



Mandalika Specifics: A Conceptual Analysis of Opportunities and Challenges in Tourism-Based Development Strategy in Indonesia

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Abstract

Background: Tourism-based Special Economic Zones (SEZs) are a central instrument of Indonesia's regional development strategy. The Mandalika SEZ in Lombok, West Nusa Tenggara, represents a national priority project integrating investment, infrastructure, and ecotourism to create a new growth pole and reduce inter-regional development disparities.

Objective: This study examines the strategic rationale of the Mandalika SEZ, identifies economic, social, and environmental development opportunities, and evaluates challenges in implementing inclusive and sustainable governance.

Methods: A qualitative policy-analytical approach was employed, drawing on secondary data from government policy documents, reports from international agencies (UNCTAD, World Bank, OHCHR), and peer-reviewed literature published between 2019 and 2025. Data were analyzed through thematic content analysis following the Miles and Huberman model.

Results: The Mandalika SEZ demonstrates significant potential to drive regional economic growth through investment attraction, job creation, and international tourism competitiveness. However, land acquisition disputes, community displacement, weak local economic linkages, and coastal ecosystem pressures represent critical implementation challenges. Governance effectiveness and participatory planning emerged as key determinants of sustainable outcomes.

Conclusion: Effective governance, community capacity-building, and consistent application of sustainable development principles are essential to ensure that the Mandalika SEZ functions not merely as a global tourism destination but as an instrument for inclusive and sustainable regional economic transformation.

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INTRODUCTION

The Indonesian government is increasingly using Special Economic Zones (SEZs) as a policy instrument to drive economic growth, attract foreign direct investment (FDI), and reduce regional disparities (Winanto & Ramdhan, 2024). SEZs are intended to act as growth poles that stimulate industrialization, tourism, and employment in less developed areas by offering various fiscal and regulatory incentives (Łukaniszyn-Domaszewska et al., 2023; Tamba et al., 2025). One of the most prominent and ambitious projects in this regard is the Mandalika Special Economic Zone, located in Central Lombok, West Nusa Tenggara Province (NTB) (Nafisah et al., 2024). Officially established in 2017 under Presidential Regulation No. 52/2014 and later reinforced by

the 2020–2024 National Medium-Term Development Plan (RPJMN), the Mandalika SEZ was selected as one of Indonesia's five super-priority tourist destinations. Moreover, since the enactment of Law No. 39/2009 on Special Economic Zones, the Indonesian government has progressively expanded the SEZ program as a core instrument of the RPJMN 2020–2024 to drive economic growth, attract FDI, and reduce regional disparities (Winanto & Ramdhan, 2024).

This zone covers more than 1.035,67 hectares of coastal land and is managed by an Indonesian state-owned enterprise. The Mandalika SEZ has been strategically positioned as a hub for sports tourism, and MICE activities (meetings, incentives, conferences, and exhibitions), with key infrastructure such as the Pertamina Mandalika International Street Circuit, which has hosted the Indonesian MotoGP Grand Prix starting in 2022. Through this initiative, the Indonesian government envisions Mandalika as a "New Bali," aiming to promote sustainable tourism that generates inclusive economic benefits while preserving local culture and the natural environment. The managing entity is PT Pengembangan Pariwisata Indonesia (Persero) / Indonesia Tourism Development Corporation (ITDC), a state-owned enterprise under the Ministry of State-Owned Enterprises, which is responsible for master planning, infrastructure development, and investor relations within the Mandalika SEZ.

Despite these ambitions, the implementation of the Mandalika Special Economic Zone (SEZ) has raised complex concerns regarding land rights, community displacement, environmental degradation, and governance transparency (Mahsun & Ridho, 2024; Suhartini et al., 2025). Civil society organizations and international observers, including the Office of the United Nations High Commissioner for Human Rights (OHCHR), have called for a more inclusive and participatory development process. This paper provides a conceptual analysis of the Mandalika SEZ, examining its expected benefits, strategic design, and governance framework, while addressing critical concerns related to environmental sustainability, social inclusion, and long-term economic viability. By integrating perspectives from SEZ development theory, tourism-led growth models, and sustainable development frameworks, this study seeks to contribute to the discourse on equitable regional transformation in developing countries (Feby et al., 2025).

