

SENAYAN SQUARE PROJECT



**Presentation Material
on 5th September 2017**

1. Project Overview



1. Project Overview

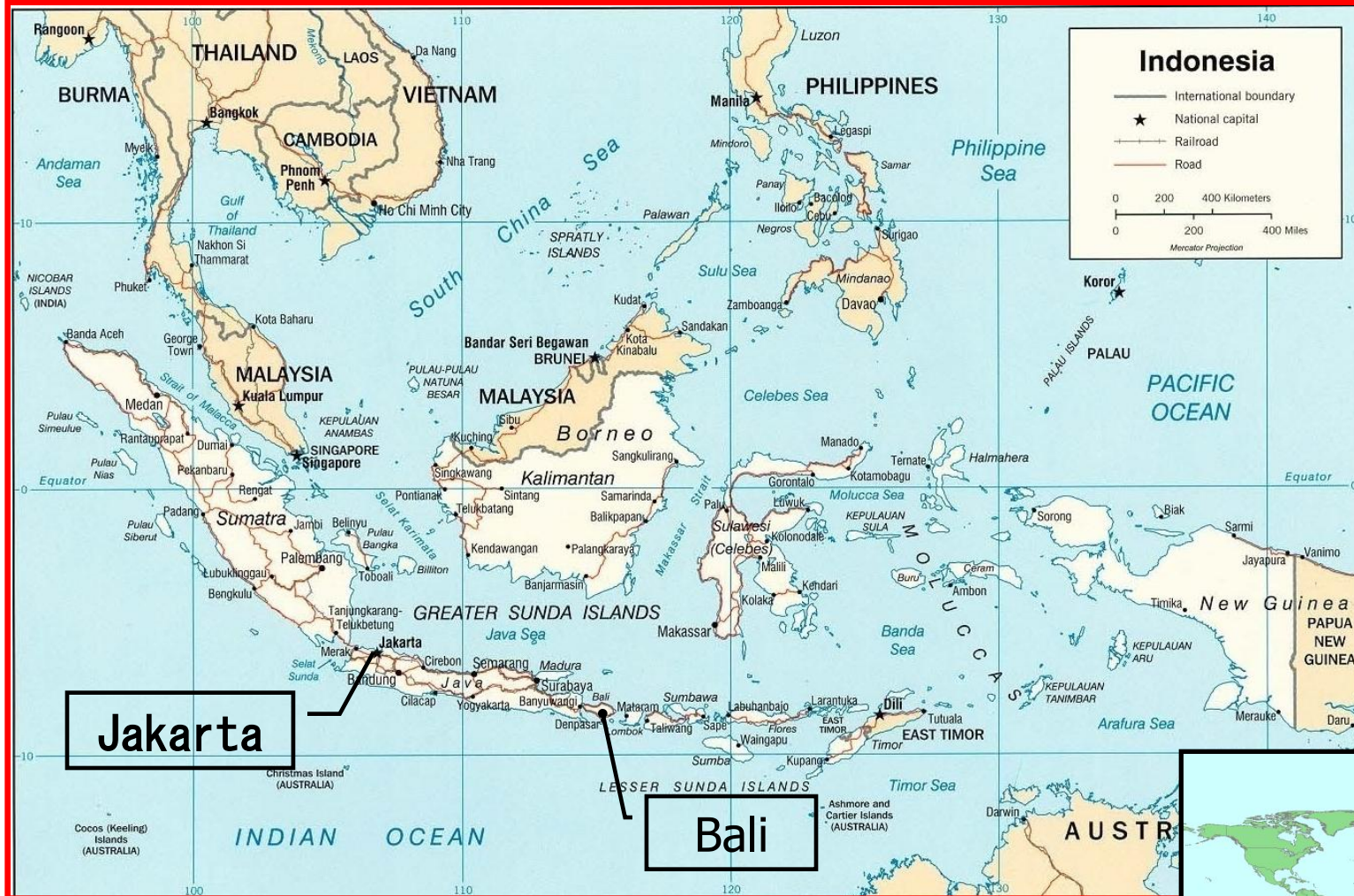
(1) Location

(2) Master Plans

(3) Facilities



1. Project Overview - Location



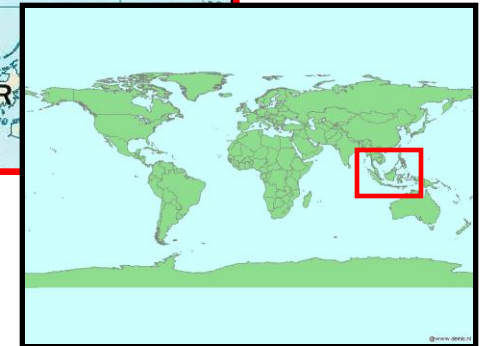
DISTANCE

EAST - WEST
: 5,100km

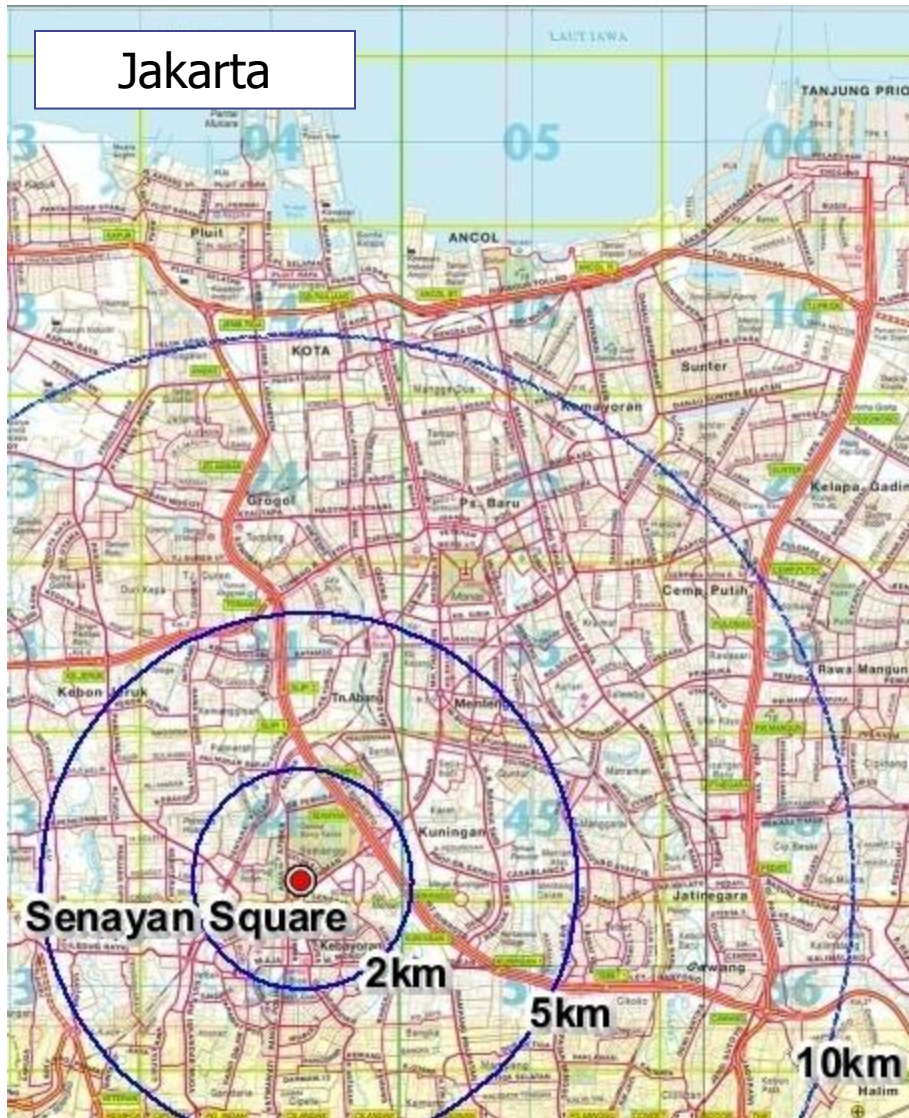
