“Iskandar Malaysia”
Content

• Introducing Iskandar Malaysia

• Roles & Responsibilities of IRDA

• Achievement Highlights

• Latest Progress Development in Iskandar Malaysia

• Investment in Iskandar Malaysia

• Summary
Formation of 5 Economic Corridors

**Koridor Utara**
- Established: 2007
- Focus Areas: Agriculture, Manufacturing & Tourism

**East Coast Economic Region**
- Established: 2008
- Focus Areas: Agriculture, Biotech, Tourism & Logistics
- Focus Areas: Oil & Gas, Tourism, Petrochemical, Manufacturing, Education, Agriculture

**Iskandar Malaysia**
- Established: 2006
- Focus Areas: 9 Economic Pillars

**Sabah**
- Established: 2007
- Focus Areas: Agriculture, Biotech, Tourism & Logistics

**SCORE**
- Established: 2008
- Focus Areas: Oil-based, Aluminium, Steel, Glass, Tourism, Palm Oil, Timber, Livestock, Aquaculture & Marine Engineering
Where are we?

- **ISKANDAR MALAYSIA** is the Super Economic Corridor that lies strategically at the heart of South East Asia on the southern tip of the Peninsula
- Centrally located in the **heart of South East Asia**
- Strategically located at the cross roads of the East-West trade lanes
- Within minutes to Singapore
Vision of Iskandar Malaysia

To be A Strong and Sustainable Metropolis of International Standing

Projected Growth 2006 to 2025

Indicator | 2006 | 2025 (CDP) | Annual rate of change (%)
--- | --- | --- | ---
Population (mil) | 1.6 | 3.0 | 4.63%
GDP per capita (PPP) in USD | 14,790 | 31,100 | 5.78%
Labour Force (mil) | 0.62 | 1.46 | 7.00%
Employment (mil) | 0.61 | 1.43 | 7.00%
Iskandar Malaysia’s Key Economic Thrusts

Iskandar Economy

“Strong, Diversified, Dynamic and Global”

The Main Pillars
- Electrical & Electronics
- Petrochemical & Oleochemical
- Food & Agro Processing
- Logistic & related Services
- Tourism

Support System

Basic Foundation

Strong Supporting Industries (Metal Products, Engineering, Non-metallic, Manufacturing Related Services (MRS))

Strong Supporting Institutions (Education, R&D, Government, Private & social institutions, communication & coordination system)

Four New Service-Based Pillars’

Five Main ‘Pillars’ to be reinforced

World-class Professionals and Technical Work Force

Excellent Physical, Infrastructures, including IT

Excellent Working & Living Environment

Stable Political, Social Environment

Adopted from Iskandar Regional Development Authority
9 Focus Economic Sectors

Services

**Tourism**
- Theme Parks
- Family Entertainment Centre
- Hotel, dining & shopping
- MICE

**Education**
- Private School
- Higher Education Institution
- Specialized skills training centre

**Healthcare**
- Specialist Medical Service
- Diagnostic medical Service
- T&CM, wellness

**Creative**
- Film, television, games, animation
- Online mobile content generation
- Integrated media & content services

**Logistics**
- Transportation
- Aerospace
- Oil Storage & trading hub
- Halal logistic hub
- Warehousing

**Financial Services**
- Islamic banking & finance, retail & wholesale banking, PSSO, BPO, financial & other professional services
- Offshore financial services

Manufacturing

**Electrical & Electronics**
- Advance E&E
- Renewable Energy
- Automotive & Rail
- R&D
- Medical devices
- Security & Defence

**Oleo- & Petro-chemicals**
- O&G Processing, Support industries
- Biotechnology
- Polymer production
- Aromatics & Olefins

**Food & Agro-Processing**
- Palm Oil based products
- Cocoa based products
- Halal derivatives
- Agriculture biotechnology
- Healthcare biotechnology

Adopted from Iskandar Regional Development Authority
Identified Economic Clusters in 5 Flagships

**JB CITY CENTRE**
- Financial, Cultural and Urban Tourism

**NUSAJAYA**
- Education & Medical Tourism
- Entertainment & Recreation
- State Administration
- Finance
- Biotechnology

**WESTERN GATE DEV**
- Logistics
- Free Zone Industrial Area
- Regional Distribution, International Procurement
- Oil storage Terminals

