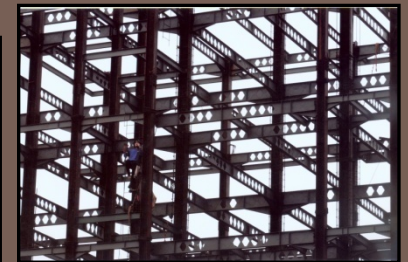
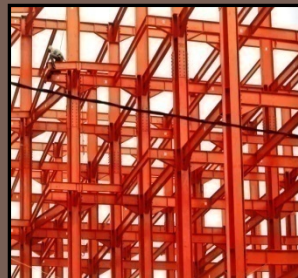


INDONESIAN CONSTRUCTION:

Current Condition and Projection of Equipment Requirement

1



EKONID / BMWi Business Conference
Jakarta, 3rd November 2014

OUTLINE

2

1. ASOSIASI KONTRAKTOR INDONESIA (AKI)
2. CURRENT CONDITION OF INDONESIAN CONTRACTORS
3. POTENTIAL NEEDS FOR HEAVY EQUIPMENT

1. ASOSIASI KONTRAKTOR INDONESIA

3

- AKI (Asosiasi Kontraktor Indonesia or The Indonesian Contractors Association – ICA) established since 1973, nowadays has become one of the Indonesia's most prestigious associations and represents the very best in construction services.
- AKI (ICA) is representing Indonesian Contractors to become a member of regional associations such as :
 - ▣ ASEAN Constructors Federation (ACF), and
 - ▣ International Federation of Asian and Western Pacific Contractors Association (IFAWPCA).

1. ASOSIASI KONTRAKTOR INDONESIA

4

□ **REGULAR MEMBERS:**

Company owned by private, cooperative, state or local government owned, operating in the field construction with legal standing acts including updates according to law of Indonesia.

□ **ASSOCIATE MEMBERS:**

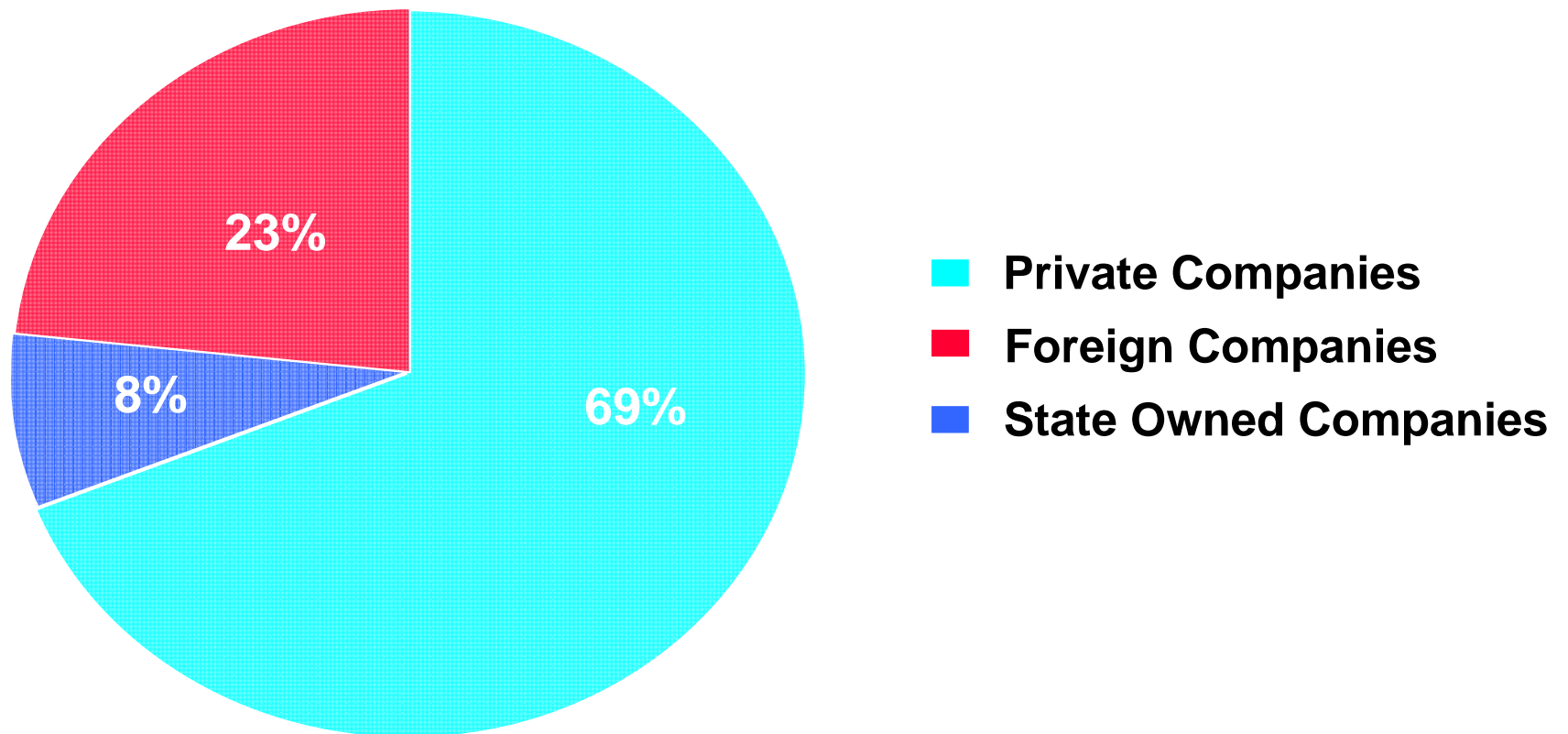
- Foreign company operating in the field of construction that meet condition set out in the regulation and law of Indonesia
- Non Contractor Company which business closely related to Contractors business.
- Indonesian Contractors, which not yet fully fulfill the entire requirement for being accepted as regular member..