TOKYO
- JAKARTA:
: 5,792km

NEW YORK
- LOS ANGELES:
: 3,941km

ISLANDS
: 13,466



1. Project Overview - Location

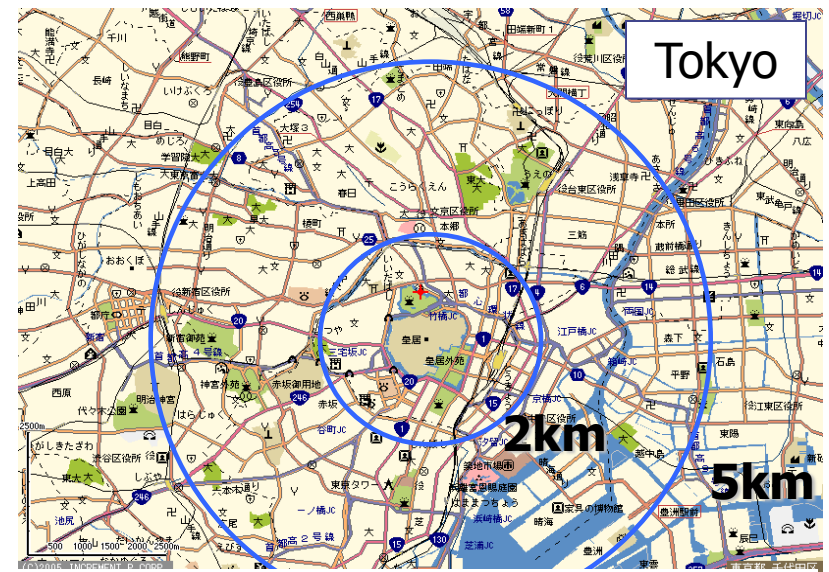


Growth of Jakarta

Batavia (Jakarta) was established in 1600's by the Dutch East India Company.

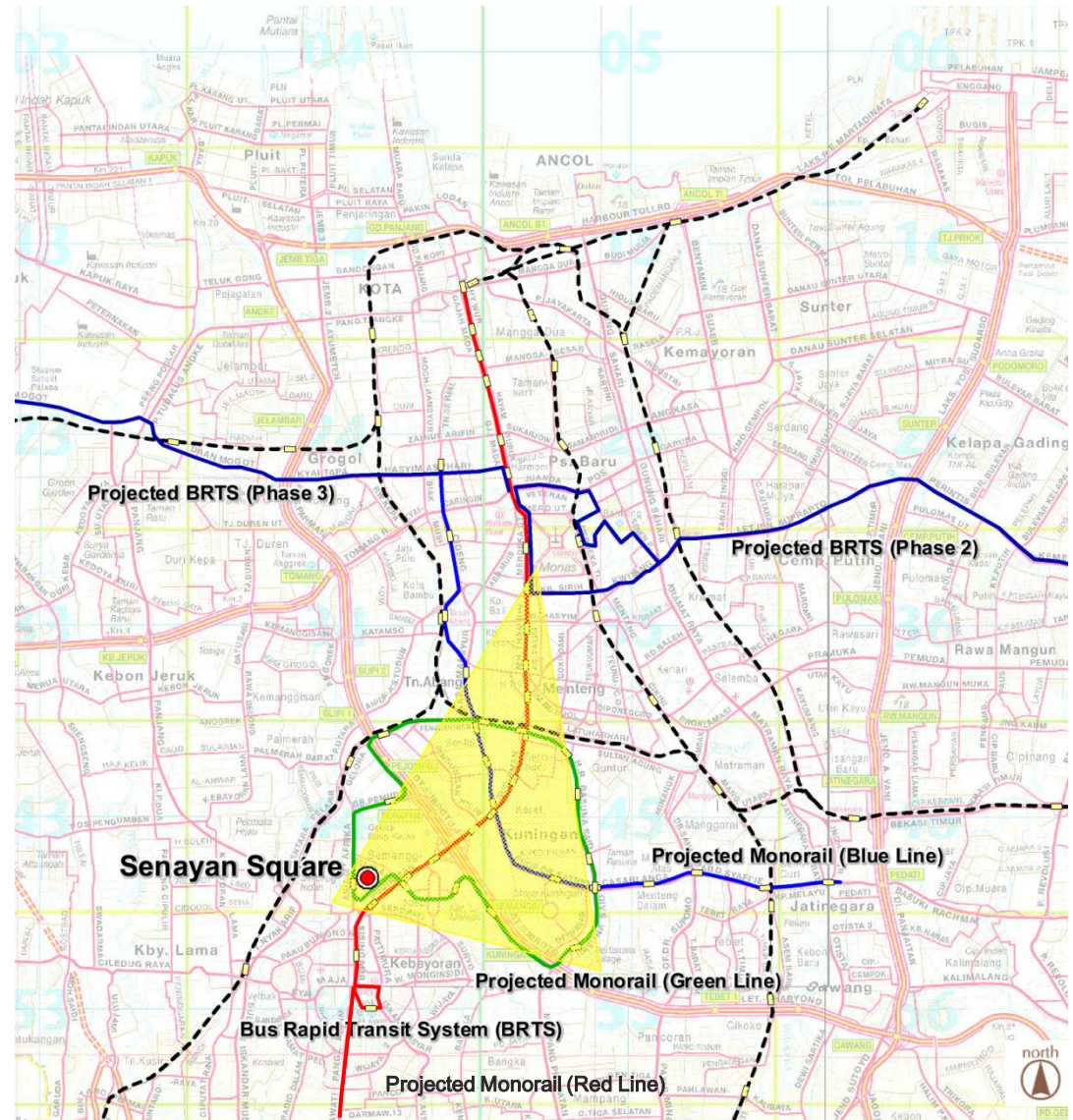
Overtime the City expanded inland.

