

PROMOTING THE SABANG–PHUKET–LANGKAWI TOURISM BELT UNDER THE IMT-GT SUBREGIONAL COOPERATION FRAMEWORK

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<http://doi.org/10.46754/jssm.2024.12.006>

Received: 15 November 2023

Accepted: 12 June 2024

Published: 15 December 2024

Abstract: The subregional cooperation of Indonesia, Malaysia, and Thailand Growth Triangle involves five economic corridors. The Ranong–Phuket–Aceh Economic Corridor or EC5 is one of the five corridors involving the tourism industry. EC5 is predominantly a maritime corridor connecting northern Sumatra and southwestern Thailand with the aim of exploiting tourism potential. Unfortunately, Sabang in Aceh has no significant maritime connection with Phuket. Instead, Phuket has an existing cruise line connection with Langkawi in Malaysia. However, Malaysia is not included in the EC5. The inclusion of Langkawi in the corridor will exploit the potential of the cruise tourism industry between Sabang and Phuket. Langkawi is on the international cruise line route along the Straits of Malacca. Langkawi island could be a new link to create the Sabang–Phuket–Langkawi (SAPHULA) Tourism Belt or Marine Tourism Triangle. This study investigated the SAPHULA corridor's potential impact on Langkawi, particularly Sabang's cruise tourism industry, and maritime tourism in general. Findings indicate that the proposed connectivity between Sabang and Langkawi is more government-driven, while a private-public collaboration is crucial for the fruition of the SAPHULA tourism belt.

Keywords: Connectivity, cruise tourism, economic corridor, IMT-GT.

Introduction

A memorandum of understanding (MoU) on Marine Tourism Triangle Cooperation was signed in April 2017 to establish a favourable cruise line route connecting Langkawi in Malaysia, Phuket in Thailand, and Sabang in Indonesia (Jakarta Globe, 2017). The MoU, which was signed during the World Travel and Tourism Council 2017 Global Summit in Bangkok, aimed to help develop the Triangular Sailing Passage between these three popular tourist spots (The Jakarta Post, 2017). Cross-border tourism between Langkawi and southwestern Thailand had already been established by the maritime routes between Langkawi and Phuket (Ko Lipe) and Satun (Tammalang Pier). Thus far, there are no maritime links between Langkawi and Sabang.

The maritime link between Sabang and Phuket is part of the Ranong–Phuket–Aceh Economic Corridor (EC), also known as the EC5. EC5 is one of five Indonesia–Malaysia–Thailand Growth Triangle (IMT-GT) ECs identified by

the Centre for Indonesia–Malaysia–Indonesia Subregional Cooperation, the remaining ECs are Extended Songkhla–Penang–Medan, Straits of Malacca, Banda Aceh–Medan–Pekanbaru–Palembang, and Melaka–Dumai (CIMT, 2011) (Figure 1). Each EC has distinct characteristics based on its geographic location and comparative advantage. The EC's approach is to improve connectivity, promote industrial clusters and cross-border production networks, and maximise economic network externalities beyond and along the identified corridors (CIMT, 2011). The IMT-GT corridors reflect a convergence of regional economic integration and inclusive growth (CIMT, n.d.).

The EC5 connects ports in northern Sumatra, primarily Ulee Lheue and Malahayati in Aceh Province with southern Thailand along the western coast adjacent to the Andaman Sea to capitalise on the tourism potential (CIMT, 2011). Aceh Province in Sumatera is part of



Figure 1: The five IMT-GT economic corridors
Source: CIMT (2011)

the corridor with Banda Aceh (the capital) and Sabang (We Island), as maritime gateways and tourism nodes, respectively.

EC5 does not cover any nodes in northern Malaysia, which neighbouring Aceh and Phuket. Hence, to create the SAPHULA tourism route, Langkawi Island should be part of the EC5 to harness the potential of the cruise tourism industry between Phuket and Aceh. Besides that, Langkawi is also on the international cruise line route along the Straits of Malacca. Thereby,

Langkawi Island could connect Sabang and Phuket as a new link. The distance between Phuket and Langkawi is about 243 kilometres or 131 nautical miles, while Langkawi and Sabang are about 558 kilometres or 301 nautical miles (Google, n.d.).

The global cruise industry generates approximately \$150 billion in economic activities annually (CLIA, n.d.). Therefore, Malaysia has set cruise tourism as a key area in its tourism development plans. Malaysia

developed this industry under the Economic Transformation Programme and established the Malaysia Cruise Council, a policymaking advisory committee. Representatives from public and private sectors are on the committee, including the Ministry of Tourism, Arts and Culture, the Ministry of Transport, and several local port authorities (Pemandu Malaysia, 2010). As for Langkawi, the main goal of the Langkawi Tourism Blueprint (2016-2020) is to promote the island as a world-class tourism destination with cruise tourism being one of the market segments to be promoted.

The aim of this study is twofold. First, it intends to examine the feasibility of connecting Sabang and Langkawi to expand the Ranong–Phuket–Aceh Economic Corridor, and second, to assess the potential development of cruise tourism under the proposed SAPHULA Tourism Belt.

Literature Review

There is a lack of studies on cruise tourism in Malaysia, and Penang is frequently used as a case study (Chong, 2015; Jeffrey, 2020; Munira, 2020; Kwong, 2021). This is due to the Port of Swettenham being Penang's port of call, which is a popular stopover for international cruise ships passing through the Straits of Malacca. Many studies on the tourism industry tend to focus on the ecotourism sector, which the government has prioritised under the National Ecotourism Plan 2016-2025 (Ministry of Tourism and Culture Malaysia, 2015).

According to Chong (2015), Malaysia's cruise industry is still growing. Chong (2015) used a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis to explore the potential of strategic decision-making and planning to develop Malaysia's cruise tourism. He found notable strengths such as a growing cruise tourism market and the government's upgraded port infrastructure. He also highlighted the weaknesses such as oligopolistic competition and the negative perception of Malaysian cruises being overly gambling-oriented rather than for holiday purposes. As for opportunities, Chong

(2015) identified three areas, namely increased spending on travel and cruising, exemption from Malaysia's Cabotage Policy for all international cruises, and strong initiatives and support from the Malaysian government. And for threats, he noted that piracy and safety could pose risks for Malaysia's cruise business.

Meanwhile, Jeffrey (2020) noted that the recent COVID-19 pandemic has significantly challenged Penang's cruise industry development. For many decades, Penang has been relying on the tourism sector. Penang State Government started to promote Penang as a port of call for cruise liners instead of merely being a transit destination to adapt to the current situation. This initiative will allow tourists to board cruise liners directly from Penang. Therefore, developing well-managed attractions for domestic and international tourists is crucial for the Penang State Government. Locally-themed cruise excursions could become an example of a product that can be offered to world-class liners.

