterland regions of the province outside those two sub-regions.

[13]Directorate General for Rail, 'Development of the railway line Makassar-Parepare', available at: http://djka.dephub.go.id/slide/profil-kegiatan, accessed 9 June 2020.

DIGITAL COMMUNICATION

The latest figures from the Indonesian Bureau of Statistics for 2019 provide useful perspectives on developments in the digital communications sector, including some comparative data between Indonesia and South Sulawesi.

The percentage of internet users has been rising significantly in Indonesia, including in South Sulawesi. An 'internet user' refers to anyone who has used the internet during the previous three months. In 2016 the percentage of households with one or more internet users in Indonesia was 47.2 per cent and by 2019 this rose to 73.8 per cent. Similarly, in South Sulawesi over this same period the figure grew from 47.1 per cent to 72.6 per cent.

Figure 26: Percentage of households with access to the internet, 2016 and 2019[14]

	2016	2019
South Sulawesi	47.1	72.6
Indonesia	47.2	73.8

When examining individual access to the internet, there is a small but steady gap in usage by females and males. In Indonesia and in South Sulawesi males maintain increased access to the internet compared to females.

Figure 27: Percentage of population aged 5 years and over with access to the internet 2017 and 2019[15]

	2017			2019		
	Males	Females	Total	Males	Females	Total
South Sulawesi	31.1	29.7	30.4	45.6	42.3	43.9
Indonesia	34.5	30.2	32.3	50.5	44.9	47.7

To increase internet penetration, the central government launched the Palapa Ring project in 2016. The project involves an undersea fibre-optic cable network that stretches across 13,000 kilometers and an onshore network of nearly 22,000 kilometres.[16] The project aimed to improve internet access in rural areas nationwide, with particular focus on eastern regions. This greater digital connectivity is anticipated to promote adoption of new services, from providing universal access to schools and e-health services to supporting the burgeoning financial technology market and increasing banking penetration in a market where around 51 per cent of people remain unbanked.[17] The project was completed in 2019, delivering 4G internet and improved download speeds across the country.[18]

Ownership of a mobile phone is a key factor in connectivity and independence. Again there is a gap in ownership between men and women, however it is much more pronounced at the national level. Relatively high phone ownership by women gives South Sulawesi a higher total percentage than Indonesia.

Figure 28: Percentage of population aged 5 years and over who own a mobile phone, 2017 and 2019[19]

	2017			2019		
	Males	Females	Total	Males	Females	Total
South Sulawesi	62.6	58.2	60.3	67.5	62.8	65.1
Indonesia	65.3	53.8	59.6	68.7	58.4	63.5

[14]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

[15]Ibid.

[16]Indonesia Investment, 'Internet infrastructure Indonesia: What about progress on the Palapa Ring?', available at: 16 April 2018, available at: https://www.indonesia-investments.com/news/todays-headlines/internet-infrastructure-indonesia-what-about-progress-on-the-palapa-ring/item8737.

[17]Oxford Business Group, 2018, 'Palapa Ring project to boost ICT development in Indonesia', Indonesia Country Report, cited on 27 September - https://oxfordbusinessgroup.com/analysis/missing-piece-bold-infrastructure-project-expected-bring-range-benefits-across-economy-especially

[18]Medina, Ayman Falak, 'Indonesia's Palapa Ring: Bringing Connectivity to the Archipelago', ASEAN Briefing, 28 January 2020, available at: https://www.aseanbriefing.com/news/indonesias-palapa-ring-bringing-connectivity-archipelago/.

[19]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

The ownership and use of computers at home is another factor that impacts on internet usage. In Indonesia there was a modest decrease in the percentage of homes with a computer between 2016 and 2019, from 19.1 per cent to 18.8 per cent. South Sulawesi is ahead of the national average but also saw a decrease in household ownership and use of computers over that period, down from 23.4 per cent to 22.9 per cent.

Figure 29: Percentage of households with home computer, 2016 and 2019[20]

	2016	2019
South Sulawesi	23.4	22.9
Indonesia	19.1	18.8

Indonesia has also seen a decline in the percentage of households that have landline telephones, due in a large part to internet and mobile phone access becoming more pervasive. There is a similar trend in South Sulawesi. Between 2016 and 2019 landline use declined from 3.5 per cent across Indonesia to 2.1 per cent. In the case of South Sulawesi, the decline was from 2.9 per cent in 2014 to 0.6 per cent in 2019.

Figure 30: Percentage of households with landline phone, 2016 and 2019[21]

	2016	2019
South Sulawesi	2.9	0.6
Indonesia	3.5	2.1

ENERGY

The energy generated by South Sulawesi has grown steadily since 2014. In 2018 it produced just shy of 8000 Gigawatt hours (GWh), which was the eighth largest total of the 34 provinces.[22] This is also the third largest amount outside Java, after North Sumatra and South Sumatra.

