

How foreign investors should prepare (and what to prepare) to be able to fulfill and pass the government's local content (TKDN) requirements?



Tenggara Strategics ,
20 April 2021

APAMSI

Asosiasi Pabrikan Modul Surya Indonesia
Indonesian Solar Module Manufacturer Association

Apamsi's Profile

Indonesian Solar Module Manufacturers Association (APAMSI)

Is an association of solar module manufacturers which has integrated production facilities and testing equipment for converting solar cells into solar modules

All Members of APAMSI are PV Module Manufacturers
Established since August 2010

Vision












As a strategic partner for government and stakeholders to provide solar power at a competitive price, affordable, and environmentally friendly

Mission

- Strengthening domestic solar module producers and their derivative products
- Empower people to use solar energy widely
- Ensure the availability of solar energy products throughout Indonesia



Apamsi Secretariat
Jl. Wijaya I No. 71 RT/RW: 10/1;
Petogogan; Kecamatan
Kebayoran Baru;
South Jakarta

	Manufacturer	Production Capacity (MWp)
	PT Adyawinsa Electrical & Power	40
	PT Azet Surya Lestari	45
	PT Len Industri (Persero)	75
	PT Surya Utama Putra	45
	PT Swadaya Prima Utama	40
	PT Wijaya Karya Industri & Energi	50
	PT Sankeindo	45
	PT Deltamas Solusindo	30
	PT Indodaya Citra Lestari	30
	PT Jembo Energindo	50
	PT Sky Energi Indonesia	50

Chairman	:	LINUS A.M SIJABAT
Secretary General	:	JACKSON TANDIONO
General Treasurer	:	ANDI NUGRAHA

500
MWp



Business Development and Promotion Sector

Chairman : Carolus Boromeus (Sky)
Secretary : Yohan (ICA)

Field of Institutional Relations, Regulation & Arbitration

Chairman: Ganda Yudha (Len)
Secretary: Anshar (Adyawinsa)

Human Resources Development, Standardization, and Competence

Chairman: Budi Prasetyo (Wika)
Secretary: Budiman (SUP)



Products and The superiority

International Certificate :

- IEC 61215 : 2016 dan IEC 61730:2016 PolyCrystalline.
- IEC 61215 : 2016 dan IEC 61730:2016 Monocrystalline.
- IEC 61701 : 2011 (Salt mist Corrosion Testing)
- IEC TS 62804-1 : 2015 (PID testing)
- IEC 62716 : 2013 (Ammonia Corrosion Testing)

> 40%

POST INSTALLATION GUARANTEE

DELIVERY TIME GUARANTEE

50.5 MWp (s.d 2020)

QUALITY GUARANTEE

Kap 70 MWp, Apamsi 500 MWp (1000 org)