According to Kwong (2021), cruise tourism is one of the national key economic areas to increase the number of tourists to Malaysia. The growth of international cruise tourism in Malaysia is a significant contributor to the tourism industry. Kwong (2021) used SWOT as an analytical tool. He identified some key factors that affect the growth of cruise tourism in Malaysia, including modern infrastructure, affordable exchange rates, friendly people, and a stable government, which makes Malaysia an ideal stopover. These appealing factors are complemented by cruise terminals near local attractions in Langkawi, Penang, Port Klang, and Melaka such as beaches, cultural sites, eateries specialising in regional cuisine, and ecotourism. Penang Port is now reasserting its role as a port of call, serving as a destination for international cruise liners and as a catalyst for the tourism industry's development.

Munira (2020) intended to evaluate cruise tourism perceptions and impacts on tourism-related businesses in Malaysia from various perspectives, including relevant stakeholders at

the destination, businesses, and cruise passengers to determine whether cruise tourism can benefit local businesses at the cruise destination port. The case study examined Swettenham Pier Cruise Terminal in George Town, Penang, one of Malaysia's most popular stop-over cruise ports. Quantitative data gathered via a survey questionnaire investigated passengers' perceptions and behaviour at the destination. The study's main finding is that collaboration between the destination's stakeholders and tourism-related businesses is critical in attracting and accommodating cruise lines and passengers and generating more beneficial outcomes for the destination.

Meanwhile, from an Indonesian point of view, there are not many studies on cruise tourism in Sabang. Several studies (Rani *et al.*, 2017; Chan *et al.*, 2019; Nanda, 2019) examined appropriate strategies for developing cruise and yacht tourism. Chan *et al.* (2019) identified some of the strengths and weaknesses of Sabang as a tourist destination. The strengths include the dock terminal being located in the centre of Sabang City, the one-stop service centre for check-in and check-out, no Value Added Tax (VAT) for yacht management and repair services, the existence of natural, historical, and archaeological attractions and the friendly weather throughout the year. However, Sabang still has several weaknesses, including no significant effort in providing various facilities for sailing ship service, limited sailboat maintenance and repair facilities, no Sabang Yacht Club, and problems with water treatment and solid waste disposal. Therefore, Chan *et al.* (2019) suggested that Sabang implement an aggressive strategy to optimise its strengths and seize the opportunities available.

In line with Chan *et al.* (2019), a study by Nanda (2019) also highlighted that an aggressive strategy is a more appropriate way of developing Sabang for cruise tourism. The difference is that Nanda emphasises opportunities, not strengths. The opportunities include natural resources as a potential tourism package, culture as a worthy tourist attraction, local tourism businesses as

important actors in managing cruise ship visits, and government support.

Meanwhile, Rani *et al.* (2017) suggested several priority locations for developing tourism infrastructure in Sabang. Based on the results of Analytic Network Process (ANP) calculations, Teupin Layeu, Gapang, and Rubiah Island have the highest score of priorities to be developed with accommodation infrastructure, followed by Teupin Layeu for parking facilities and Zero Kilometre Monuments for land roads.

All of the above studies had yet to discuss IMT-GT subregional cooperation as an important factor in the development of cruise and yacht tourism in Sabang. Therefore, this study provides a new perspective, whereby tourism development is carried out unilaterally by a country and can be carried out with other countries through collaboration and cooperation.

Methodology

This qualitative research used secondary data published by government-owned statistical agencies in IMT-GT member states such as Malaysia and Indonesia. Secondary data and information were also obtained from the Asian Development Bank and the Center for IMT-GT Subregional Cooperation. Meanwhile, primary data were gathered from interviews with several informants from subnational, national, and subregional agencies and actors. The informants consist of government officials from Indonesia and Malaysia, the local chamber of commerce and IMT-GT's Joint Business Council, tourism operators, as well as academicians from local universities. With informants' consent, recorded interviews are processed into transcripts and field notes. Both primary and secondary research are then used to support the analysis of the two main objectives of this paper.

The study spanned from 2016 to 2018, before the COVID-19 pandemic. This study did not investigate the COVID-19 pandemic's expected impact on cruise tourism because most countries had prohibited cruise ships from docking at their respective ports of call. As a

result, data on cruise ship tourist arrivals needed to be released by government-owned statistical agencies in the respective IMT-GT.

This study’s novelty is its exploratory analysis, which proposes connectivity between Sabang and Langkawi for strengthening integration under the EC5, in general, and SAPHULA, in particular. The study’s observation was intended to demonstrate the dynamism of the tourism industry in Sabang and Langkawi, which serves as the foundation for connecting the two islands. This study could serve as a basis for future research in the post-COVID-19 pandemic era.

Tourism Industry–Development Context

Tourism is one of the strategic pillars that will support IMT-GT to achieve its vision of becoming an integrated, innovative, inclusive, and sustainable subregion by 2036. This 2036 vision is a shared strategy to promote growth through greater regional economic integration and innovation and conserve and invest in IMT-GT’s natural capital for the well-being of the present and future generations (CIMT, 2017).

Hence, IMT-GT intends to implement several tourism promotion and development strategies to achieve the above vision. The first is to improve connectivity between strategic areas to support selected thematic cross-border tourism circuit development. The second is to enhance the sustainability, inclusiveness

and competitiveness of the subregion as a destination, and lastly, market the region as a single destination. Cruise tourism is one of the tourism sectors prioritised in the IMT-GT region (CIMT, 2016b).

Langkawi

Langkawi Island is 526 km², accounting for 5% of Kedah’s total area (Figure 2). The island is one of Kedah’s 12 districts with six subdistricts (Kuah, Ayer Hangat, Ulu Melaka, Bohor, Padang Matsirat, and Kedawang). Langkawi had a total population of nearly 110,000 people in 2018 with a population density of 209 people per km².

The tourism industry drives Langkawi’s economy and contributes significantly to Kedah state’s gross domestic income (GDP). The island, which obtained its duty-free status in 1987 is a popular destination among local and international tourists. The income from the tourism sector was \$0.4 billion in 2018, contributing 8% to Kedah’s GDP.

Agriculture also contributes to Langkawi’s economy. The main crops cultivated are rubber and paddy, which accounted for more than 80% of total farmland in 2018. Mixed crops rank second (15%), followed by aquaculture and livestock (2%, respectively) (Plan Malaysia, 2020).