Figure 31: Electricity generated by South Sulawesi 2014-18 in GWh[23]

Indonesia's first wind power plant was opened by President Joko Widodo in July 2018 in Sidenreng Rappang (Sidrap) regency in South Sulawesi. Located in Desa Mattirotasi and Desa Lainungan, the plant consists of 30 turbines across 100 hectares of land.[24] Six months later, a second plant in Jeneponto regency was completed, with an additional 20 turbines. The construction of these plants is part of a national effort to reduce dependency on fossil fuels and increase the renewables proportion of national energy supply. Indonesia aims to have 23 per cent of contributions to the national grid come from renewables by 2025.[25]

[20]Ibid.

[21]Indonesian Bureau of Statistics, 'Statistical Yearbook of Indonesia 2020'.

[22]Indonesian Bureau of Statistics, 'Statistik Indonesia: Statistical Yearbook of Indonesia 2020'.

[23]Ibid.

[24]Hajramurni, Andi, 'Jokowi inaugurates first Indonesian wind farm in Sulawesi', Jakarta Post, 2 July 2018, available at: https://www.thejakartapost.com/news/2018/07/02/jokowi-inaugurates-first-indonesian-wind-farm-in-sulawesi.html.

[25]Walton, Kate, 'Indonesia should put more energy into renewable power', The Interpreter, 19 August 2019, available at: https://www.lowyinstitute.org/the-interpreter/indonesia-s-should-put-more-energy-renewable-power.

Regulations, finance and the abundance of coal in the country are all obstacles to achieving this increase.[26]

In addition to the wind power plants, three large dams are under construction in Paselloreng, Karalloe and Pamukkulu. These are part of the national government's effort to increase food and water security. When finished, the dams are expected to total 261.23 million cubic metres and help to increase the supply of irrigation water in the province, which has long been known as a national food centre.[27] Construction of these dams was expected in 2018 but has experienced some delays.

Access to electricity represents a key component of modern living. The South Sulawesi Bureau of Statistics outlines details of the availability of electricity for each household across the nation, including by province, with details disaggregated by city and regency living. There are three categories of access to electricity, namely:

- PLN (Perusahaan Listrik Negara – State Electricity Company): direct access to metered power from PLN;
- Non-PLN: access to non-PLN sources of power such as diesel generators and other off-grid systems; and
- No electricity: households with no access to electricity, thus reliant on non-electrical sources of energy such as wood fires or biogas.

Across the province each of our regional groupings has more than 90 per cent access to PLN electricity, with the province overall at 96.8 per cent. The highest rates are found in the Makassar Megapolitan and West Coast areas. The lowest level of access to PLN power is in Torajaland, with just 91.4 per cent. In this mountainous region, 6.7 per cent of households use electricity from alternate sources. In 2010, 20 per cent of households in Torajaland had no access to electricity at all, but this has decreased significantly now to only 1.9 per cent.[28]

Overall only 0.8 per cent of households across South Sulawesi have no access to electricity. This is a significant improvement from 2010 census results, when 9 per cent of households had no access.[29] Meanwhile, just under 2.4 per cent of households make use of electricity not sourced, directly or otherwise, from PLN.

The following table outlines the breakdown of access to electricity across the regions of South Sulawesi:

Figure 32: Electricity access in South Sulawesi 2019[30]

Area	PLN	Non-PLN	No electricity
South Sulawesi	96.8	2.4	0.8
South	92.0	7.1	0.9
Makassar – Megapolitan	98.5	0.7	1.6
West Coast	97.1	3.5	1.2
Central – East	96.9	2.0	1.1
Torajaland	91.4	6.7	1.9
Greater Luwu	95.0	4.6	0.5

**All figures percentages*

[26]Ibid.

[27]Cabinet Secretariat of the Republic of Indonesia, 'President Jokowi inspects Paselloreng Dam', 3 July 2018, available at: https://setkab.go.id/en/president-jokowi-inspects-paselloreng-dam/.

[28]Indonesian Bureau of Statistics, 'Census 2010'.

[29]Ibid.

[30]South Sulawesi Bureau of Statistics, 'South Sulawesi Province in Figures 2020'.

CONTACT US

Melbourne

Level 8, Building s
Monash University, Caulfield Campus
900 Dandenong Rd
Caulfield East VIC 3145

T: +61 3 9903 1296
E: admin@ausindcentre.org

JAKARTA

Ratu Plaza Office Tower, Level 9
Jalan Jenderal Sudirman Kav. 9
Tanah Abang, DKI Jakarta 10270

Makassar

Room 311, Level 3
Sekolah Pascasarjana Universitas Hasanuddin
Jalan Perintis Kemerdekaan, kilometer 10
Tamalanrea, Makassar 90245

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