**SENAI-SKUDAI**
- Logistics
- Manufacturing (esp. high tech and aerospace related)
- Tourism (Luxury Shopping Destination)
- Cybercity

**EASTERN GATE DEV**
- Manufacturing (Electronics, petrochemicals, oleochemicals etc)
- Oil Storage Terminals

**TANJUNG PELEPAS**
- Financial, Cultural and Urban Tourism

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**Logistics**
- Free Zone Industrial Area
- Regional Distribution, International Procurement
- Oil storage Terminals

**Manufacturing (esp. high tech and aerospace related)**
- Logistics
- Regional Distribution, International Procurement
- Oil storage Terminals

**Tourism (Luxury Shopping Destination)**
- Free Zone Industrial Area
- Regional Distribution, International Procurement
- Oil storage Terminals

**Cybercity**
- Logistics
- Free Zone Industrial Area
- Regional Distribution, International Procurement
- Oil storage Terminals
Key Players in 5 Flagships

**A. JB City Centre**
1. Johor Corporation
2. Danga Bay
3. Iskandar Investment Berhad
4. Dijaya Group

**B. Nusajaya**
1. Kota Iskandar
2. MEDINI
3. EduCity
4. LEGOLAND
5. Puteri Harbour
6. SiLC
7. BioXcell

**C. Tanjung Pelepas**
1. PTP
2. Tg. Bin Maritime Centre
3. BMW
4. Flextronics

**D. Pasir Gudang / Tanjung Langsat**
1. Bahru Stainless (Acerinox and Nisshin Steel)
2. Titan Chemicals
3. Asiaflex (Technip)
4. Idemitsu
5. Hitachi Chemicals
6. Langsat Terminal 1 & 2
7. Seri Alam, City of Knowledge

**E. Senai-Skudai**
1. Senai Airport
2. Senai High Tech Park
3. Johor Premium Outlets
4. MSC Cyberport City
5. Dyson
6. Seagate
7. Panasonic AVC
• Introducing Iskandar Malaysia

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Who are we?

Iskandar Regional Development Authority (IRDA) is a Statutory Body established through an Act of Parliament to deliver on the Iskandar Malaysia vision.

IRDA Act 2007 (Act 664) empowers IRDA to Plan, Promote and Facilitate the development in the region.

Supported by the Prime Minister and Chief Minister of Johor, both Joint Chairmen of the IRDA Members of Authority and esteemed Advisory Council.

Integrated planning to ensure world-class benchmarks are adopted in development, for example in transportation, urban design, safety and security etc.

Collaboration with relevant authorities ensuring seamless service delivery to investors (example: one-stop-centre to fast track approval and provide customer service)

Adopted from Iskandar Regional Development Authority
Governance Structure

Adoption from Iskandar Regional Development Authority
Roles and Responsibilities

PLANNING

- Master Planning (inclusive of Social Planning)
- Economic Planning Clusters
- Recommend policies, laws, actions and incentives

PROMOTION

- Brand guardian of Iskandar Malaysia as an investment destination
- Promote private and public investments in Iskandar Malaysia
- Disseminate information to investors and public

FACILITATION

- Monitor and align sector developments
- Coordinate and monitor enabler developments
- Principal coordinating agent for approval

Adopted from Iskandar Regional Development Authority
Presentation Outline

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Completion of Infrastructure, Amenities and Social Programs

- Jalan Kolam Ayer Upgrading: 28th April 2010
- Ulu Tiram Interchange: 18th March 2011
- Senai-Desaru Highway: June 2011
- Kulai Interchange: 13th Oct 2011
- Yahya Awal Interchange: 28th Oct 2010
- Skudai-Senai Highway: 22nd April 2011
- Public Housing: Mack 2012
- Abu Bakar Interchange: April 2012
- Eastern Dispersal Link: 1 April 2012
- Coastal Highway: 15 April 2012

Adopted from Iskandar Regional Development Authority
Committed investment & completion of Education Projects

- UniKL: December
- Newcastle Medical University: September
- University of Reading: April
- Raffles University: April
- Marlborough College: August
- HELP University College: July
- UiTM: September
- Malaysia Art School: June

2010
2011
2012
2013

Adopted from Iskandar Regional Development Authority
Healthcare & Biotechnology Related Development

- **Pasir Gudang Specialist Hospital – KPJ Healthcare (120-bed)**
- **Dato’ Onn International Specialist Hospital**