The Langkawi Development Authority, which was established in 1990 is in charge of developing Langkawi’s tourism industry. The

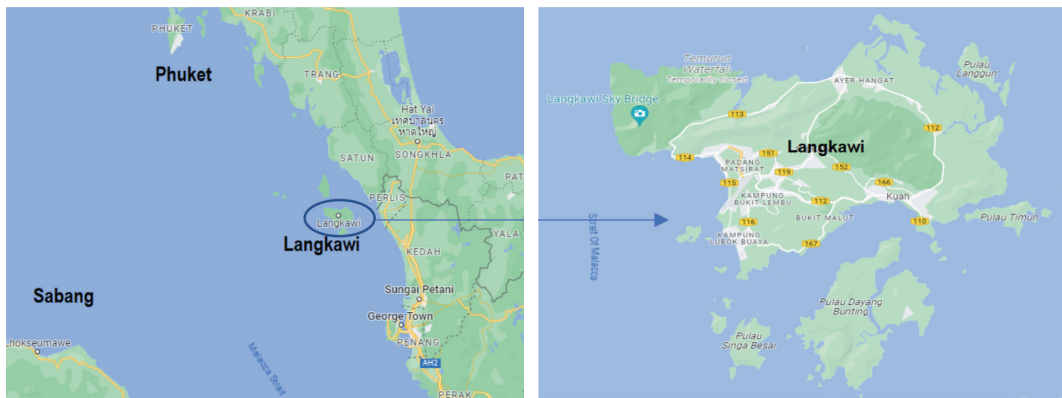


Figure 2: Map of Langkawi Island
 Source: Google map (modified by authors)

Langkawi Tourism Blueprint 2011-2015 and 2016-2020 determines the development path of its tourism industry. The blueprints aim to transform the island into one of the world's top 10 islands and ecotourism destinations. Its strategic location on the cruise line routes in the Andaman and Straits of Malacca makes it an important port-of-call and a cruise tourist destination. Langkawi Island is also part of the Straits Riviera route proposed by the Government of Malaysia (Pemandu Malaysia, 2010; Travel Weekly Asia, 2015).

Langkawi was accorded the UNESCO Global Geopark status in June 2007. The Langkawi Geopark comprises Machincang Cambrian Geoforest Park, Kilim Karst Geoforest Park, and Dayang Bunting Marble Geoforest Park. These Geoforest Parks are also local and international tourist destinations, and they have strengthened the ecotourism industry in Langkawi (Langkawi Geopark, n.d.).

Cruise tourism is one of the key focus areas of the Malaysian Government's tourism development plans mentioned in the Economic Transformation Programme. Malaysia established the Malaysia Cruise Council, a policymaking advisory committee comprising representatives from public and private sectors, including related ministries and local port authorities. There are also plans to create a Straits Riviera cruise corridor along the Straits of Malacca, connecting six major ports: Langkawi, Penang, Port Klang, Melaka, Kuching, and Kota Kinabalu (Pemandu Malaysia, 2010).

Sabang

Sabang refers to two administrative terms. First, the Sabang Zone is a free trade and free port zone. The zone covers Sabang City (Weh Island, Klah Island, Rubiah Island, Seulako Island, and Rondo Island), part of Aceh Besar Regency (Breuh Island, Nasi Island, and Teunom Island), as well as the surrounding small islands (Indonesian Law No. 37, 2000). BPKS, a special agency under the Indonesian president, manages the Sabang Zone.

Second, Sabang, as a city, refers to a municipality in Aceh Province that covers a 122.13 km² area (BPS, 2019). It comprises two districts, namely Sukajaya and Sukakarya, with 18 *gampong* (villages) and 7 *mukim* (habitations). Located between the Straits of Malacca and the Andaman Sea, Sabang City enjoys geographical proximity to Langkawi, northern Malaysia and Phuket, southwestern Thailand (Figure 3).

Sabang City is administered by the Government of Sabang City, where its residents vote for their mayor through direct elections every five years. The population of Sabang City was 34,571 in 2018, an increase of 1.8% from 2017. The population density in Sabang city in 2018 was 283 people per km² (Table 3).

Sabang City's economy in 2018 was driven by the construction industry (33%), public administration and defence (16%), and wholesale and retail trade (15%). Meanwhile, tourism-related industries (accommodation and food service) only marginally contributed to the economy (4%). Nonetheless, in 2017,

Table 1: Selected socioeconomic indicators for Langkawi (2018)

Selected Macroeconomic Indicators	2018
– Population ('000)	109.8
– Land Area (square kilometre)	526
– Population Density (population/square kilometre)	209
– Revenue from Tourism (\$ billion)*	0.4 (2018) 1.6 (2014)
– Monthly Household Gross Income (median, \$)	1,232
– Incidence of Poverty, %	3.8

Note: *Revenue from tourism in Langkawi was abstracted from Langkawi Annual Report 2014 and 2018

Source: Department of Statistics Malaysia (2020)

Table 2: Selected key tourism products in Langkawi

Tourism Sector	Tourism Product
Geopark	Machincang Cambrian Geoforest Park, Kilim Karst Geoforest Park, and <i>Dayang Bunting</i> Marble Geoforest Park
Nature Tourism	<i>Pulau Payar</i> Marine Park; <i>Cenang</i> Beach; <i>Telaga Tujuh</i> Waterfall; <i>Dayang Bunting</i> Island
Cultural Heritage	<i>Mahsuri's</i> Tomb (Padang Matsirat)
Manufactured	<i>Gunung Machinchang</i> Cable Car; Galeria Perdana, Langkawi Eagle Suare; Langkawi Underwater World; Langkawi Crystal; Telaga Harbor Park

Source: Compiled by authors

the government of Sabang City issued a vision statement that established maritime tourism as the foundation for its development from 2017 to 2022 (Government of Sabang City, 2017).

As of 2018, Sabang has 63 tourist attraction spots. This study divided the 63 tourist spots into categories based on natural and artificial factors. Nature-based tourism spots can be further

divided into land-based and marine-based. Likewise, artificial tourist spots can be divided into cultural heritage and modern artificial spots (Table 4).