□ Total Members : 130 Companies

1. ASOSIASI KONTRAKTOR INDONESIA

5

□ Members Diagram

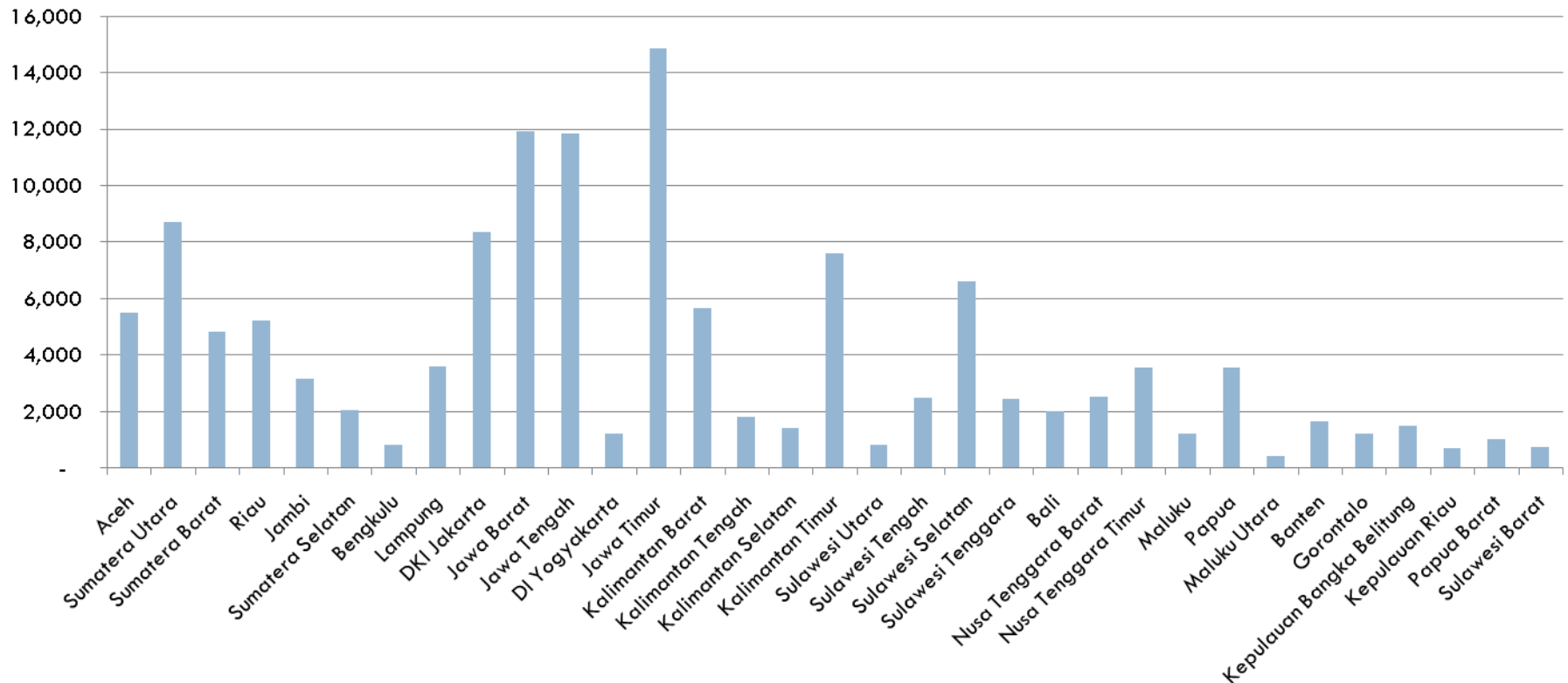


2. CURRENT CONDITION OF INDONESIAN CONTRACTORS

6

A. CONSTRUCTION COMPANIES

TOTAL CONSTRUCTION COMPANIES



TOTAL CONTRACTOR SERVICE COMPANIES = 131.319

Source : LPJKN, 6 January 2014

2. CURRENT CONDITION OF INDONESIAN CONTRACTORS (2/5)

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B. CONSTRUCTION WORKERS

1) WORKERS IN VARIOUS SECTORS (2004-2013)

No.	Lapangan Pekerjaan Utama	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
			November	Agustus	Agustus	Agustus	Agustus	Agustus	Agustus	Agustus	Agustus
1	Pertanian, Perkebunan, Kehutanan, Perburuan dan Perikanan	40,608,019	41,309,776	40,136,242	41,206,474	41,331,706	41,611,840	41,494,941	39,328,915	38,882,134	39,959,073
2	Pertambangan dan Penggalian	1,034,716	904	924	995	1,070,540	1,155,233	1,254,501	1,465,376	1,601,019	1,555,564
3	Industri	11,070,498	11,952,985	11,890,170	12,368,729	12,549,376	12,839,800	13,824,251	14,542,081	15,367,242	14,784,843
