

**STRATEGI PERTUMBUHAN SISTEM PELABUHAN:
SATU KAJIAN TERHADAP PELABUHAN-PELABUHAN
ACEH DI INDONESIA**

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**DOCTOR OF PHILOSOPHY
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**STRATEGI PERTUMBUHAN SISTEM PELABUHAN:
SATU KAJIAN TERHADAP PELABUHAN-PELABUHAN
ACEH DI INDONESIA**

Oleh

MUHAMMAD SUBHAN

**Tesis dikemukakan kepada Kolej Undang-Undang, Kerajaan dan
Pengajian Antarabangsa untuk memenuhi keperluan ijazah Doktor
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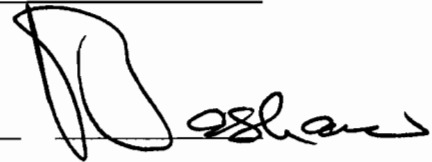
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PENGAKUAN

“Saya akui karya ini adalah hasil kerja saya sendiri kecuali nukilan dan ringkasan yang tiap-tiap satunya telah saya jelaskan sumbernya”

15 Ogos 2010

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KEBENARAN MENGGUNA

Dalam membentangkan tesis ini, bagi memenuhi syarat sepenuhnya untuk ijazah Doktor Falsafah (PhD) Universiti Utara Malaysia, saya bersetuju bahawa Perpustakaan Universiti boleh secara bebas membenarkan sesiapa saja untuk memeriksa. Saya juga bersetuju bahawa penyelia saya atau jika tiada kebenaran beliau, Penolong Naib Canselor, diberi kebenaran untuk membuat salinan tesis ini dalam sebarang bentuk, sama ada keseluruhannya atau sebahagiannya, bagi tujuan kesarjanaan. Adalah dimaklumkan bahawa sebarang penyalinan atau penerbitan atau kegunaan tesis ini sama ada sepenuhnya atau sebahagian daripadanya bagi tujuan keuntungan kewangan, tidak dibenarkan kecuali setelah mendapat kebenaran bertulis dari saya. Juga dimaklumkan bahawa pengiktirafan harus diberi kepada saya dan Universiti Utara Malaysia dalam sebarang kegunaan kesarjanaan terhadap sebarang petikan daripada tesis saya.

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ABSTRAK

Tujuan utama kajian ini adalah mengkaji formulasi dan implementasi strategi sistem pelabuhan-pelabuhan di Aceh untuk tumbuh dan berkembang dalam persekitaran industri dan ekonomi global yang berubah cepat dan juga persekitaran industri pelabuhan kawasan Selat Melaka yang berdaya saing tinggi dan mengenal pasti serta memahami strategi-strategi pertumbuhan yang berkesan dan mampan yang dapat diterapkan untuk pelabuhan-pelabuhan di Aceh dan juga di tempat-tempat lainnya yang memiliki ciri-ciri dan keadaan yang serupa dengan pelabuhan-pelabuhan Aceh. Kajian ini didorong oleh kenyataan dan juga hasil ulasan literatur yang mendapati bahawa banyak pelabuhan-pelabuhan regional Indonesia terutama di Aceh mengalami kesukaran untuk tumbuh dan berkembang, padahal pelabuhan-pelabuhan di Aceh sejak dari dahulu lagi telah dikenal mempunyai potensi besar untuk berkembang dan maju menjadi pelabuhan utama di rantau Asia. Namun begitu, kondisi semasa menunjukkan bahawa semua keunggulan yang pernah dimiliki oleh pelabuhan Aceh tidak dapat dipertahankan (*unsustainable*) untuk pertumbuhan. Pelabuhan Aceh sesungguhnya secara pengurusan strategi dapat kita katakan mengalami sindrom “*strategy decay*” untuk tempoh waktu yang cukup lama. Ini dapat disebabkan oleh masalah formulasi strategi yang tidak tepat atau pelaksanaan strategi yang buruk ataupun disebabkan oleh mekanisma pertumbuhan pelabuhan yang tidak jelas, atau kekurangan strategi yang jitu dan pelbagai. Menggunakan kaedah campuran (*mixed method*) yakni gabungan kuantitatif dan kualitatif, kajian ini mengkaji pandangan-pandangan pihak berkuasa pelabuhan Aceh yang dalam hal ini direpresentasikan oleh badan-badan kerajaan, badan autoriti dan pengurusan pelabuhan, perunding pakar dan akademik, dan asosiasi pengguna mengenai kondisi semasa pelabuhan, faktor-faktor yang dipandang menyumbang kepada pertumbuhan pelabuhan, lokasi strategik pelabuhan dan konsep serta pelaksanaan strategi-strategi pelabuhan untuk mencapai pertumbuhan. Hasil kajian menunjukkan bahawa pertumbuhan pelabuhan-pelabuhan Aceh berada dalam kondisi yang kritikal walaupun dipandang masih mempunyai potensi besar untuk tumbuh dan berdaya saing. Oleh itu diperlukan satu transformasi strategi dan urus-tadbir pelabuhan untuk menaikkan daya kompetitif sistem pelabuhan Aceh. Pelabuhan-pelabuhan Aceh mesti dikembangkan sebagai satu sistem yang bersepadu sama ada sebagai bahagian dari rangkaian pengangkutan logistik mahupun sebagai bahagian dari kumpulan pelabuhan. Kajian ini mencadangkan dua lokasi pelabuhan strategik iaitu Sabang dan Lhokseumawe untuk berfungsi sebagai *transshipment* dan *hub* eksport-import. Kajian ini juga mencadangkan beberapa konsep atau model pengembangan pelabuhan Aceh dengan mengambil kira hierarki pelaksanaan strategi pertumbuhan pada setiap peringkat daya saing.