Center of modern day Jakarta is the "Golden Triangle".



-South of the CBD -

- South of the Golden Triangle / Central Business District.
- Excellent potential due to expansion of public transportation infrastructure.



Strategic location

- Green and open environment next to the national stadium and golf course.
- Boeder with luxury residential area.
- Minutes from airport toll road and Sudirman CBD
- Outside of "odd/even" traffic restrictions area.*

* During morning and evening rush hour certain roads are restricted access only on alternative days depending on last digit of vehicle registration number (odd or even).



1. Project Overview

(1) Location

(2) Master Plans

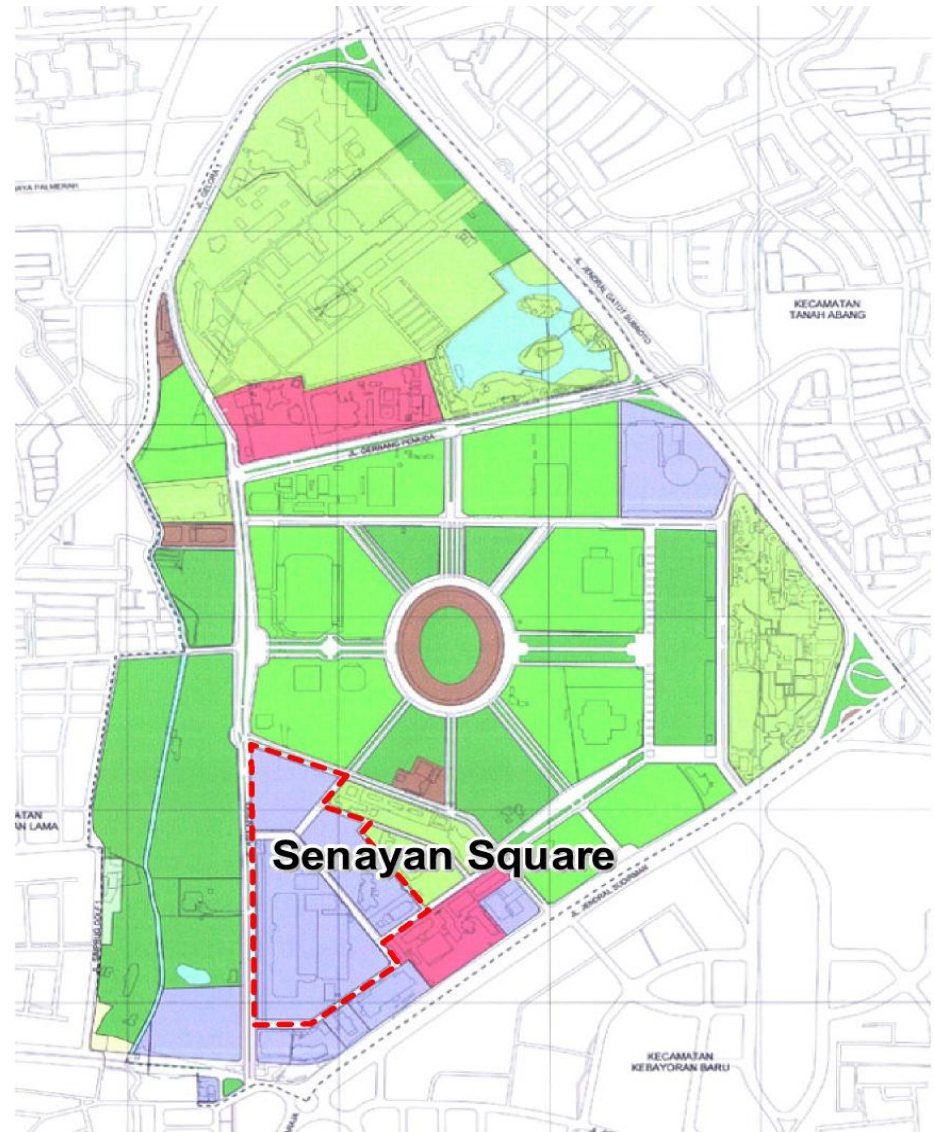
(3) Facilities

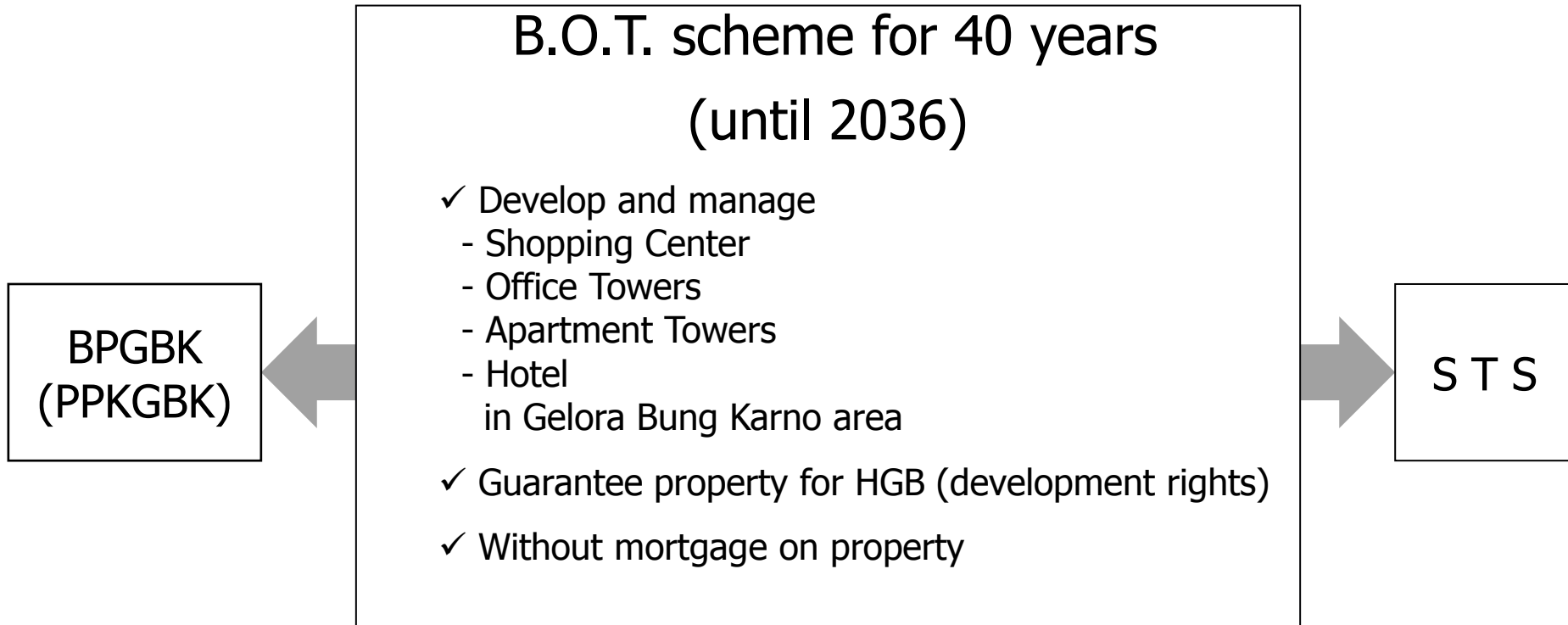


Project Features

- i) Development aid
Private sector development under Build-Operate-Transfer agreement
- ii) Urban redevelopment
Redevelopment of part of national stadium land for commercial use (similar to the Jingu Gaien in Tokyo)
- iii) Multi-use development
19 hectares site

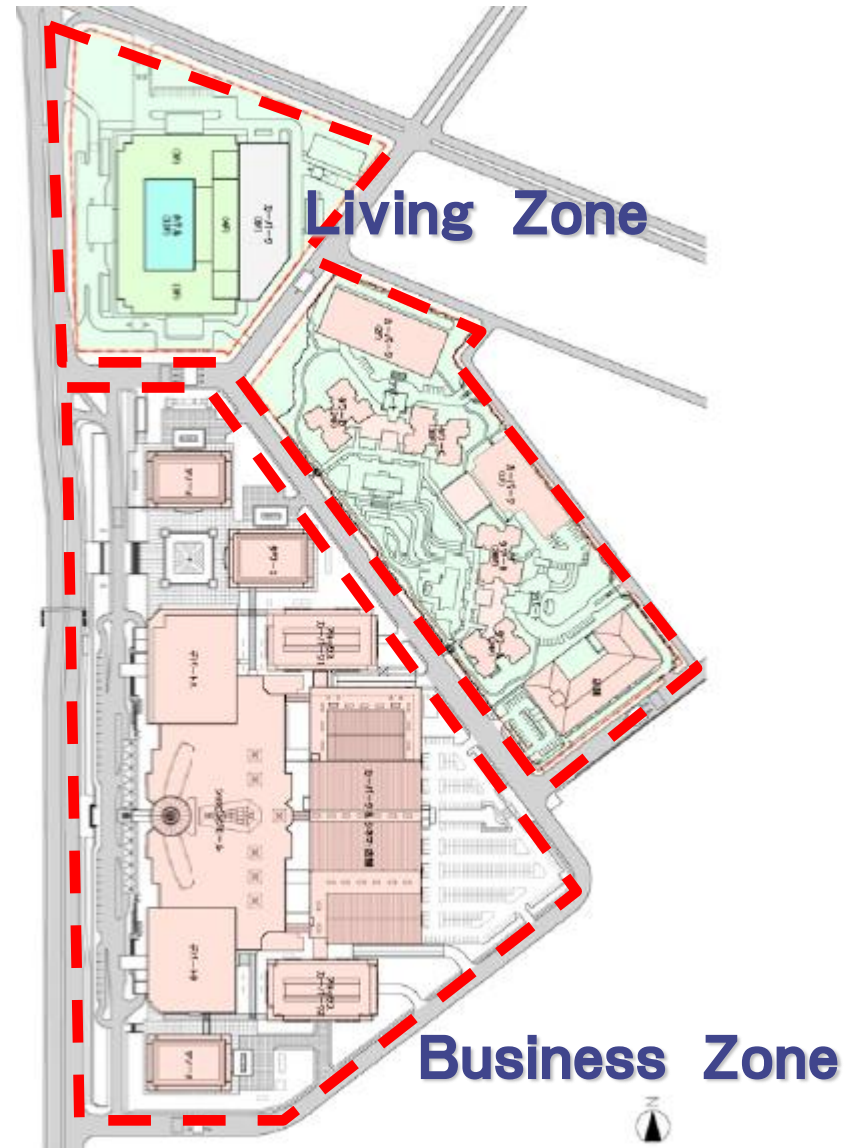