Despite a growing body of literature on Indonesian SEZs and on tourism-based regional development, existing studies tend to address either the economic dimensions or the social-environmental dimensions in isolation (Nafisah et al., 2024; Tamba et al., 2025; Winanto & Ramdhan, 2024). A comprehensive, multidimensional conceptual analysis that simultaneously examines investment rationality, governance effectiveness, and sustainability imperatives applied to the Mandalika SEZ, remains absent from the academic literature. This study fills that gap by integrating special economic zone theory, the tourism-led growth hypothesis, regional competitiveness theory, and inclusive-sustainable development principles into a unified analytical framework.

The Strategic Objective of the Mandalika Special Economic Zone (SEZ) is to drive economic growth, increase investment, and create jobs through the development of ecotourism. To achieve this strategic objective, the following policies are implemented: Promoting investment in the tourism sector, developing world-class tourism infrastructure (hotels, racing circuit, MICE facilities), Creating jobs for local communities, Increasing GRDP through tourism services and events, and supporting the national target of attracting 20 million international tourists annually. This zone covers approximately 1.035,67 hectares and is managed by the Indonesia Tourism Development Corporation (ITDC), with projected investments exceeding Rp 40 trillion (~USD 2.6 billion).

The analysis of the Mandalika Special Economic Zone's development in this study is built through the integration of several key theoretical perspectives that complement each other, namely the theory of special economic zones, the theory of tourism-led growth, the theory of regional competitiveness, and the concepts of inclusive and sustainable development. This multidimensional approach is necessary to comprehensively understand the dynamics of regional development, considering the character of the Mandalika SEZ not only as an investment project but also as an instrument for regional economic transformation.

Special Economic Zones (SEZs) are geographically delimited areas with specific policies, including fiscal incentives, regulatory simplifications, and infrastructure provision, to attract investment and encourage economic growth (Narula & Zhan, 2019; Xu & Yeh, 2011). From the

perspective of regional development theory, SEZs are seen as a government intervention instrument to create new growth poles capable of generating multiplier effects for surrounding areas (Arbolino et al., 2023; Imsar & Zaman, 2024). The success of an SEZ is highly influenced by the quality of infrastructure, policy stability, institutional capacity, and economic linkages with the domestic sector (Naeem et al., 2020).

This approach aligns with the views of international institutions such as the World Bank and the United Nations Conference on Trade and Development, which emphasize that the effectiveness of special economic zones is determined not only by investment incentives but also by the quality of governance and integration with the national and regional economy.

The tourism-led growth hypothesis (TLGH) explains that the tourism sector can be a driving force for economic growth through increased foreign exchange, job creation, infrastructure investment, and the development of supporting sectors such as transportation, trade, and services. In the context of developing countries, tourism is often seen as a strategic sector because it is labor-intensive and can drive economic growth in regions with limited industrial resources.

In the case of the Mandalika SEZ, the TLGH is operationalized through three specific mechanisms: (1) international events—most notably the MotoGP Mandalika Grand Prix, which attracted over 55,000 spectators and generated an estimated IDR 3.6 trillion in economic impact in its 2022 edition—acting as catalysts for global destination branding and visitor arrivals; (2) world-class tourism infrastructure investment, including the Pertamina Mandalika International Street Circuit, luxury hotel developments, and MICE facilities, which stimulate FDI inflows and service-sector employment; and (3) policy incentives embedded in the SEZ framework—tax holidays, simplified licensing, and land-use concessions—that lower investment barriers and accelerate capital accumulation in the tourism value chain.

However, the effectiveness of tourism as a growth driver highly depends on the level of linkage between the tourism sector and the local economy (local economic linkages). Without strong integration, tourism development risks creating an enclave economy, where economic growth is concentrated in a specific area without equitable distribution of benefits to the surrounding community.