BPKS and the Government of Sabang City continue to promote tourism development in their area. One of the targeted segments is cruise ship tourism. This sector can be a driving force

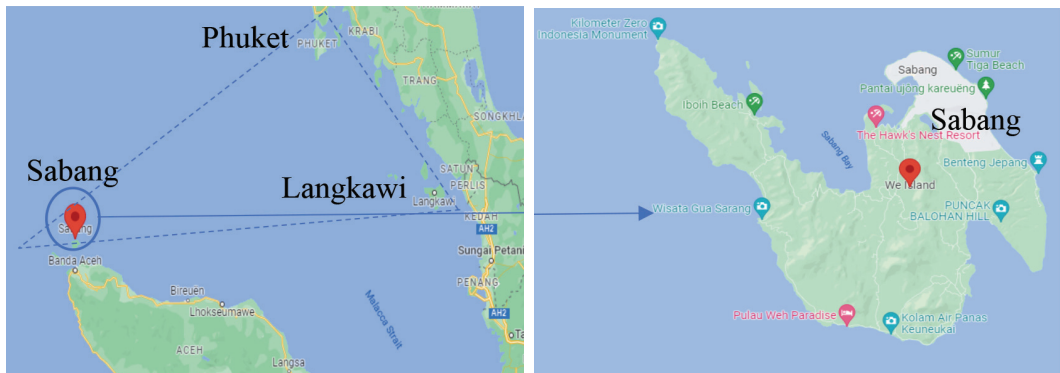


Figure 3: Map of Sabang, Aceh
Source: Google map (modified by authors)

Table 3: Selected socioeconomic indicators for Sabang (2018)

Selected Macroeconomic Indicators	2018
– Population (‘000)	34.6
– Land Area (square kilometre)	122.1
– Population Density (population/square kilometre)	283
– Gross Regional Domestic Product (GRDP) at Current market prices from accommodation and food service industry (IDR billion)	49.8 (2018) 38.4 (2014)
– GRDP based on the Current Market Prices per capita*	IDR40.4 million/US\$2,793
– Number of Poor People, %	16.31

Note: *using exchange rate US\$ 1 = IDR 14,481
Source: BPS (2019)

Table 4: Selected key tourism products in Sabang

Tourism Sector	Tourism Spots
Land-based Nature Tourism	Bango Waterfall, Keunekai Hot Spring, Keunekai Volcano, Jaboi Hot Spring, Jaboi Volcano, Gendang Stone, Iboih Forest, Rubiah Island, Sarang Cave, Pria Laot Waterfall, Klah Island, Lake Aneuk Laot, and Sabang Hill
Marine-based Nature Tourism	Pasir Putih Beach, Pasir Teungoh Beach, Keunekai Beach, Beurawang Beach, Jaboi Beach, Balohan Bay, Batee Gajah Beach, Atun Beach, Teupin Bube Beach, Ujong Kareung Beach, Sumur Tiga Beach, Tapak Gajah Beach, Gapang Beach, Calok Meunasah Beach, Teupin Layeu Beach, Teupin Serkui Beach, Teupin Reudeup Beach, Rubiah Island's Sea Garden, Serui Beach, Pria Laot Beach, Teupin Cirik Beach, Lhong Krueng Raya Beach, and Teupin Tongkang Beach,
Cultural Heritage	Aulia Tengu Dicermong's Tomb, Ujong Peunayong Fort, Japan Fort, Tapak Gajah Fort, Teuku Abbas House, Japan's Beheading Monument, Pria Laot's Tomb, Ujung Sekundur Sacred Cemetary, Tinjau Alam Fort, Baiturrahim Mosque, Pelor Warehouse, Jurong Keutapang Fort, Ujung Asam Fort, Japan Fort in Sabang Fair Street, Japan Fort near BPKS Office, and Kerkhop Cemetary
Manufacture/ Artificial Tourism	Salak Garden, I Love Sabang Monument, Kilometre 0 Monument, Jurong Putro Ijo Pool, Zwimbath, CT3 Dock, Sabang Fair, and CT1 Dock.

Source: BPS (2019)

for the entry of foreign tourists to Sabang. With limited access to international flights (currently only the Banda Aceh–Penang route), the arrival of cruise ships can boost foreign tourists who will spend their money there and drive the local economy of Sabang Island. Moreover, Sabang is located along international cruise lines and geographically close to famous cruise call points such as Phuket and Langkawi. The Sabang Authority has held several programmes/ activities to increase cruise ship visits, including the Sabang Marine Festival in 2015 and 2016, Sail Sabang in November–December 2017, and the IMT-GT Cruise Business Forum in October 2019. Therefore, IMT-GT's plan to develop the Sabang–Phuket–Langkawi tourism belt will align with the Sabang development plan.

Findings and Discussions

Langkawi

Tourist arrivals from Ko Lipe averaged nearly 21,000 annually from 2016 to 2018, accounting for 1% of total tourist arrivals at Kuah Jetty Terminal (Langkawi). Meanwhile, tourist arrivals from Satun (Tammalang Pier) averaged

78,000 annually, accounting for 3% of all passengers arriving at Kuah Jetty Terminal. The difference in total arrivals between Satun and Ko Lipe is determined by distance and transportation costs. Satun is closer to Langkawi Island than Koh Lipe in terms of distance. The journey from Phuket to Koh Lipe takes 4 hours, while the trip from Ko Lipe to Langkawi takes 1 hour and 30 minutes. The ferry ride from Langkawi to Satun (Tammalang) takes only 1 hour and 15 minutes on high-speed boats (Figure 4).

Even though Phuket's contribution to total tourism arrivals in Langkawi was small, these tourist arrivals showed an increasing trend with a high growth rate of 76% per year from 2016 to 2018, in contrast to arrivals from Satun, which showed a negative 3% trend (Table 5). This demonstrates the immense potential for increasing cross-border tourism between Phuket and Langkawi.

The number of foreign tourists visiting Kedah (including Langkawi) from 2014 to 2017 was 1.3 million per year, compared to 2.4 million for local tourists. Langkawi Island receives 96% of all foreign visitors to Kedah, compared to 4% for the rest of the state (Table 6). In other words,

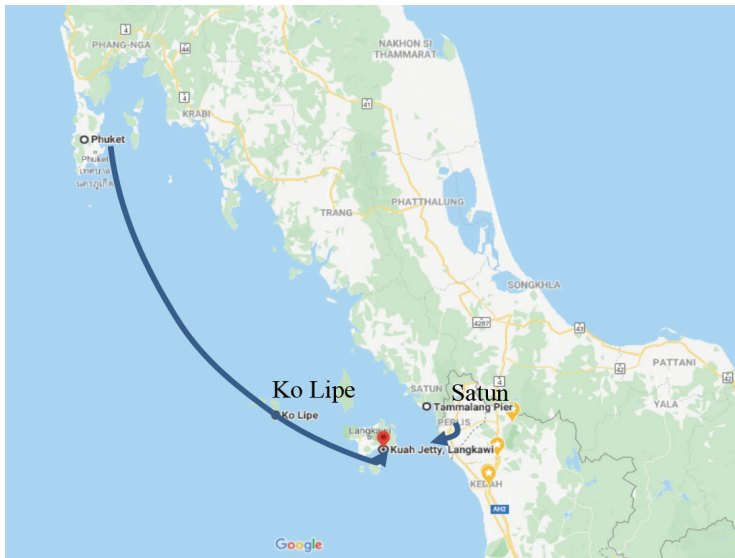


Figure 4: Ferry route: Phuket, Koh Lipe and Satun to Kuah jetty terminal
 Source: Google map (modified by authors)