Senayan Sports Complex (Gelora Bung Karno Senayan)
Total area: approx. 284ha





Multi-use development

- i) Business zone
shopping Center, Office Towers
- ii) Living zone
Apartment Towers, Hotel
- iii) Total site area
19 hectares



1. Project Overview - Master Plans



1. Project Overview - Master Plans



(October 2008)



1. Project Overview - Master Plans



(April 2011)



1. Project Overview - Master Plans



(July 2015)



1. Project Overview

(1) Location

(2) Master Plans

(3) Facilities



Plaza Senayan (Shopping center) - Grand Opening in April 1996

- Retail mall and METRO (department store)
- Total floor area
56,212 sqm + 20,553 sqm



Schematic design: RTKL



1. Project Overview - Facilities



Atrium (Retail Mall)



1. Project Overview - Facilities



Retail Mall



1. Project Overview - Facilities



Other luxury brands:

GUCCI, COACH, BALLY, DVF, CARTIER ,
MAXMARA, KATE SPADE, TIFFANY,
OMEGA, MONT BLANC, FENDI,
ERMENEGILDO ZEGNA, etc



1. Project Overview - Facilities



CRYSTAL JADE



X2 LOUNGE



MOS BURGER



MARCHE

1. Project Overview - Facilities



UNION



Monolog & de Luca





METRO (Department Store)