The perspective of regional competitiveness emphasizes the importance of a region's competitive advantage in attracting investment and increasing economic productivity. The economic cluster approach explains that the concentration of economic activities within a region can enhance efficiency through agglomeration, business networks, innovation, and knowledge transfer. In the context of tourism-based SEZs, developing a tourism cluster encompasses linkages between the accommodation sector, transportation, creative economy, culinary arts, and micro, small, and medium enterprises.

Regional competitiveness is determined not only by natural resources but also by the quality of infrastructure, human resources, institutional governance, and the destination's image at the global level. Therefore, developing an integrated tourism area requires a strategy to strengthen the local economic ecosystem so that development benefits can be distributed optimally.

The concept of inclusive and sustainable development emphasizes that economic growth must go hand in hand with social justice and environmental protection (Scheyvens, 2018). This approach refers to the triple bottom line principle, which simultaneously encompasses economic, social, and environmental dimensions. In the context of tourism area development, sustainability is not only related to environmental conservation but also to the distribution of economic benefits, protection of local community rights, and participation in decision-making processes (Baloch et al., 2023; Saarinen, 2019).

Non-inclusive development has the potential to cause social conflict, economic inequality, and environmental damage, which can ultimately reduce the long-term sustainability of the area. Therefore, integrating sustainable development principles is a key factor in ensuring the success of tourism-based special economic zones (Dirgantara & Baswarani, 2025). Recent scholarship on sustainable tourism governance underscores that community participation is not merely a normative aspiration but an operational necessity. Trisniati (2022) demonstrate that collaborative governance models—where local communities are formally represented in SEZ

management boards—significantly reduce land conflict incidence and improve benefit-sharing outcomes. In coastal tourism contexts specifically, Feby (2025) show that participatory environmental planning reduces ecosystem degradation by enabling locally embedded monitoring that government agencies alone cannot provide. For Mandalika, these findings suggest that the institutionalization of community voice in ITDC's planning and oversight processes is a prerequisite for long-term zone viability, not an optional governance add-on.

Based on the integration of these four theoretical perspectives, the development of the Mandalika SEZ can be understood as a process of regional economic transformation influenced by the interaction between investment, tourism, regional competitiveness, institutional governance, and social and environmental sustainability. Special economic zone theory explains the role of policy and investment as triggers for growth, while the tourism-led growth hypothesis explains the economic mechanism of the tourism sector in creating added value. The perspective of regional competitiveness highlights the importance of economic agglomeration and integration of local sectors, whereas the sustainable development approach emphasizes the balance between economic growth, social inclusion, and environmental preservation.

With this theoretical framework, this study positions the Mandalika SEZ as a tourism-based regional development model whose success highly depends on the quality of local economic integration, the effectiveness of governance, and the consistent application of sustainable development principles.

This study is positioned to address three interconnected research objectives: (1) to examine the strategic rationale underlying the Mandalika SEZ within the theoretical frameworks of SEZ development, tourism-led growth, and regional competitiveness; (2) to identify the key economic, social, and environmental opportunities and challenges associated with the zone's development trajectory; and (3) to evaluate the governance and policy conditions necessary for the Mandalika SEZ to function as a model of inclusive and sustainable tourism-based regional transformation. This study advances beyond existing single-dimension analyses by offering an integrated multi-theoretical perspective that is directly applicable to policy design and academic discourse on tourism-based SEZs in developing countries.

METHOD

This study adopted a qualitative research design, specifically a policy-analytical and literature-based conceptual study, which systematically examined policy documents, institutional reports, and academic literature to construct an evidence-informed conceptual analysis of the Mandalika SEZ development strategy. Unlike a systematic review, this design privileged interpretive depth and theoretical integration over exhaustive literature enumeration; unlike a case study, it relied entirely on secondary sources and did not involve field observation or primary data collection. The qualitative approach was appropriate given the study's focus on policy rationality, multidimensional development dynamics, and governance interpretation phenomena that resist reduction to quantitative metrics.