4	Listrik, Gas dan Air	228,297	194,642	228,018	174,884	201,114	223,054	234,070	239,636	248,927	254,528
5	Konstruksi	4,540,102	4,565,454	4,697,354	5,252,581	5,438,965	5,486,817	5,592,897	6,339,811	6,791,662	6,885,341
6	Perdagangan, Rumah Makan dan Jasa Akomodasi	19,119,156	17,909,147	19,215,660	20,554,650	21,221,744	21,947,823	22,492,176	23,396,537	23,155,798	24,804,705
7	Transportasi, Pergudangan dan Komunikasi	5,480,527	5,652,841	5,663,956	5,958,811	6,179,503	6,117,985	5,619,022	5,078,822	4,998,260	5,231,775
8	Lembaga Keuangan, Real Estate, Usaha Persewaan dan Jasa Perusahaan	1,125,056	1,141,852	1,346,044	1,399,940	1,459,985	1,486,596	1,739,486	2,633,362	2,662,216	3,012,770
9	Jasa Kemasyarakatan, Sosial dan Perorangan	10,515,665	10,327,496	11,355,900	12,019,984	13,099,817	14,001,515	15,956,423	16,645,859	17,100,896	17,532,590
10	Lainnya	-	-	-	-	-	-	-	-	-	-
	Total	93,722,036	93,958,387	95,456,935	99,930,217	102,552,750	104,870,663	108,207,767	109,670,399	110,808,154	114,021,189