SOGO, Grand Opening in October 1999

- Total floor area
26,716 sqm



Cinema Relocation and Food & Beverages in Car Park Building Grand Opening in May 2007



Total floor area
4,400 sqm (←2,500 sqm)



Façade Upgrade in February 2008

- Upgrade of Entrance, Façade, Lighting and Canopy



1. Project Overview - Facilities

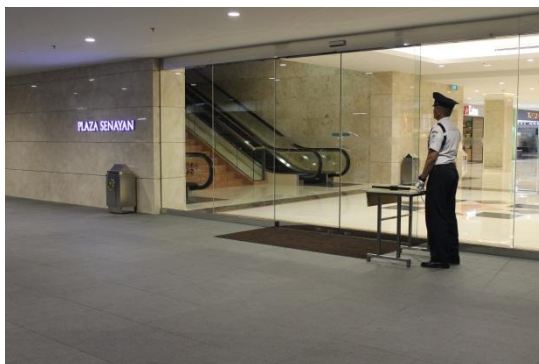
Renovation In the METRO(Department Store) Basement Area

Grand Opening in May 2017



Supermarket \Rightarrow Retail Area
(Food & Beverage, Beauty,
Service, etc.)

Renovation floor area : 4,500 Sqm



Sentral Senayan I, Grand Opening in October 1997

- Total floor area
38,130 sqm
- Tenants
Chevron / Tokio Marine
Kaikoukai / Oracle
Master Card / HSBC etc.



Sentral Senayan II, Grand Opening in February 2008

- Total floor area
60,000 sqm
- Tenants
 - Mitsubishi Corp.
 - Chevron / ERIA
 - Mitsubishi heavy Industries
 - Nomura / NZ Embassy / JICA
 - Nippon Steel & Sumitomo Metal
 - Google etc.



Sentral Senayan III, Grand Opening in December 2010

- Total floor area
58,000 sqm
- Tenants
Bank Maybank Indonesia
Ogilvy & Mather / P&G
VOLVO / JGC Corp etc.



1. Project Overview - Facilities

Apartemen Plaza Senayan, Grand Opening Tower A: March 1998 + Tower B: September 1998

- Total floor area
44,905 sqm
- 204 units



Apartemen Plaza Senayan, Grand Opening Tower C: September 2012 + Tower D: October 2012