Table 5: Tourist arrivals by origin in Kuah jetty terminal, 2016-2018 ('000 passengers)

Arrivals	2016	2017	2018	Average (2016–2018)	Share to Total Passengers	CAGR (2016–2018), %
Domestic	2,077	2,002	1,941	2,007	95	(3)
Satun	97	70	68	78	4	(17)
Ko Lipe, Phuket	8	28	26	21	1	76
Subtotal	2,182	2,099	2,035	2,106	100	(3)

Notes: () = negative, CAGR = compound annual growth rate
 Source: Maritime Department of Malaysia (2019)

Table 6: Tourist arrivals to mainland Kedah and Langkawi, 2014–2017

Year	Domestic Tourists (million)			Foreign Tourists (million)			Total Tourists (Domestic and Foreign)
	Mainland Kedah	Langkawi Island	Subtotal	Mainland Kedah	Langkawi Island	Subtotal	
2014	1.1	1.0	2.1	0.05	1.2	1.2	3.3
2015	1.0	1.3	2.3	0.05	1.2	1.2	3.5
2016	1.0	1.4	2.5	0.05	1.2	1.3	3.8
2017	1.0	1.6	2.6	0.05	1.4	1.4	4.0
Average (2014-2017)	1.0	1.3	2.4	0.05	1.2	1.3	3.6
Share of Total Tourist, %	28	37	65	1	34	35	100

Source: Tourism Malaysia Kedah (2018)

Langkawi has more appealing tourism products for foreign visitors than mainland Kedah, particularly in ecotourism.

Aside from ecotourism, cruise tourism has the potential to expand in Langkawi despite its marginal contribution to total tourist arrivals. Approximately 143,000 cruise ship passengers visited Langkawi each year from 2014 to 2017, accounting for 4% of all visitors to the island. Meanwhile, tourists from the yachting sector accounted for less than 1% of all visitors from 2014 to 2017, or about 5,000 per year (Table 7).

Table 8 shows the number of ship calls and cruise passengers arriving at the port of call in Malaysia. The Star Cruise Jetty, Langkawi (Kedah) is the third most important port-of-call, following Boustead Cruise Centre (Port Klang) and Swettenham Pier Cruise (Penang) (Figure 5). The number of passengers arriving at Star Cruise Jetty was an average of 123,000

per year with 85 ship calls per year for 2016-2018.

Cruise lines visiting Langkawi (e.g., 2019) included AIDA Cruises, Costa Cruises, Cruise and Maritime, Cunard, Dream Cruises, Hapag Lloyd, Holland America, Marella Cruises, NCL, Oceania Cruises, P&O Australia, P&O Cruises, Phoenix Reisen, Princess Cruises, Regent Seven Seas, Royal Caribbean, Seabourn, Silversea, Star Clippers, Star Cruises, TUI Cruises and Windstar Cruises (Crew Center, 2019).

Princess Cruise Line and Norwegian Cruise Line are examples of cruise routes through the port-of-call at Star Cruise Jetty (Langkawi). Princess Cruise Line’s excursions take 29 days, starting from Singapore with a layover at Port Klang, Langkawi, Phuket, and ending in Rome (Figure 6). Whereas, the Norwegian Cruise Line begins in Bangkok with a stopover in Langkawi and ends in Singapore with an excursion of 12

Table 7: Visitors’ arrival by mode of entry for Langkawi Island, 2014–2019 (‘000 visitors)

Year	Sea: Kuah Jetty Terminal		Cruise	Yacht	Air: Airport		Sea: Langkawi Port	Total
	Domestic	Foreign			Car Passenger Ferry			
2014	2,178	132	159	6	1,019	86	21	3,601
2015	2,067	155	197	6	1,055	86	58	3,624
2016	2,078	136	58	5	1,172	120	67	3,635
2017	1,920	126	157	5	1,206	139	125	3,679
2018	–	–	–	–	–	–	–	3,629
2019	–	–	–	–	–	–	–	3,924
Average (2014–2017)	2,061	137	143	5	1,113	108	68	3,635
Average Share of Total Mode of Entry, %	57	4	4	0	31	3	2	100

note: – = not available

Source: Langkawi Development Authority (n.d.)

Table 8: Malaysia ship calls and cruise passenger arrivals, 2016–2018

Port-of-Call	State	Passengers (Number)				Ship Calls (Number)			
		2016	2017	2018	Average 2016-2018	2016	2017	2018	Average 2016-2018
1. Boustead Cruise Centre, Port Klang (BCC)	Selangor	251,499	305,420	364,511	307,143	142	165	249	185
2. Swettenham Pier Cruise, Penang Port	Penang	213,566	426,140	341,028	326,911	136	267	185	196
3. Star Cruise Jetty	Langkawi, Kedah	126,786	110,946	131,160	122,964	77	86	91	85
4. Melaka Marina (Melaka International Ferry Terminal)	Melaka	56,476	50,680	13,455	40,204	45	49	43	46
5. Lumut Port	Perak	349	387	190	309	1	2	1	1
6. Johor Port, Pasir Gudang	Johor	0	0	0	0	0	0	0	0
7. Pulau Redang port	Terengganu	4,589	0	19,783	12,186	3	0	7	5
8. Tioman Port	Pahang	4,589	0	0	4,589	3	0	0	3
9. Kota Kinabalu Port	Sabah	20,459	27,541	55,775	34,592	19	20	25	21
10. Labuan Port	Sabah	0	0	0	0	0	0	0	0
11. Sandakan	Sabah	0	0	2,577	2,577	0	0	4	4
12. Kuching Port	Sarawak	3,149	2,313	3,238	2,900	7	5	7	6
13. Bintulu Port	Sarawak	601	640	1,020	754	2	2	2	2
Sum of Above		682,063	924,067	932,737	846,289	435	596	614	548

Source: Ministry of Tourism, Arts and Culture, Malaysia (2020)

days (Figure 7). The route indicates a strong cruise route link between Langkawi and Phuket. However, no cruise has yet been linked between Langkawi and Sabang (Aceh). Hence, with the inclusion of Langkawi in the EC5, a SAPHULA tourism corridor can be established.