Sumber: Survei Angkatan Kerja Nasional (Sakernas) 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, dan 2013

2. CURRENT CONDITION OF INDONESIAN CONTRACTORS (3/5)

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2) SKILLED CONSTRUCTION WORKERS WITH CERTIFICATION

- Total skilled expert is about 10 %, skilled labor about 30 % and labor about 60 %.
- Expert with certification 7,17% from total skilled expert while skilled labor with certification is 5,58% from total skilled labor.

NO.	QUALIFICATION	TOTAL	PERCENTAGE
1.	SKILLED EXPERT with certification	48.761	7,17%
2.	SKILLED LABOR with certification	109.723	5,38%
3.	ASEAN (MRA)	191	
	Engineer (ACPE)	140	
	Architect (AA)	51	

Source: LPJKN & Pusbin SDI

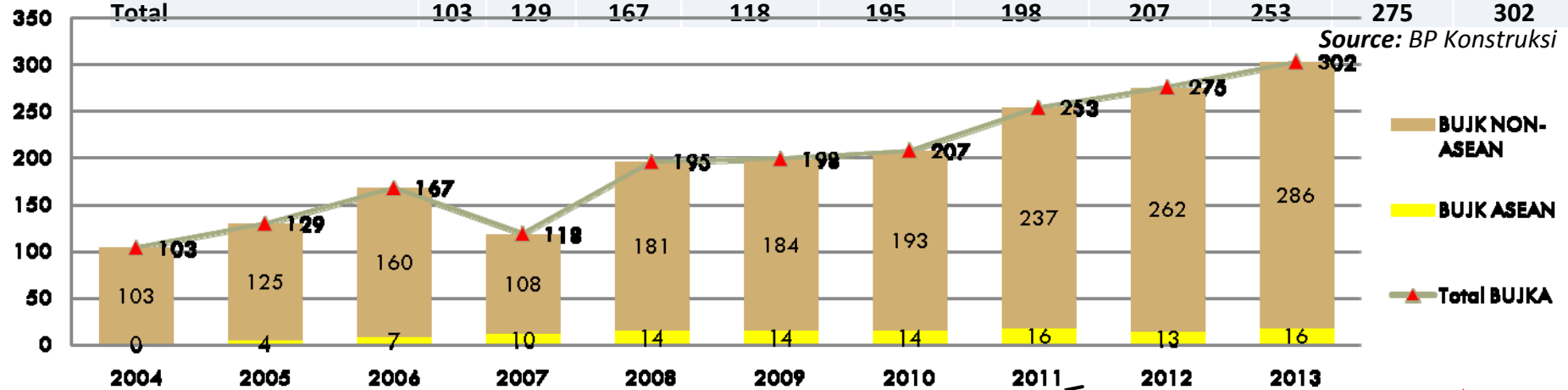
2. CURRENT CONDITION OF INDONESIAN CONTRACTORS (4/5)

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C. FOREIGN CONSTRUCTION COMPANIES

1) Total RO (J.O) Registered Foreign Construction Companies In Indonesia

Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Foreign Company ASEAN		4	7	10	14	14	14	16	13	16
Foreign Company NON-ASEAN	103	125	160	108	181	184	193	237	262	286
Total	103	129	167	118	195	198	207	253	275	302