SOLAR PANEL FRAMED

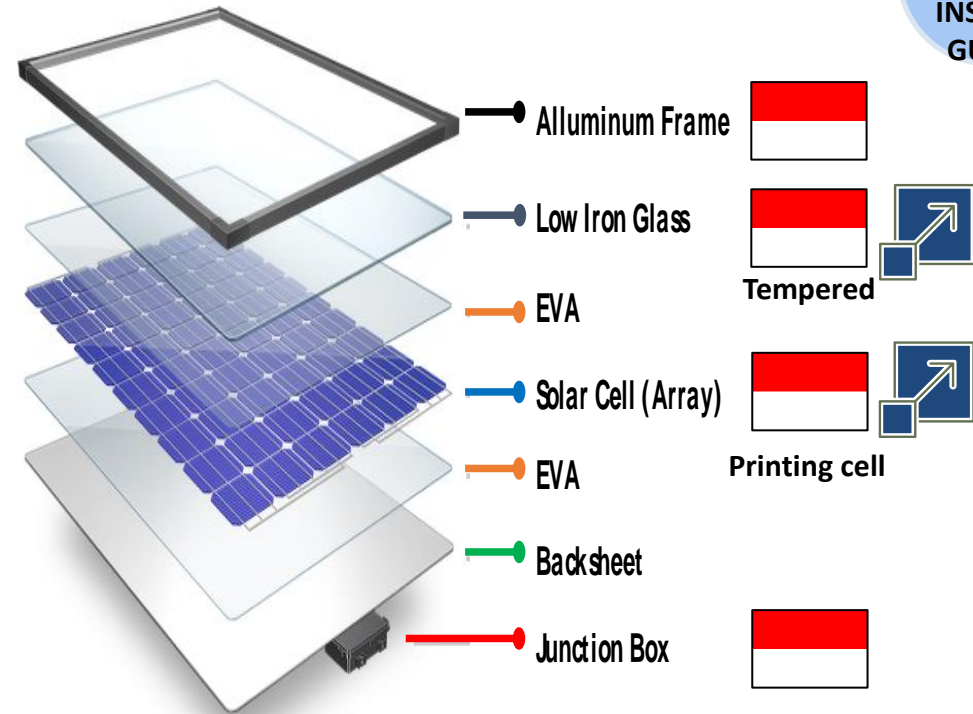
LIGHTWEIGHT FRAMELESS SOLAR PANEL

PERC HALF CELL SOLAR PANEL

SEMIFLEXIBLE SOLAR PANEL

FLEXIBLE SOLAR PANEL

Solar Modules

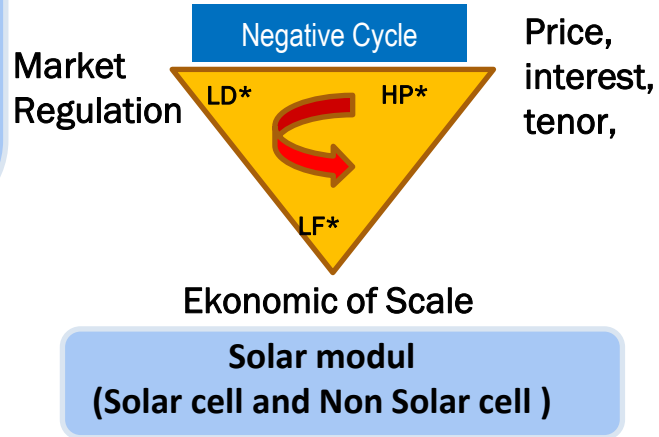


Solar Module Development	Bidirectional Inverter 15kW-1P	Batt S Charger 65A-240V	Bidirectional Inverter 5kW-1P	Grid Tied Inverter 5kW-1P	PLTS DC Grid Semiflexible PERC	PLTS Emergency
91 - '00						
'00 - '10	2011	2012	2014	2018	2019	2020

PLTS Challenging

Some market regulation have improved, but have not been effective

How much incentives can help, if the market is not yet created??



High interest, collateral must be assets, short tenor

60% of the Domestic Content upstream is inhibited

The price of domestic PV is more expensive than Chinese products

Market related prices

Import Raw Material CKD vs FG almost the same

EKSTERNAL

Local Raw Material CKD > FG 3-4 times

INTERNAL

How make this market opportunity come true

PP 79 /2014 about National Energy Policy and Perpres 22/2017 about National Energy General Plan

- PLTS 2025 target : 6,5 GW (Rp.45.5T)
- PLTS 2050 target : 45 GW (Rp 300T)

6.5 GW



Komitmen Global

Target Paris Agreement :
Keep global temperature rise to no more than 2°C, and aim for it to be 1,5°C



Komitmen Nasional

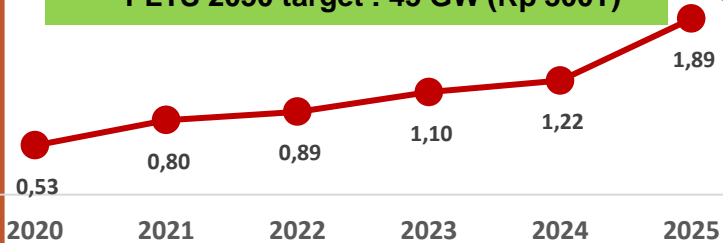
Amanat UU No 16 Tahun 2016 about Endorsement Paris Agreement . Reduce emissions GHG according NDC on 2030:

- 29% from BaU (own abilities)
- 41% dari BaU (International assistance)



Komitmen Sektor Energi

Reduce emission GHG by 314 - 398 Million Tons CO2 on 2030, PP 79/2014 about National Energy Policy & Perpres No 22/2017 about National Energy General Plan: Target 23% RE from Primary Energy Mix & 17% EE from BAU Energi Final



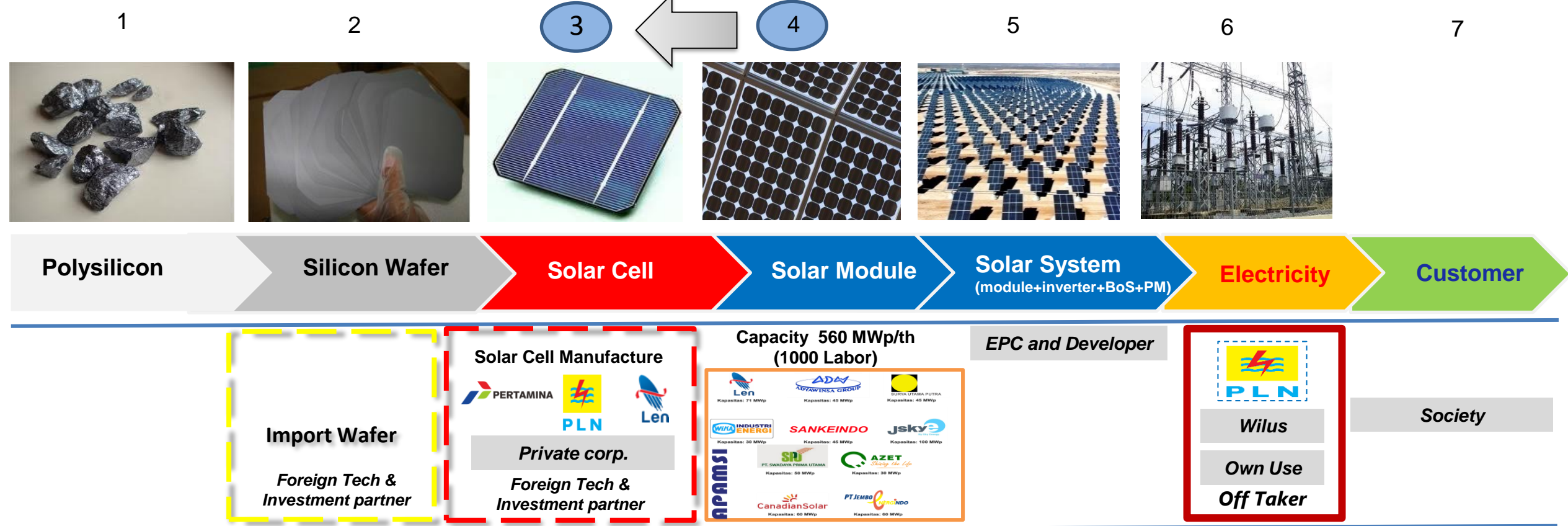
207 GW (EBTKE)

500 GW (Solargis)

655 GW (IESR)



Current Position, Development Plans, and Challenges in the PV Industry Supply Chain In Indonesia



Upstream Industrial Development Plan:

- Business Opportunities
- Absorb Labor
- Efforts to reduce the national electricity BPP
- Limited capacity of domestic entrepreneurs

How foreign investors should prepare



Establishing upstream manufacture with a suitable capacity economic of scale



Sharing market abroad to maintain business continuity so that the domestic market is stable



Manage and guarantee the supply chain so that prices are competitive



Collaboration with testing and certification agencies to increase the capacity of testing laboratories



Bringing funding with low interest rates, long tenors, and light conditions to stimulate the domestic market for the public and developers

Foreign and domestic cooperation is required for products with domestic products of more than 60% whose prices are competitive, the quality is internationally certified, and the market is sustainable



THANK YOU