**KPJ Hospitals**
- < 2009
- 2009 Regency
- Columbia Asia 2010
- Dec 2012
- Sept 2012
- 2013 Bio-Xcell
- 2014 Gleneagles Medini
- 2014 Wellness Centre

**Wellness Centre**
- 2015

**Econ Medicare Centre** - 200-bedded medical centre with nursing care.

Adopted from Iskandar Regional Development Authority
Creative – Pinewood Iskandar Malaysia Studios

2013

- IM Creative Industry Talent Dev Program Jan-Dec
- Pilot Project: Digital COE Setup Jan-Dec
- Official Launch of FIMI Guideline Feb
- ICON apps Boot Camp Mar-Dec
- PIMS open May

2014 - 2015

- PIMS Official Launch Sep
- Entertainment@Iskandar Malaysia Sep
- Media@Medini Phase 1: 2015

Investment: PIMS - MMU+USC - Media@Medini; Link - AL - R&H - RCP - AIR – IMA - MetFilm - BroadC
Tourism – Sports & Leisure

2013

- Opening Traders Hotel
  - April
- Commence Motorsports City
  - Q3

2014 - 2015

- Commence China Mall
  - Q4
- Opening LEGOLAND Hotel
  - Jan. 2014
- Opening LEGOLAND Water Park
  - Dec 2013
- 3rd Theme Park 2014

Motorsports City, Gerbang Nusajaya
“Nurburgring of Iskandar Malaysia”
Iskandar Malaysia Comes Alive 2012

- **Johor Bahru Chingay Parade 2012**: Feb 2012
- **Kanival Budaya dan Warisan JB 2012**: Mar 2011
- **1 Hari Francais @ JB**: May 2011
- **JB Arts Festival Sept 2012**:
- **JB10K**: Nov 2012
- **Smart City Forum**: Nov 2012
- **IM Corridor & Cities Transformation Programme Open**: Mar 2012
- **Submitting KM Hotel & Apartment**: May 2012
- **Tilawah Al-Quran Peringkat Kebangsaan**: Jun 2012
- **Opening City Square**: Sept 2012
- ** JB Transformation Open Day**: Oct 2012
- ** World International Economic Forum**: Dec 2012
- **Opening Galleria @ Kotaraya**: Sept 2012

**The Big September!**

**JB10K**: Nov 2012

**Smart City Forum**: Nov 2012
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Development in Progress – Flagship A
Johor Bahru City Centre

Adopted from Iskandar Regional
Development Authority
Development in Progress – Flagship A Johor Bahru City Centre

TROPICANA DIJAYA

SP SETIA SKY 88

SENIBONG COVE

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship A
Johor Bahru City Centre

TROPEZ RESIDENCES

SOUTHKEY

THOMSON HOSPITAL

Adopted from Iskandar Regional Development Authority
Developments in Flagship B

JOHOR STATE GOVT OFFICE – KOTA ISKANDAR

PUTERI HARBOUR

CIQ PUTERI HARBOUR

Adopted from Iskandar Regional Development Authority
Developments in Flagship B – Puteri Harbour

HELLO KITTY INDOOR THEME PARK

LAT’s PLACE RESTAURANT

LITTLE RED CUBE SHOPPING MALL

TRADERS HOTEL & SOMERSET

Adopted from Iskandar Regional Development Authority
Developments in Flagship B – Legoland & Medini

LEGOLAND – 1st IN ASIA

LEGOLAND HOTEL

MALL OF MEDINI

MEDINI CENTRAL

Developments in Flagship B – Legoland & Medini

Adopted from Iskandar Regional Development Authority
Developments in Flagship B – Horizon Hills

LEDANG HEIGHTS

HORIZON HILLS

EAST LEDANG

Adopted from Iskandar Regional Development Authority
Developments in Flagship B - Educity

NEWCASTLE UNIVERSITY

MARLBOROUGH COLLEGE

RAFFLES UNIVERSITY

NETHERLAND MARITIME INST TECHNOLOGY

Adopted from Iskandar Regional Development Authority
Developments in Flagship B - EduCity

SOUTHAMPTON UNIVERSITY

INTERNATIONAL STUDENT VILLAGE

MULTI VARSITY COMPLEX

STADIUM & SPORTS COMPLEX

Adopted from Iskandar Regional Development Authority
Developments in Flagship B - Pinewood IM Studios