- Total floor area
57,000 sqm
- 217 units



Plaza Senayan Arcadia, Soft Opening in April 2005



- Total floor area 6,000 sqm



Fairmont Jakarta, Grand Opening in August 2015

- Total floor area
125,000 sqm
- 488 rooms +
Serviced Suites



1. Project Overview - Facilities





MAIN ENTRANCE LOBBY



RECEPTION LOBBY



ELEVATOR LOBBY



STANDARD BED ROOM



SKY SUITE – LIVING ROOM

1. Project Overview - Facilities



SKY SUITE - MASTER BED ROOM





PRESIDENTIAL SUITE – LIVING ROOM



PRESIDENTIAL SUITE - MASTER BED ROOM



BALLROOM



SWIMMING POOL



BAR LOUNGE : BARONG BAR



TEA LOUNGE : PEACOCK LOUNGE



ALL-DAY-DINING RESTAURANT : SPECTRUM

1. Project Overview - Facilities



OPEN AIR BAR LOUNGE : K22BAR - DAY TIME



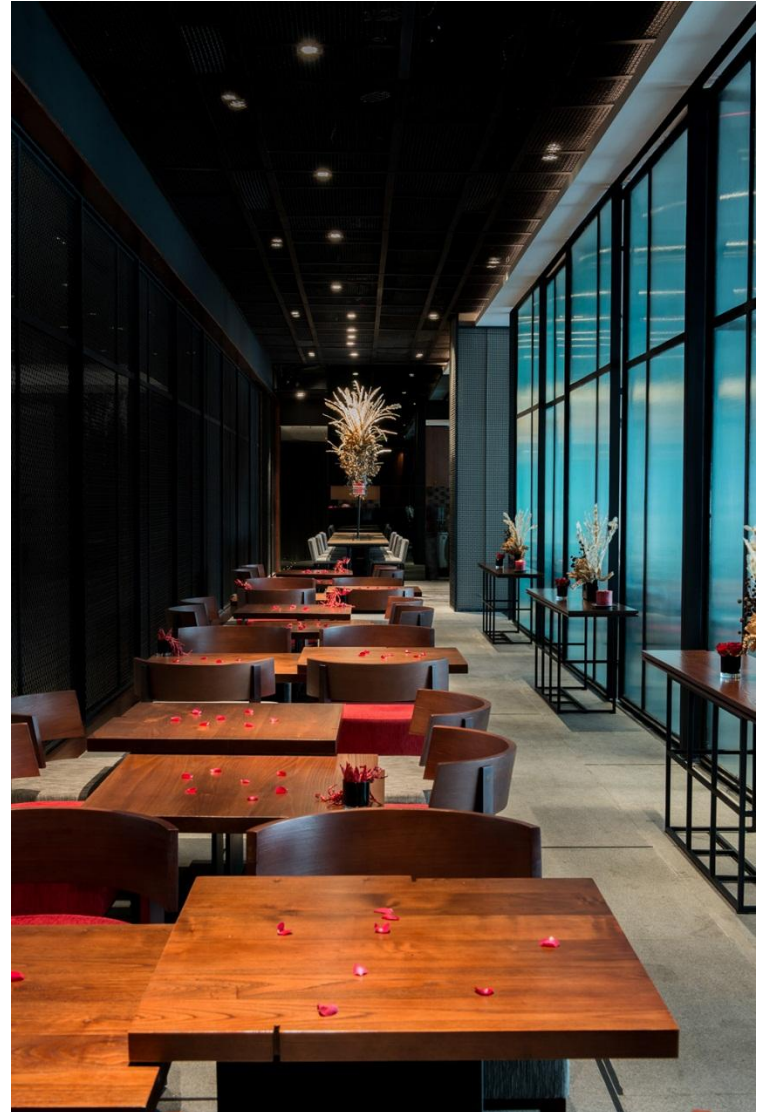


OPEN AIR BAR LOUNGE : K22BAR - NIGHT TIME

1. Project Overview - Facilities



INDONESIAN RESTAURANT
: 1945



1. Project Overview - Facilities



JAPANESE RESTAURANT
: SENSU



1. Project Overview - Facilities



CHINESE RESTAURANT
: HOUSE OF YUEN



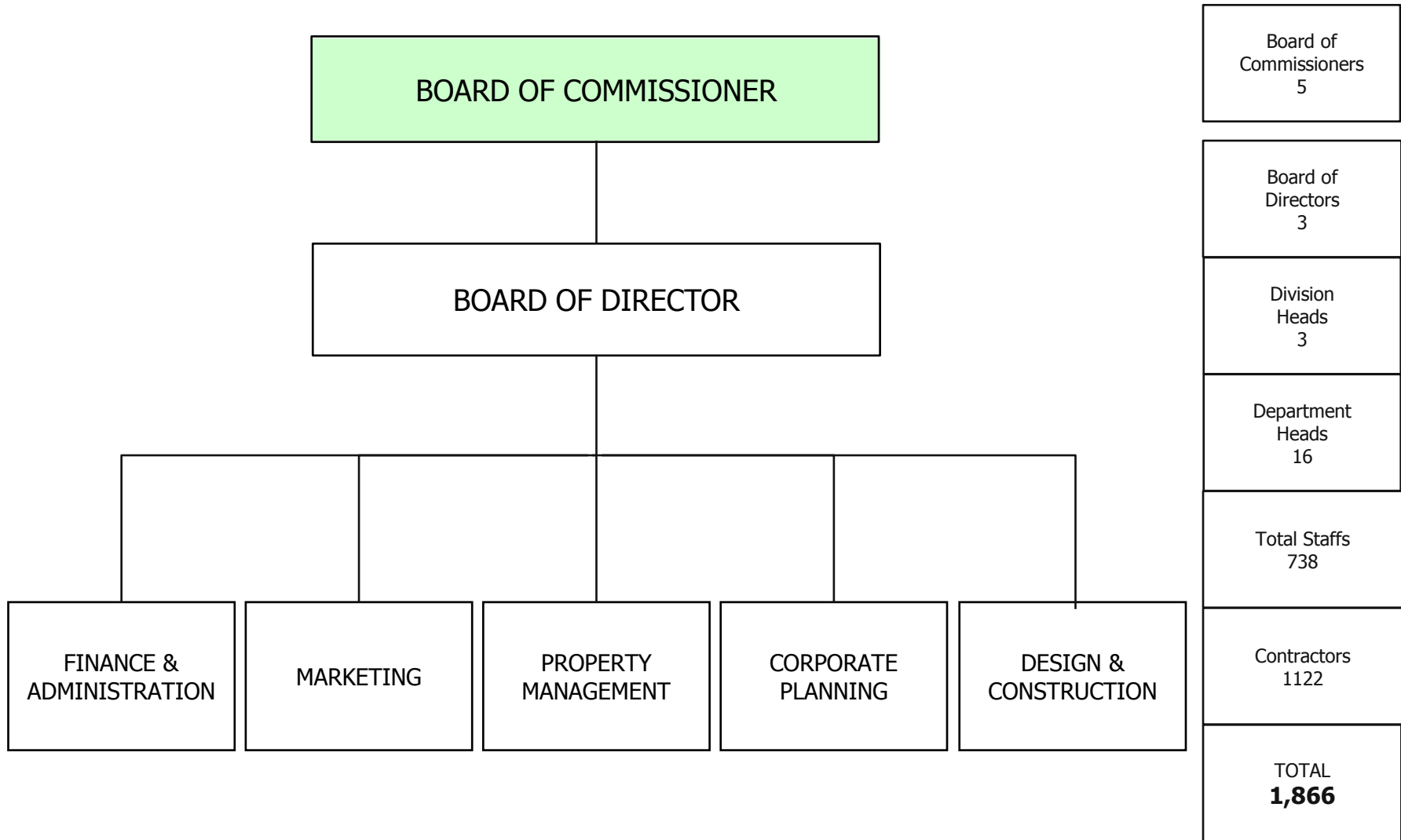


LIVE MUSIC RESTAURANT : MOTION BLUE JAKARTA

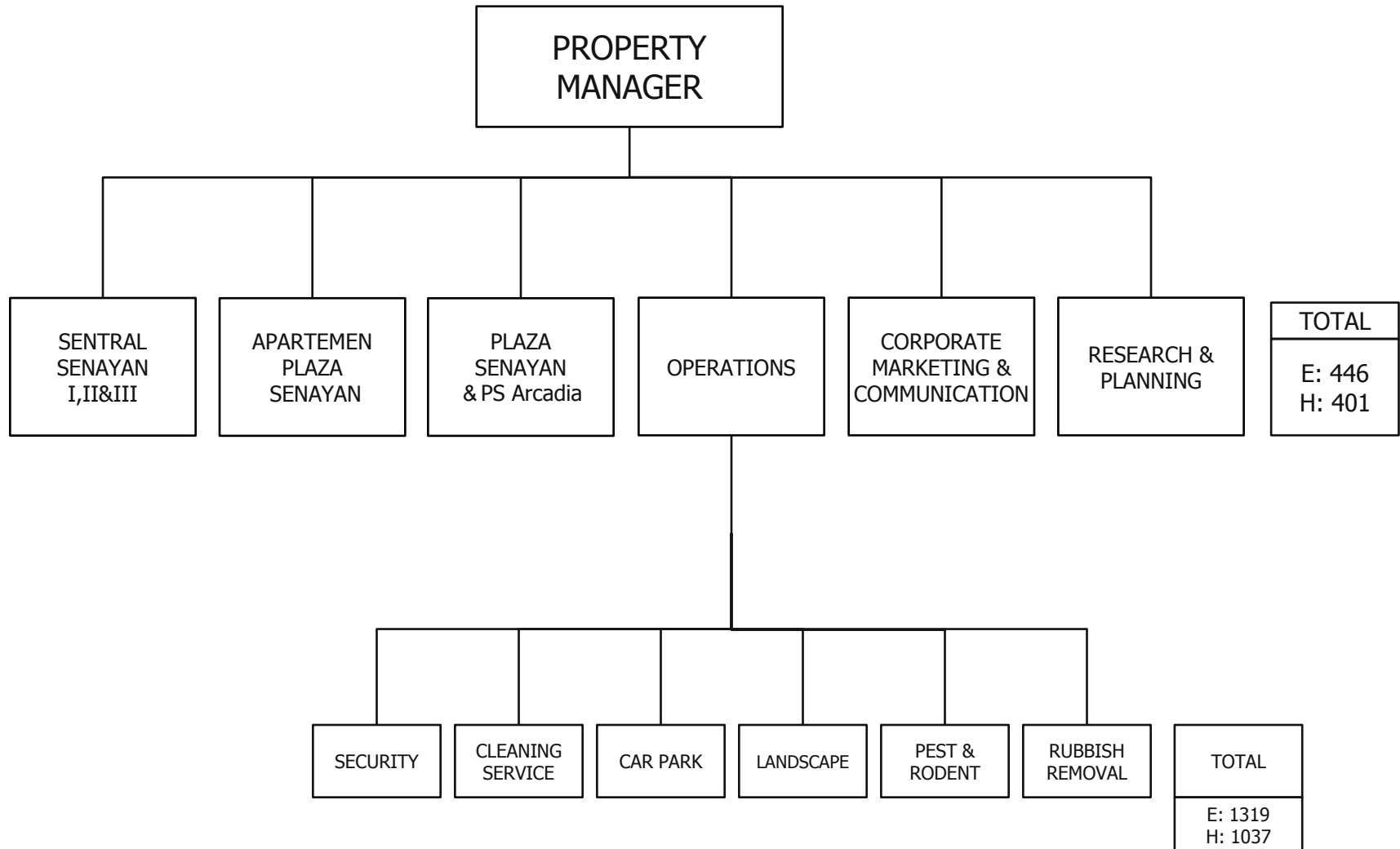
2. STS Organization



PT SENAYAN TRIKARYA SEMPANA



PROPERTY MANAGEMENT



3. Strategic Operations



3. Strategic Operations

(1) Shopping Center Performance

(2) Promotion Events

(3) Security

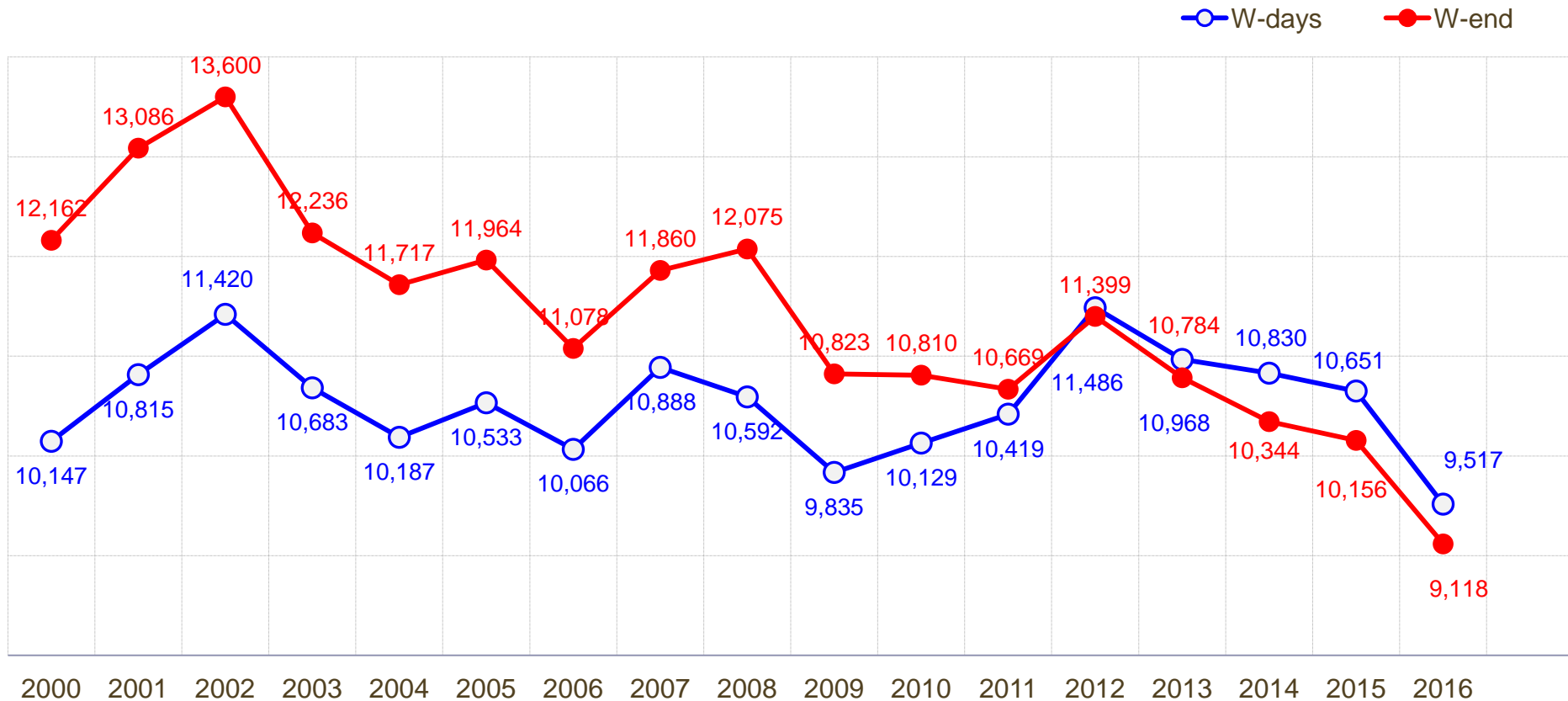
(4) Challenges



3. Strategic Operations - Shopping Center Performance

CAR PARK THROUGHPUT

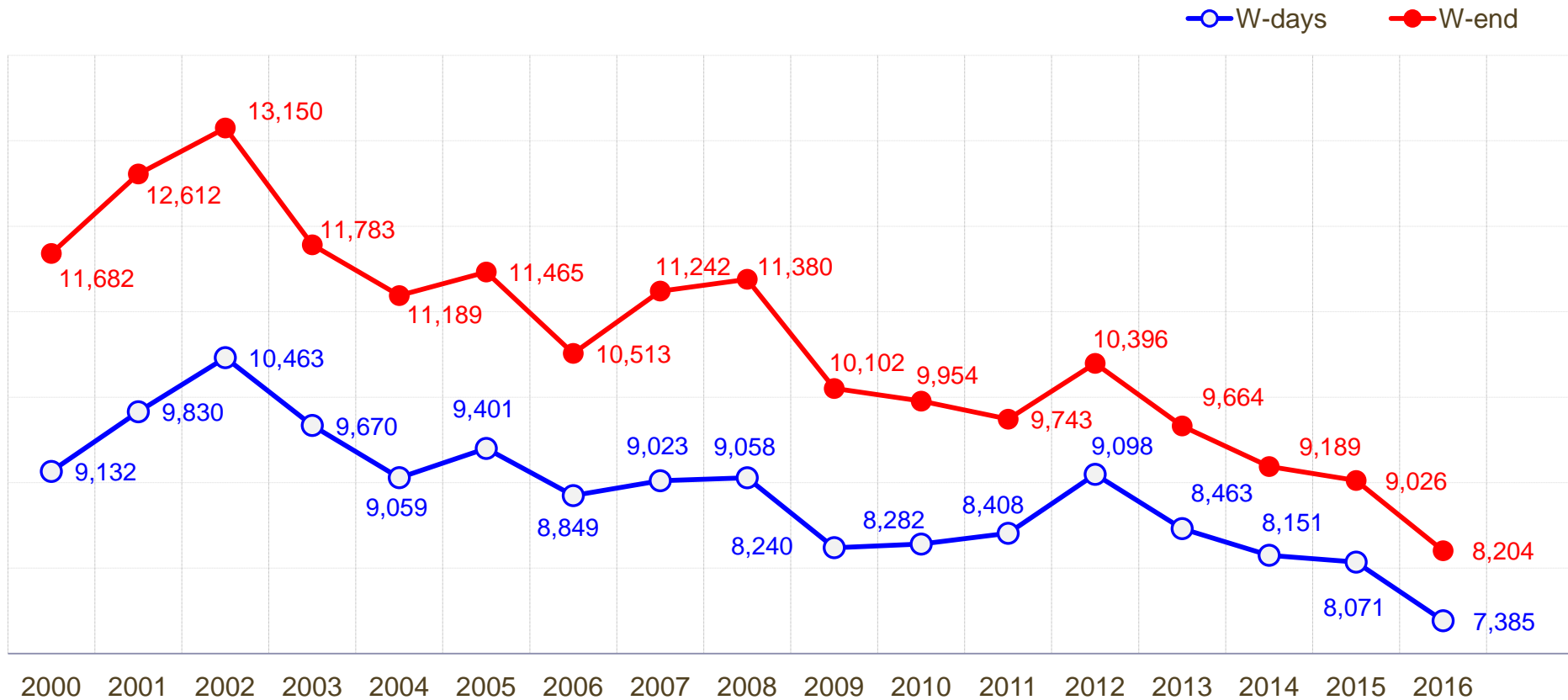
**Weekday and Weekend averages
(Including Car Permit)**



3. Strategic Operations - Shopping Center Performance