ABSTRACT

The main objective of this study is to investigate the characteristics of Aceh's ports and their contributions to the regional port industries, and to develop strategic approaches to better position those ports in the dynamic and competitive environment along the Malacca strait. This study is motivated by the facts that ports in Aceh have had difficulties to compete with other regional ports, despite their strategic position along the world busiest shipping lane of the Malacca strait. Using a mixed method that is a combination of quantitative and qualitative approach, this study examines perspectives from relevant parties such as government officials, port authorities and managements, experts, academicians and consultants, and port user associations. Data and information are analysed using SWOT concentrating on the conditions of the ports, perceived factors contributing to port growth, port strategic location, and implementation of the concepts and strategies for port growth. In particular, this study focuses on business aspects of the ports while to a lesser extent also highlights political motivations of the ports stakeholders. The findings show that it is critical to totally reform the ports' strategic development and operation in order to achieve sustainable competitive advantage and growth. In addition, Aceh ports should be developed as an integrated port system, taking into consideration the concept of ports as both an element of logistic chain system and as a member in a port group that serves same hinterlands. This study suggests the use of Sabang and Lhokseumawe as the transshipment and hub ports for Aceh, while all other Aceh ports should be developed based on consistent strategic plannings as the supporting ports for the main terminal ports in Sabang and Lhokseumawe. Through these strategic approaches, Aceh ports will be able to accelerate the achievement of its ultimate goal of having the same level playing field with other main ports in the region.

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Muhammad Subhan. (2010). *Urgensi Badan Otorita Pelabuhan Aceh*. Harian Serambi Indonesia: 26 Mei 2010. Media Bercetak dan Online: <http://www.serambinews.com/>

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SENARAI SINGKATAN

3PL	Third Party Logistics Providers
ADB	Asian Development Bank
AHP	Analytic Hierarchy Process
APEC	Asia Pacific Economic Cooperation
ASEAN	Association of South East Asian Nations
BAPPEDA	Badan Perencanaan Pembangunan Daerah
BPKS	Badan Pengusahaan Kawasan Sabang
BPPS	Badan Pengusahaan Daerah Perdagangan & Pelabuhan Bebas Sabang
BPS	Badan Pusat Statistik Republik Indonesia
BRR	Badan Rehabilitasi dan Rekonstruksi Aceh dan Nias
BUMN	Badan Usaha Milik Negara
COSCO	China Ocean Shipping (Group) Company
Dephub	Departemen Perhubungan Republik Indonesia
Dishub	Dinas Perhubungan [Provinsi Aceh]
DKI	Daerah Khusus Ibukota [Provinsi Jakarta]
DKP	Departemen Kelautan dan Perikanan Republik Indonesia
DWT	Deadweight Tonnes
EDI	Electronic Data Interchange
FEU	Forty-foot Equivalent Unit
FPZ	Free Port Zone
FTZ	Free Trade Zone
GAM	Gerakan Aceh Merdeka
GDP	Gross Domestic Products
IDR	Indonesian Rupiah
IFC	International Finance Corporation
IMO	International Maritime Organization
IMT-GT	Indonesia-Malaysia-Thailand Growth Triangle
INPRES	Instruksi Presiden Republik Indonesia