The object of the research was the Mandalika Special Economic Zone, located in Central Lombok Regency, West Nusa Tenggara Province, as one of the national priority tourist destinations developed through a special economic zone scheme. This area was chosen because it has unique characteristics as an integrated tourism development project that integrates investment, infrastructure, and local economic development. The unit of analysis was the development policy and governance framework of the Mandalika SEZ, specifically the policy instruments, regulatory arrangements, and institutional mechanisms governing investment, infrastructure, community relations, and environmental management within the zone. This included both the formal policy architecture (laws, regulations, master plans) and its documented implementation dynamics as reported in institutional and academic sources.

The data used in this study were secondary data obtained through documentation studies and literature reviews. Data sources included government policy documents, reports from official institutions, publications from international agencies, and scientific articles relevant to the research topic. The policy documents analyzed included national development plans, regulations related to special economic zones, and tourism sector development reports published by the National Development Planning Agency (Bappenas) and the Ministry of Tourism and Creative

Economy. Additionally, this study utilized reports from international institutions such as the World Bank and the United Nations Conference on Trade and Development to strengthen the conceptual analysis regarding the development of special economic zones and tourism-based development.

The document corpus was delimited to sources published between 2019 and 2025 to ensure policy relevance and recency, with selected foundational works included as methodological anchors (Miles & Huberman, 1994). Policy documents were sourced directly from official Indonesian government portals (Bappenas, Kemenparekraf, Bappeda NTB, BPS NTB) and international agency repositories (UNCTAD, World Bank, OHCHR). A total of 13 primary policy/institutional documents and 15 peer-reviewed journal articles were included in the final analysis corpus, selected based on three criteria: (1) direct relevance to the Mandalika SEZ or Indonesian SEZ policy; (2) publication in indexed journals (Sinta \geq 3 or Scopus/WoS) or official institutional authorship; and (3) availability of full text in Indonesian or English.

Data collection was carried out through a systematic literature search of sources with academic credibility and relevance to the research topic. The literature selection process was based on thematic suitability, publication quality, and contribution to the research analytical framework. This approach allowed researchers to gain a comprehensive understanding of the practices and theories of tourism-based special economic zone development. The literature search was conducted across three databases: Google Scholar, Garuda (Portal Garba Rujukan Digital), and DOAJ. Search keywords used were: "Mandalika Special Economic Zone," "KEK Pariwisata Indonesia," "tourism-led growth hypothesis," "inclusive tourism development," "sustainable SEZ governance," and "regional competitiveness tourism." Searches were conducted in June–July 2025. Initial screening yielded 87 items; after applying inclusion/exclusion criteria, 28 sources were retained for thematic analysis.

Data analysis was performed using descriptive qualitative analysis techniques, involving stages of data reduction, data presentation, and interpretative conclusion drawing. The collected data were classified according to the main research themes: economic development opportunities, social and environmental challenges, and area policy governance. Subsequently, analysis was conducted by integrating the theoretical framework of special economic zones, the tourism-led growth model, and the perspectives of sustainable and inclusive development. This analytical approach aimed to produce a conceptual synthesis capable of explaining the strategic position of the Mandalika Special Economic Zone in the context of regional development in Indonesia.

The analytical framework operationalized four theoretical dimensions as coding categories: (1) SEZ investment and policy rationality; (2) tourism-led economic growth mechanisms; (3) regional competitiveness and cluster effects; and (4) inclusive and sustainable development outcomes. Each source was systematically coded against these categories, and cross-category patterns were identified through interpretive synthesis to produce the conceptual findings presented in the Results and Discussion section. This three-stage process—data reduction, data display, and conclusion drawing/verification—followed the interactive model of qualitative data analysis proposed by Miles, Huberman, and Saldaña (2014), which is widely applied in policy-analytical and document-based qualitative research.

Through this method, this research was expected to contribute academically to the development of literature on tourism-based special economic zones while providing policy implications for the development of sustainable and inclusive zones in the future.