CAR PARK THROUGHPUT

Weekday and Weekend averages
(Excluding Car Permit)



3. Strategic Operations - Shopping Center Performance

YEAR	SALES		CARS TRAFFIC			SHOPPERS	
	Monthly (US\$ 1,000)	US\$/m2	Monthly	W-days	W-end	W-days	W-end
1995	21,841	554.05	154,864	5,823	8,044	20,963	33,463
1996	24,302	577.43	220,371	6,005	8,847	21,620	36,802
1997	25,485	602.84	236,356	6,544	9,342	23,558	38,861
1998	15,178	356.61	239,024	6,996	8,939	25,186	37,186
1999	14,464	197.20	256,565	7,448	9,685	26,813	40,290
2000	16,122	217.92	314,441	9,132	11,682	32,875	48,597
2001	15,953	209.77	337,254	9,830	12,612	35,388	52,466
2002	16,822	223.20	353,847	10,463	13,150	37,667	54,704
2003	14,552	190.91	323,181	9,670	11,783	32,878	49,017
2004	15,782	205.91	306,836	9,094	11,206	30,920	46,617
2005	14,706	195.25	313,989	9,401	11,465	38,544	61,796
2006	12,758	181.84	292,312	8,849	10,513	31,140	51,042
2007	15,448	196.21	304,223	9,033	11,257	39,276	51,778
2008	14,629	182.48	308,980	9,058	11,380	30,258	46,226
2009	14,262	178.48	276,550	8,240	10,102	27,523	41,033
2010	13,488	175.53	274,483	8,282	9,954	25,402	33,332
2011	16,629	212.57	274,143	8,408	9,743	27,615	36,570
2012	17,640	226.49	294,927	9,098	10,396	30,120	41,680
2013	16,955	215.59	273,931	8,463	9,664	25,706	32,515
2014	17,046	213.96	262,462	8,151	9,189	28,892	30,788
2015	16,086	212.40	258,644	8,071	9,026	26,173	28,117
2016	12,416	160.98	236,510	7,385	8,204	24,156	26,456



3. Strategic Operations

(1) Shopping Center Performance

(2) Promotion Events

(3) Security

(4) Challenges



3. Strategic Operations - Promotion Events



3. Strategic Operations - Promotion Events



3. Strategic Operations - Promotion Events