Ratification WTO
1994

Ratification AFAS
1995

ASEAN-China
2004

ASEAN-Korea
2005

ASEAN-Japan
2008

ASEAN-AANZ
2009

ASEAN-India
2010



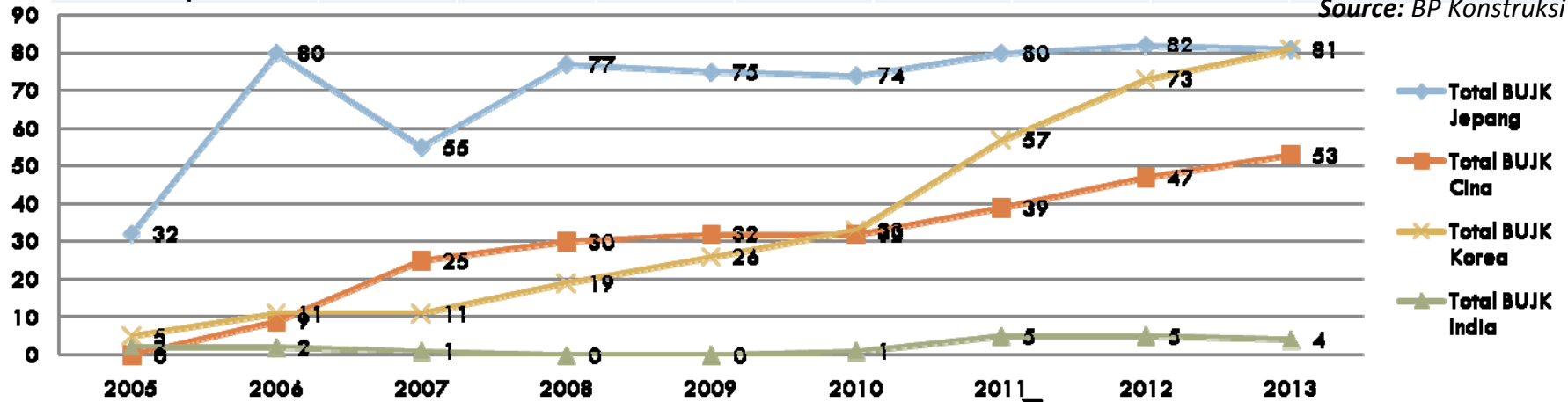
2. CURRENT CONDITION OF INDONESIAN CONTRACTORS (5/5)

10

2) Comparison RO (J.O) Foreign Construction Companies in Indonesia

Tahun	2005	2006	2007	2008	2009	2010	2011	2012	2013
Japanese Companies	32	80	55	77	75	74	80	82	81
Chinese Companies	0	9	25	30	32	32	39	47	53
Korean Companies	5	11	11	19	26	33	57	73	81
Indian Companies	2	2	1	0	0	1	5	5	4

Source: BP Konstruksi



3. POTENTIAL NEEDS FOR HEAVY EQUIPMENT (1 / 3)

11

Basic equipment for Road projects

Asphalt Mixing Plant, Stone Crusher, Wheel Loader, Excavator, Bulldozer, Vibratoric Roller, Motor Grader, Genset, Dump Truck, Asphalt Finisher, Tire Roller, Tandem Roller

Basic equipment for Building projects

Excavator, Piling Equipment, Genset, Dewatering Equipment, Concrete Pump, Tower Crane, Passenger Hoist

3. POTENTIAL NEEDS FOR HEAVY EQUIPMENT (2/3)

12

Basic Equipment for Bridges projects

Piling Equipment, Boring for bore pile, Excavator, Concrete Mixer Plant, Mixer Truck, Concrete Pump, Stressing Beam / Girder Equipment, Mobile Crane, Launching Girder Equipment, Gantry Crane

3. POTENTIAL NEEDS FOR HEAVY EQUIPMENT (3/3)

13

Potential Equipment

- ❑ Lifting / Gantry Crane for elevated road
- ❑ Cold Milling for damaged road scrapping works
- ❑ Tunnel Bore Machine for big tunnel works
- ❑ Big/Wide Asphalt Finisher for airport/toll roads
- ❑ Big/Wide Concrete Paver for airport/toll road
- ❑ Bore Pile Machines
- ❑ Dredger for dredging works
- ❑ Asphalt Recycling Plant for green infrastructure works
- ❑ Pipe/Box Jacking equipments



Thank You