Sabang

According to the map of the EC5 (Figure 1), the SAPHULA triangular lines intersect with the triangular lines of EC5 (Figure 3). From the Indonesia perspective, this connectivity offers another aspect of an attempt to enhance Aceh’s node development. In 2013, the Ministry

of Tourism and Creative Economics, local government, and all travel and tourism sectors in Banda Aceh met to discuss the management of Sabang as a tourism destination with the greatest potential in Indonesia. (SerambiNews, 2013).

Since then, the Aceh government and relevant stakeholders have prepared to explore and exploit Sabang’s potential resources. This effort aimed to meet the criteria for developing four main national priority sector projects: Tourism, fisheries, industry and trade, and port services. According to the Governor of Aceh, Zaini Abdullah, the first initiative was to establish a tourism sector, followed by the

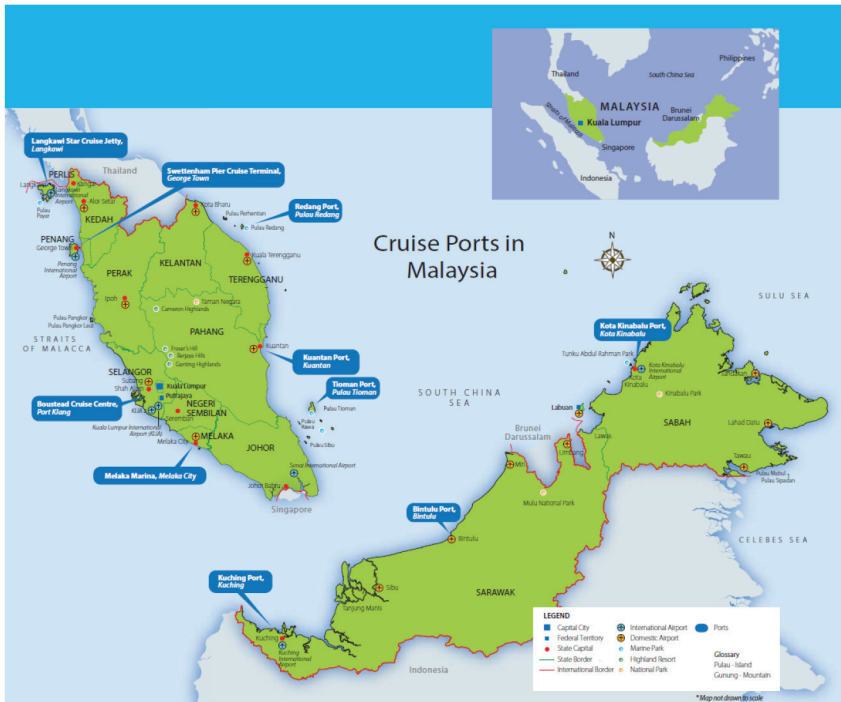


Figure 5: Cruise ports in Malaysia
 Source: Ministry of Tourism, Arts and Culture, Malaysia (2019)



Figure 6: Princess cruise line’s route from Singapore to Rome (left) and Norwegian cruise line’s route from Bangkok to Singapore (right)
 Source: Cruicercritic (n.d.)

rise of other sectors under the Sabang Cluster Destination Management Organisation (Humas Aceh, 2016). Stakeholders must be aware that all exploration and exploitation activities on Sabang’s natural resource wealth must be subjected to Presidential Regulation Number 16

of 2017 concerning Indonesia’s Marine Policy. One of the important points is the blue economy, which emphasises on sustainable development and efforts to safeguard the ecosystem. There are four pillars that stakeholders must pay attention to when implementing blue economy



Figure 7: Regent Seven Seas cruise line's route from Bangkok to Dubai (left) and Seabourne's route from Dubai to Singapore (right)

Source: Iglucruise (n.d.)

development, namely (1) the integration of land and sea development, (2) clean, inclusive and sustainable progression, (3) increasing added value and product competitiveness through innovation, as well as (4) improving a fair society (Setyawati *et al.*, 2021).

In the context of the Sabang tourism industry, according to the Office of Tourism of Aceh Province, Aceh's tourism policy serves as the framework for tourist development, marketing, and industry in the Sabang area. This coincides with the mandate set by Government Regulation Number 50 of 2011. The regulation stipulates that Pulau Weh and its surroundings are one of the National Tourism Strategic Areas (*Kawasan Strategis Pariwisata Nasional/KSPN*). Therefore, the Destination Management Organisation (DMO) began work in 2011, and until 2015 the DMO had attained much progress in the five stages. The first stage involved strengthening stakeholders' collective awareness movement (2011), the second stage was developing the tourist destination's management (2012), the third stage was coordinating/consolidating business development (2014), and stage four was strengthening and structuring the organisation and tourist management aspects (2015). Since then, Sabang development has entered the next stage, which was "directed more toward improving facilities and service quality" (Humas Aceh, 2016).

While Sabang's progress has been ongoing, the Indonesian government has decided on four provinces in Sumatra that are part of the ten designated provinces for halal tourism. The four provinces are Aceh, West Sumatra, Riau, and Riau Islands (Zuhriyah, 2019). Hence, this programme allows Aceh–Sabang to exploit all potential tourist industries to be grouped under the tourism sector to fulfil the dynamics of EC5 and the proposed SAPHULA corridor. In other words, the local government has been developing the halal tourism industry, and this effort is an integral part of the halal tourism programme under the IMT-GT project.

Meanwhile, the development of halal tourism means initiating efforts to prepare and provide all types of tourism infrastructure such as the cleanliness of hotels, places of worship, and restaurants via the enforcement of hygiene-related regulations and procedures, availability of clean and sufficient public toilets, and so on. This study believes that Sabang can contribute to developing the local economy by enhancing and supporting the tourism and travel industry. This optimistic view comes from Sabang's tourism potential being equal to other tourist spots in different countries. One example is the natural beauty of alluring waves for international yacht races, diving, and snorkelling at Sumur Tiga Beach and Iboh Beach. In 2011, Aceh hosted an International Sailboat Race festival called

the Sabang International Regatta 2011. This competition started with the departure point in Phuket (Thailand), then onto Langkawi (Malaysia) and ended in the natural harbour in Sabang City, Weh Island (Ebo, 2011). Participants from Australia, the United States, Malaysia, Germany, Singapore, Thailand, Hong Kong, and Indonesia were enthusiastic about the competition.

In 2016, this study carried out field research on Sabang and it found that the tourism infrastructure needed more tourist facilities. Based on discussions with local stakeholders and direct observation, there were just a few hotels with a 4 or 5-star rating. Even so, Sabang has become an attractive tourist spot for domestic and foreign tourists. Table 9 below shows the number of cruise and yacht callings at Sabang Port during 2016-2018. There were 63 yachts in 2016, 84 in 2017, and 96 in 2019. Meanwhile, there were 11 cruiser arrivals in 2016, which decreased to 3 and saw a small increase of 6 in the following year.