PINEWOOD ISKANDAR MALAYSIA STUDIOS

Adopted from Iskandar Regional Development Authority
New Development in Flagship B
Gerbang Nusajaya & Sunway Iskandar

CHINA MALL

FAST TRACK MOTORSPORT

GLENEAGLES PRIVATE HOSPITAL

SUNWAY ISKANDAR

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship C Port of Tanjung Pelepas

TG BIN COAL FIRE POWER PLANT

TANJUNG PELEPAS PORT

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship C Eco-Tourism

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship D
City of Knowledge

EXCELSIOR INTERNATIONAL SCHOOL

UNIVERSITI TEKNOLOGI MARA SERI ALAM

PEGASUS INTERNATIONAL SCHOOL

MALAYSIA ARTS SCHOOL

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship D
City of Knowledge

UNIVERSITI KUALA LUMPUR

MARA JUNIOR SCIENCE COLLEGE

ASIA METROPOLITAN UNIVERSITY

JAPANESE SCHOOL

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship D

TANJUNG LANGSAT TERMINAL

TANJUNG LANGSAT INDUSTRIAL COMPLEX

BAHRU STAINLESS – JV ACERINOX SPAIN & NISSHIN STEEL JAPAN

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship E

I-PARK@ INDAHPURA

THE SENAI GARDEN

Adopted from Iskandar Regional Development Authority
Development in Progress – Flagship E Johor Premium Outlets

Adopted from Iskandar Regional Development Authority
Development in Flagship E – Senai Airport

SENAI INTERNATIONAL AIRPORT

NANO MALAYSIA CENTER

SENAI HI TECH PARK

Private chartered planes

Adopted from Iskandar Malaysia Development Authority
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Iskandar Malaysia Development Phases

Phase 1
Planning & Building the Foundation

Investment Target = RM 47 bil
WE ARE HERE RM106.31
Targeting catalyst investments

Phase 2
Strengthening and Generating Growth

Investment Target = RM 73 bil
Targeting matured and sustainable investments

Phase 3
Sustain & Innovate

Investment Target = RM 383 bil
Progressive & sustainable investments and economic development

2007 - 2009
2010 - 2015
2016 - 2025

Adopted from Iskandar Regional Development Authority
Cumulative Committed Investment

Year-on-Year (2006 – March 2013)

Cumulative Committed Investment - by Sector
March 2013

- Manufacturing: 35.33
- Petrochemical: 5.95
- Utilities: 9.53
- Government: 8.31
- Emerging Tech: 1.03
- Industrial: 4.87
- Retail: 8.25
- Properties (Residential): 27.3
- Finance: 0.6
- Education: 1.55
- Port/Logistic: 4.43
- Creative: 0.4
- Healthcare: 1.6

Note 1: Government; Kota Iskandar project add 1Bil
Note 2: Properties; reclassification of industrial and retail

Adopted from Iskandar Regional Development Authority
Committed Investment – Local Vs Foreign

Source: IRDA, Khazanah, IIB, MIDA as at Dec 2012 & corporate announcements
## Cumulative Realised Investment 2006 – March 2013

<table>
<thead>
<tr>
<th>SECTOR</th>
<th>Cumulative Realised Dec 2012 (RM Bill)</th>
<th>Cumulative Realised as of March 2013 (RM Bill)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>19.44</td>
<td>19.44</td>
</tr>
<tr>
<td>Petrochemical</td>
<td>2.64</td>
<td>2.70</td>
</tr>
<tr>
<td>Healthcare</td>
<td>0.21</td>
<td>0.24</td>
</tr>
<tr>
<td>Tourism</td>
<td>1.01</td>
<td>1.02</td>
</tr>
<tr>
<td>Port / Logistic</td>
<td>1.96</td>
<td>2.18</td>
</tr>
<tr>
<td>Education</td>
<td>0.37</td>
<td>0.37</td>
</tr>
<tr>
<td>Property - Residential</td>
<td>6.90</td>
<td>7.07</td>
</tr>
<tr>
<td>Utilities</td>
<td>3.65</td>
<td>3.75</td>
</tr>
<tr>
<td>Retail</td>
<td>1.39</td>
<td>1.78</td>
</tr>
<tr>
<td>Industrial</td>
<td>0.53</td>
<td>0.53</td>
</tr>
<tr>
<td>Government</td>
<td>5.59</td>
<td>5.74</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>43.69</strong></td>
<td><strong>44.82</strong></td>
</tr>
</tbody>
</table>