Palm Award
(fashion design)

At Christmas time



Khatulistiwa Literary Award



Unicef



3. Strategic Operations

(1) Shopping Center Performance

(2) Promotion Events

(3) Security

(4) Challenges



3. Strategic Operations - Security



Riots in 1998
From rooftop of apartment tower



3. Strategic Operations - Security



3. Strategic Operations - Security



3. Strategic Operations - Security



Presidential election in 1999
Street in front of Plaza Senayan



3. Strategic Operations - Security



3. Strategic Operations

(1) Shopping Center Performance

(2) Promotion Events

(3) Security

(4) Challenges



1st Challenges

- Economic crisis at the end of 1997
- Devaluation of IDR
- Economic recession
- Riots in May 1998, political and social upset, demonstrations and disorder, security concerns
- Reduction of middle class / Income bracket
- Political and economic uncertainty
- Very conservative investments

2nd Challenges

- International terrorism - Bali (2002), Marriott hotel (2003), Australian Embassy (2004), Bali (2005)
- Anxiety about the safety of citizens and tenants
- Decrease in the number of visitors
- High level security vs Business interests of tenants and owner

3rd Challenges

- Presidential and legislative elections in 2004
- Increasing number of shopping center with limited consumer market
- Maintaining experienced staff
- Maintaining top position in the market
- Loss of prospective tenants

2nd Challenges repeats

- Recurrence of international terrorism
 - Ritz Carlton / Marriott hotel simultaneous bombings (July 2009)
 - Suicide at the center of Jakarta, ISIL (January 2016)

The End