Sabang relies on ship calls to bring in domestic and foreign tourists. According to Sabang Free Port and Free Trade Zone Authority, some cruise line operators offer cruise call packages to Sabang and Phuket sequentially such as Regent Seven Seas and Seabourn Encore; thus, providing connectivity between the two spots. Regent Seven Seas Cruise starts from Thailand (Bangkok and Koh Samui) and sails through Singapore, Malaysia (Port Klang and Penang), Indonesia (Sabang), Thailand (Phuket), India

(Cochin, New Mangalore, Goa, and Mumbai), and United Arab Emirates (Fujairah and Dubai). Meanwhile, Seabourn Encore starts from Dubai, sails to Mumbai, Sabang, Phuket, Porto Malai, and other destinations, and ends the journey in Singapore. Therefore, there is a clear cruise line between Sabang and Phuket. As mentioned earlier, some cruise lines such as Princes and Norwegian Cruise Liner, offer cruise calls from Phuket to Langkawi.

Unfortunately, it is difficult to identify cruise liners that connect Langkawi and Sabang directly. A cruise liner named Oceania offered a package called Andaman Awakening for approximately 11 days in February 2022 with a stopover in Langkawi, Phuket, and Sabang; however, it did not connect Langkawi and Sabang directly (Iglucruise, n.d.).

Apart from cruise lines, tourists can also visit Sabang by fast ferry or roll-on-roll-off ferry from Ulee Lheue Port in Banda Aceh to Balohan Port in Sabang. Meanwhile, direct commercial flight routes to Sabang have been frozen. Tourists can take flights from Malaysia and various cities in Indonesia to the airport near Banda Aceh, then take a ferry or ro-ro to Sabang. These ship routes bring in tourists, which witnessed an increasing average trend in 2013-2017 (Table 10).

The arrival of yacht ships to Sabang relates to sightseeing, travelling, working, investment, and personal purposes (such as visiting family). They mainly come from Australia, the United States, Europe, Africa, and Asia (Yusuf, 2018).

Table 9: Number of ship-calls to Sabang

Type of Ships	2016	2017	2018
cruises	11	3	6
yachts	63	84	96
merchant/commercial Ships	35	19	17
Noncommercial ships	28	18	100
Indonesian government ships	11	3	6
Foreign government ships	1	1	-
Port Service Revenue	IDR1,953,211,139	IDR968,901,571	IDR1,886,889,647

Source: BPKS (2019)

Table 10: Number of Domestic and International Arrivals in Sabang, 2013-2017

Year	Domestic Visitors	International Visitors
2013	401,224	2,569
2014	512,992	3,564
2015	623,635	5,582
2016	724,923	10,038
2017	736,725	6,032

Source: BPKS (2019)

Hence, to cater for incoming tourists, the local government opened a Class II Immigration Office in Sabang City, which provides Limited Stay Permit Cards (KITAS) and Permanent Stay Permit Cards (KITAP).

Sabang City, located in Pulau Weh is one of the identified targets of world cruise ships. Based on the discussion with an official from the Ministry of Tourism Indonesia, several encouraging opportunities have branded Sabang as a tourist destination such as ease of entry permits granted by local authorities, its favourable geographical position that opens to the Hindia Ocean and right across the international shipping line, proactive action by tourism industry players who offer additional visits to Sabang to foreign travel agents, utilise the EC5 from the IMT-GT and the Ranong–Phuket–Aceh route. These opportunities are made available because the Sabang Tour Package is also promoted by Aceh and strengthen connectivity between Langkawi and Aceh to support the SAPHULA triangular tourist nodes. Tourists can take flights from Banda Aceh to Langkawi or vice versa, but the prices of tickets are quite expensive.

Several key issues have become a challenge for Sabang. First, tourism marketing packages must be integrated and packaged attractively (primary and secondary targets). Second, natural conditions such as big waves in northern Sabang can reach 1.5-3.5 m almost every month, and this factor should be considered. For example, on 27 July 2017, the cruise ship MS Pacific Eden with a British flagship, cancelled its decision to drop off passengers (1,400) for a trip to Sabang City (Armi, 2017). It made a loss on that trip to Sabang, especially due to dealings with some

tourism-linked businesses. Third, the port of Sabang should have a gallery for souvenirs to accommodate local Sabang handicrafts and food products. In addition, handy books, brochures, and digital information about tourist spots made available at the port will help tourists learn about attractive places in Sabang. It will be a convenient source of information for tourists who need quick information, especially foreign tourists who prefer to stay on cruise ships rather than in hotels in Sabang.

According to Lukijanto (2020), there are three main factors that form business obstacles to cruise ship visits to Indonesia. Firstly, the port infrastructure must meet tourist ship standards (navigation channel depth, mooring pool, turning area, mooring area, terminal for passengers, etc.). Secondly, port fees (docking fees, sea scout service fees, charge service fees for clean water, and fuel) are relatively very expensive (in comparison to neighbouring countries such as Singapore, Malaysia, and the Philippines), and thirdly, inconsistent regulations and lack of synchronisation between the interested parties and bureaucrats or policymakers related to cruise services.

Lukijanto’s assessment is crucial and warrants serious consideration by Sabang and other ports. Sabang needs to improve its port facilities further to keep up with ports in neighbouring countries. Occasionally, efforts to increase port capacity are imperative if Sabang Port wants to be included in the others.

Figure 8 depicts data provided by the Coordinating Ministry for Maritime and Investment regarding the comparison in costs of landing, docking, scouting, and so forth,

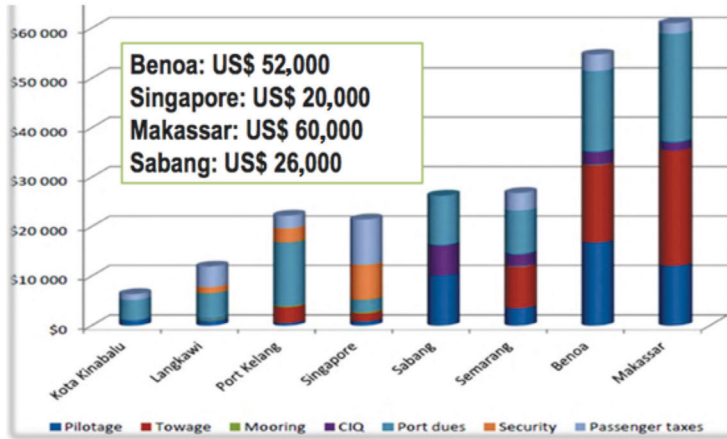


Figure 8: Comparison of the Costs of Landing, Docking, Scouting, and so forth in Selected Ports in Southeast Asia
 Source: Lukijanto (2020)

indicating that related service fees at Indonesian ports are more expensive than in Singapore. The prices in Sabang, Makassar, and Singapore are US\$26,000, US\$52,000, and US\$20,000, respectively. Even Langkawi only costs US\$10,000, which is far less than Singapore.