Source: IRDA, Khazanah, IIB corporate announcements & MIDA Dec 2012 Report
## TOP 10 Foreign Investors in ISKANDAR MALAYSIA

<table>
<thead>
<tr>
<th>Countries</th>
<th>RM billion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td>6.32</td>
</tr>
<tr>
<td>Spain</td>
<td>4.20</td>
</tr>
<tr>
<td>Japan</td>
<td>3.74</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2.85</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>1.90</td>
</tr>
<tr>
<td>Australia</td>
<td>1.80</td>
</tr>
<tr>
<td>Lebanon</td>
<td>1.70</td>
</tr>
<tr>
<td>France</td>
<td>1.63</td>
</tr>
<tr>
<td>China</td>
<td>1.58</td>
</tr>
<tr>
<td>Germany</td>
<td>1.53</td>
</tr>
</tbody>
</table>

*Source: MIDA Dec 2012 Report*
Investment Focus – Moving forward

Services Sector focus:

- Healthcare
- Education
- Tourism
- Creative
- Logistics
- Financial Services

Some targeted countries:

- China
- Singapore
- Korea
- Euro countries
- India
- Japan
- USA
- Indonesia

Adopted from Iskandar Regional Development Authority
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5.1. Performance to date

Business Improvement

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>1410</td>
</tr>
<tr>
<td>2012</td>
<td>1696 (20.28%)</td>
</tr>
<tr>
<td>2013 (Feb)</td>
<td>1710 (21.28%)</td>
</tr>
</tbody>
</table>

Development

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>5</td>
</tr>
<tr>
<td>2011</td>
<td>9</td>
</tr>
<tr>
<td>2012</td>
<td>14</td>
</tr>
</tbody>
</table>
Valuation of property on which development have been approved for the year 2012

<table>
<thead>
<tr>
<th>INVESTOR</th>
<th>PRODUCT</th>
<th>NILAIAN</th>
<th>TAX (0.26%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connoisseur Towers Sdn Bhd</td>
<td>Service Apartment</td>
<td>RM 43,374,000.00</td>
<td>RM 112,772.40</td>
</tr>
<tr>
<td>UM Land Berhad</td>
<td>Service Apartment + Hotel</td>
<td>RM 124,971,000.00</td>
<td>RM 324,924.60</td>
</tr>
<tr>
<td>MB Vest Sdn Bhd</td>
<td>Service Apartment + Hotel</td>
<td>RM 237,393,000.00</td>
<td>RM 617,221.80</td>
</tr>
<tr>
<td>Chiam Soh Yong Realty Co., Sdn Bhd</td>
<td>Shop office</td>
<td>RM 7,821,000</td>
<td>RM 20,334.60</td>
</tr>
</tbody>
</table>

PROJECTED NEW ASSESSMENT TAX
RM 1,413,822.80
Value Proposition

STRATEGIC LOCATION
- Centrally located in the heart of East Asia
- Leveraging on the close proximity to Singapore with Global connectivity
- Sustainable economic growth within ASEAN region

PHYSICAL & ECONOMIC INFRASTRUCTURE
- 3 world-class ports, 1 international airport and 2 additional ports + an international airport in Singapore
- Connectivity—highways, train, broadband, availability support services
- Availability of quality skills/manpower
- Upgraded physical and social infrastructure

SOLID GOVERNMENT COMMITMENT
- Consistent and transparent Government policies
- Creation of IRDA to facilitate businesses & investments
- Ease of sourcing capital, goods and resources

CAPITAL RETURNS
- Attractive investor value propositions – High upside potential for investments
- Overall Competitiveness – Total cost of doing business

Adopted from Iskandar Regional Development Authority
ISKANDAR REGIONAL DEVELOPMENT AUTHORITY

CONTACT US AT:

IRDA Headquarters
Iskandar Regional Development Authority (IRDA)
#G-01, Block 8
Danga Bay, Jalan Skudai
80200 Johor Bahru
Malaysia

Tel: +607-233 3000
Fax: +607-233 3001

IRDA Satellite Office
Iskandar Regional Development Authority (IRDA)
Suite 5-3, 5th Floor, Block 3B
Plaza Sentral, Jalan Stesen Sentral 5
50470 Kuala Lumpur,
Malaysia

Tel: +603-2260 6777
Fax: +603-2260 7999

www.iskandarmalaysia.com.my