To ensure the credibility and trustworthiness of the analysis, three validity procedures were applied (Lincoln & Guba, 1985). First, source triangulation: findings were cross-validated across at least three independent source types (government policy documents, international agency reports, and peer-reviewed journal articles) before being presented as analytical conclusions. Second, document cross-checking: specific claims about economic impacts, land displacement, and governance arrangements were verified against multiple independent documents to detect inconsistencies or contradictions. Third, interpretation validation: preliminary interpretations were reviewed against the stated theoretical frameworks to ensure analytical coherence and alignment with the study's conceptual model. These procedures aligned with Lincoln and Guba's (1985) criteria for establishing credibility and confirmability in

qualitative research.

RESULTS AND DISCUSSION

Result

The development of the Mandalika Special Economic Zone represents a form of regional development policy intervention that places the tourism sector as a driving force for economic growth (Suryade et al., 2022). Conceptually, this approach aligns with the growth pole theory paradigm, which emphasizes the importance of creating new growth centers to generate economic multiplier effects on surrounding areas. In this context, the existence of the Mandalika SEZ in West Nusa Tenggara Province is intended not only to improve the performance of the tourism sector but also to accelerate the structural economic transformation of the region through increased investment, infrastructure development, and job creation.

The analysis results indicate that tourism-based area development has the potential for significant economic impacts through several key mechanisms: increased investment in the service sector, expansion of employment opportunities, and growth of derivative economic activities. The presence of international-scale infrastructure such as the Pertamina Mandalika International Street Circuit, which hosts the Indonesian MotoGP, contributes to increasing the area's global exposure, which in turn strengthens its attractiveness for investment and tourist visits. From the perspective of the tourism-led growth hypothesis (TLGH), this condition reveals a potential relationship between tourism development and regional economic growth through increased aggregate demand and local economic activity.

Available secondary data provide empirical anchoring for these conceptual claims. Prior to the SEZ's full operation, Central Lombok Regency recorded a GRDP growth rate of 4.2% in 2019; by 2022, the regency's economy had grown at an estimated 5.8%, partly attributable to SEZ-related construction and tourism activity. Foreign tourist arrivals to Lombok via Zainuddin Abdul Madjid International Airport increased from approximately 1.04 million in 2019 to a trajectory recovering toward pre-pandemic levels by 2023. The 2022 MotoGP Mandalika Grand Prix alone was projected to generate IDR 3.6 trillion in total economic impact, with hotel occupancy in the area reaching near-full capacity during the event weekend. Employment in the formal tourism sector in NTB grew by an estimated 12,000 positions between 2020 and 2023, with ITDC reporting over 7,500 workers directly engaged in SEZ construction and operations.

Discussion

However, the magnitude of the resulting economic benefits is highly dependent on the level of sectoral linkages between the tourism area and the local economy. Without strong integration with the agricultural, fisheries, micro-enterprise, and community creative economy sectors, area development risks creating an enclave economy—a condition where modern economic activity thrives but has limited connections with the surrounding community. Therefore, strengthening local value chains is a key factor in ensuring that economic benefits can be distributed more equitably.

From a social aspect, the development of the Mandalika SEZ shows complex dynamics, particularly concerning inclusivity issues and changes in the community's socio-economic structure. Transforming an area from an agrarian and fisheries-based region into a modern tourism area has the potential to disrupt local livelihoods if not accompanied by human resource capacity-building programs. Furthermore, issues of land acquisition and community relocation pose challenges that require policy approaches sensitive to social justice aspects. From the perspective of inclusive development, the success of an area is measured not only by economic growth but also by the extent to which local communities gain access to the new economic opportunities created. These social dynamics both support and partially challenge TLGH's core premise.

While aggregate economic indicators align with TLGH predictions—tourism-driven investment stimulating growth, employment, and service-sector expansion—the uneven distribution of benefits and documented community displacement suggest that TLGH's assumption of diffuse growth-pole effects does not automatically materialize in practice. This divergence supports Suryade (2022) finding that the 'local economic linkages' condition is not

spontaneously generated by tourism investment alone but requires active policy intervention to prevent enclave economy formation. Growth pole theory, in turn, is validated in its prediction of multiplier effects at the macro level but challenged at the community level where benefits are spatially and socially concentrated.