Institutional Mechanisms for Sabang–Langkawi Connectivity

Institutional mechanisms related to the Center for IMT-GT (CIMT) are critical in providing the foundation for connectivity between Sabang and Langkawi. Unlike the private-led Langkawi–Phuket connectivity, this strategy is more government-driven.

CIMT is the subregional secretariat of IMT-GT and it supports member countries in their efforts to coordinate and facilitate the planning, implementation, and monitoring of programmes and projects. Based on an interview in 2016, CIMT said that its mandate includes strengthening coordination mechanisms and consultation processes among IMT-GT institutions, providing an institutional framework to support public and private sector activities and facilitating the evaluation, implementation and monitoring of projects and other subregional initiatives. It represents the IMT-GT in establishing and enhancing external

relations with development partners, investors, and other institutions for potential collaboration-based ventures. It establishes databases that provide the required information for policy decisions (CIMT, 2016a).

National Secretariats have been established in the three countries to coordinate IMT-GT activities at the national level. The National Secretariat in Malaysia (NS Malaysia) is represented by the Economic Planning Unit (EPU) of the Prime Minister’s Department, Indonesia’s NS is the Coordinating Ministry for Economic Affairs (CMEA), and Thailand’s NS is the Office of the National Economic and Social Development Council, also known as NESDC.

Under CIMT’s institutional structure, tourism is one of the Working Groups (WGs) entrusted to develop the tourism industry in the IMT-GT jointly. The other WGs are transportation, information and communication technology, trade and investment, halal products and services, human resource development, education and culture, and agriculture and agro-based industry environment.

WG Tourism led the initiative to implement the SAPHULA Cruise Tourism Belt, which was based on the MoU on Marine Tourism Triangle Cooperation signed by the tourism ministers

Table 11: Working Group focal ministries at national and IMT-GT levels

Working Group	National Secretariat	Responsible Ministry
Tourism	- Malaysia: Economic Planning Unit	- Malaysia: Ministry of Tourism, Arts and Culture
	- Indonesia: Coordinating Ministry for Economic Affairs	- Indonesia: Ministry of Tourism and Creative Economy
	- Thailand: Office of the National Economic and Social Development Council	- Thailand: Ministry of Tourism and Transport

Source: CIMT (2016b)

of Indonesia, Malaysia, and Thailand in April 2017. Cruise liners that sail through the Straits of Malacca such as Royal Caribbean Cruises (United States), Cunard Line (United Kingdom), Norwegian Cruise Line (United States), and Resort World Cruises (Genting, Hong Kong) should be involved in WG Tourism’s efforts to develop a new Sabang–Langkawi cruise route.

Cruise liners play an important role in developing the SAPHULA tourism belt. This is based on a collaborative effort formed in 2017 between Penang Port and the Royal Caribbean Cruises to upgrade the Swettenham Pier Cruise Terminal in Georgetown, Penang. The port can accommodate larger ships at its facilities, provided improvements are carried out. The joint venture between Royal Caribbean and Penang Port will showcase Georgetown, a UNESCO World Heritage site to the tourism market aboard luxury cruise lines in 2017. Royal Caribbean scheduled 38 calls in Penang. The Royal Caribbean owns and operates three global brands including Royal Caribbean International, Celebrity Cruises, and Azamara Club Cruises. These brands operate 49 ships and call on approximately 535 destinations in all seven continents (Travel Agent Central, 2017).

Private sector stakeholders in the cruise industry from Malaysia and Indonesia should be also invited to provide inputs related to the SAPHULA development. A case in point is the Malaysian Cruise Industry Association (MCIA), which can contribute to promoting the proposed Langkawi–Sabang cruise route. This is due to MCIA’s role as an intermediary between members and the government, cruise lines, port operators,

and other relevant stakeholders. The association also encourages its members involved in the cruise industry to enhance and develop the cruise industry in Malaysia (Malaysia Cruise Industry Association, 2022). On the Indonesian side, it is proposed that the Coordinating Minister of Maritime Affairs and Investment establish a Cruise Shipping Coordinating Agency (CSCA). Such an agency would take the natural charms of Indonesian cruising and create a regulatory environment equally appealing to international cruise shipping.

Conclusions

Connectivity becomes an essential element in stimulating economic activities and further regional development. Regarding the feasibility of connecting Sabah and Langkawi to expand the Ranong–Phuket–Aceh Economic Corridor, there currently needs to be maritime connections between Langkawi and Sabang. Unlike the Langkawi and southwestern Thailand connectivity, which is market-driven, the Sabang-Langkawi connectivity link should be initially driven by the governments with Indonesia, Malaysia, and Thailand collaborating to attract cruise ships passing through the Straits of Malacca.

Regarding the potential development of cruise tourism under the SAPHULA tourism belt, Langkawi–Sabang has the potential to become a cruise tourism corridor due to its location along the cruise route that traverses the Straits of Malacca and the Andaman Sea. Furthermore, the Langkawi–Phuket Tourism Corridor is market-driven and supported by

the Kedah and Perlis state governments. This tourism corridor could be expanded to Sabang. To do so, Indonesia, Malaysia, and Thailand governments should coordinate more through the IMT-GT Working Group on Tourism. WG Tourism should lead the initiative to implement the SAPHULA Cruise Tourism Belt, which was based on a MoU on Marine Tourism Triangle Cooperation signed by the tourism ministers of Indonesia, Malaysia, and Thailand in April 2017. Cruise liners that traverse through the Straits of Malacca such as Royal Caribbean Cruises (United States), Cunard Line (United Kingdom), Norwegian Cruise Line (United States), and Resort World Cruises (Genting, Hong Kong) should be involved in WG Tourism's efforts to develop a new Sabang–Langkawi cruise route.

Learning from the success story of the Langkawi–Phuket tourism corridor, a collaboration between private and public stakeholders in the cruise industry included in the EC5's framework is also crucial for the eventual realisation and development of the SAPHULA tourism belt. This success will help to realise the CIMT Vision 2036, which includes tourism as one of the strategic pillars driving the IMT-GT region forward.

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