KADIN	Kamar Dagang dan Industri (<i>Chamber of Commerce</i>)
KAPET	Kawasan Pengembangan Ekonomi Terpadu
KMO	Kaiser-Meyer-Olkin [pengukuran, ujian]
LWS	Low Water Springs atau Low Water at Spring Tide
M&A	Mergers & Acquisitions
Migas	Minyak dan Gas
MOT	Ministry of Transportation Malaysia
MoU	Memorandum of Understanding
MPA	Maritime and Port Authority of Singapore
MSC	Mediterranean Shipping Company
PCA	Principal Component Analysis
PDRB	Produk Domestik Regional Bruto
PELINDO	Pelabuhan Indonesia [syarikat]
PEMKO	Pemerintah Kota
PP	Peraturan Pemerintah Republik Indonesia
PSA	Port of Singapore Authority (PSA) International Pte Ltd
PT	Perseroan Terbatas [bentuk syarikat]
PTP	Pelabuhan Tanjung Pelepas Malaysia
RTR	Rencana Tata Ruang
R&D	Research and Development
SDM	Sumber Daya Manusia
SHI	Samsung Heavy Industries
SISTRANAS	Sistem Transportasi Nasional Indonesia
SPSS	Statistical Package for Social Sciences
SWOT	Strength-Weakness-Opportunity-Threat [analisis]
TATRALOK	Tatanan Transportasi Lokal
TATRANAS	Tatanan Transportasi Nasional
TATRAWIL	Tatanan Transportasi Wilayah
TEU	Twenty-foot Equivalent Unit
TMSP	Tatanan Makro Strategis Perhubungan
TNC	Trans-National Corporations
TSS	Traffic Separation Scheme

UKC	Under-Keel Clearance
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCAP	United Nations Economic & Social Commission for Asia and the Pacific
USA	United States of America
USD	US Dollar
UU	Undang-Undang Republik Indonesia
VLCC	Very Large Crude Carrier
WFP-LSU	World Food Programme – Logistics Support Unit
WTO	World Trade Organization

BAB 1

PENDAHULUAN

“Dialah (Allah) yang menjalankan kamu di darat dan di laut (dengan diberi kemudahan menggunakan pelbagai jenis kenderaan) sehingga apabila kamu berada di dalam kapal, dan kapal itu pula bergerak laju membawa muatan-muatannya dengan tiupan angin yang baik, dan mereka pun bersukacita dengannya...”

(Al-Qur'an, Surah Yunus: 22)

1.1 Latar Belakang Kajian

“If one does not know to which port one is sailing, no wind is favorable.”

Lucius Annaeus Seneca (c. 4 BC – AD 65)

Dalam beberapa dekad terakhir, dunia telah pun menyaksikan perubahan yang cepat dan ketara dari pergerakan perdagangan global dan juga peningkatan luar biasa terhadap keperluan barangan atau apa yang diperkatakan sebagai ‘*globalizing marketplace*’ oleh Robinson (2002) atau apa yang dimaksud sebagai ‘globalisasi logistik pelabuhan’ menurut istilah UNCTAD (2008, 2007). Kenyataan ini terutama sekali dipacu oleh kepesatan pertumbuhan penduduk dunia, permintaan tinggi dan terus meningkat terhadap barangan, dan peningkatan kesejahteraan ekonomi serta penemuan baru (inovasi) dalam bidang teknologi maritim dan pengangkutan serta logistik.

Dalam proses globalisasi tersebut, pelabuhan laut, sebagaimana dinyatakan oleh UNCTAD (2008, 2007), Alderton (2005), dan UNESCAP (2005), memainkan peranan yang sangat penting dalam perdagangan maritim dan pengangkutan logistik yang mana peranan serta kepentingannya akan terus kekal di masa depan. Pelabuhan

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