From an environmental perspective, large-scale coastal area development has consequences for ecosystem carrying capacity. Increased construction activity, water resource consumption, and tourism waste production can potentially put pressure on the environment if not managed sustainably. Within the sustainable development framework, a balance between economic growth and environmental conservation is a primary prerequisite for the long-term sustainability of the area. Implementing green tourism principles, integrated waste management, and protecting coastal ecosystems are strategic factors to minimize the risk of environmental degradation. Addressing these pressures requires engagement with established sustainability policy instruments.

Environmental Impact Assessment (AMDAL/EIA) under Government Regulation No. 22/2021 mandates comprehensive impact analysis before construction approval—yet NGO documentation suggests that monitoring of AMDAL compliance within the Mandalika SEZ has been inconsistent. Coastal carrying capacity analysis, following methodologies recommended by UNWTO's Sustainable Tourism Guidelines, could be institutionalized as a mandatory pre-development requirement. Furthermore, sustainable tourism certification systems such as the Global Sustainable Tourism Council (GSTC) criteria provide internationally recognized benchmarks that Mandalika could adopt to signal environmental credibility to responsible investors and eco-conscious travelers.

The governance aspect also emerges as a crucial determinant in the success of special economic zone development (Trisniati et al., 2022). Area management by the Indonesia Tourism Development Corporation requires effective cross-sectoral coordination between the central government, local government, businesses, and the community. Institutional complexity and potential overlapping authorities can become implementation barriers if not accompanied by clear coordination mechanisms. Additionally, transparency in investment management, policy accountability, and robust monitoring and evaluation systems are important factors in increasing public and investor confidence in area development.

The analysis synthesis shows that the Mandalika SEZ has great potential as an instrument for tourism-based regional economic transformation. However, its success heavily depends on the management's ability to simultaneously balance the economic, social, and environmental dimensions. A development approach that is overly oriented toward economic growth without considering social inclusivity and environmental sustainability risks creating inequality and future conflicts. Therefore, area development strategies need to be directed toward strengthening local economic linkages, community empowerment, and implementing transparent and sustainable governance.

This conceptual finding confirms that the development of tourism-based special economic zones is not merely an infrastructure and investment project but also a process of regional socio-economic transformation that requires a comprehensive and long-term oriented policy approach.

CONCLUSION

This study demonstrates that the Mandalika SEZ constitutes a structurally significant instrument of tourism-led regional development, whose economic potential is analytically well-supported by SEZ theory, growth pole theory, and the tourism-led growth hypothesis. Across four analytical dimensions, the study identifies: (1) substantial economic opportunity through FDI attraction, international event-induced multiplier effects (est. IDR 3.6 trillion from MotoGP 2022), employment generation, and service-sector expansion; (2) social risk from land displacement and unequal benefit distribution that threatens community cohesion and the zone's long-term social license to operate; (3) environmental vulnerability in coastal ecosystems requiring institutionalized carrying capacity analysis, EIA compliance enforcement, and sustainable certification; and (4) governance as the critical mediating variable—effective cross-sectoral coordination, participatory planning, and transparent accountability mechanisms are necessary conditions for transforming investment-led growth into inclusive socioeconomic transformation.

The scientific contribution of this study lies in its multi-theoretical conceptual framework that bridges the operational (investment, infrastructure) and normative (governance, sustainability) dimensions of tourism-based SEZ development a synthesis absent from existing single-dimension analyses in the Indonesian context. The study's policy implication is clear: the Mandalika SEZ's long-term viability requires a governance architecture that institutionalizes community participation, enforces environmental compliance, and actively builds local economic linkages across the agricultural, fisheries, and creative economy sectors. Future research should employ mixed methods designs with primary field data to empirically test the causal relationships proposed in this study's conceptual framework, and to measure the actual distribution of development benefits at the household level.

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AUTHOR CONTRIBUTION STATEMENT

Lalu Suryadi S was responsible for the conceptualization of the study, methodology, data collection, and writing the original draft. Agus Suman contributed to the research design, data analysis, and review of the manuscript. Marlina Ekawaty assisted in the literature review, data analysis, and writing – review and editing. Ferry Prasetyia contributed to the research methodology, data collection, and writing – review and editing.

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