



GABUNGAN
PERUSAHAAN
KONSTRUKSI
NASIONAL
INDONESIA

BERSAMA MEMBANGUN NEGERI
YANG LEBIH BAIK

ENGINEERING
SOLUTIONS
FOR A BRIGHTER
INDONESIA

THE NEW EPC COMPETITIVE MODEL 2030

Building Strategic Competitiveness for the Future of Indonesia's EPC Industry

PEOPLE
PROJECTS
PARTNERSHIPS
PROGRESS
A STRONGER INDONESIA

From Project Execution to
Strategic, Intelligent & Sustainable EPC

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Knowledge | Collaboration | Real Impact

STRONGER
INDONESIA
THROUGH
STRATEGIC
EPC



HIGHER
PERFORMANCE



A CLEANER
ENVIRONMENT



STRONGER
SOCIETY



GREATER
OPPORTUNITIES



A SUSTAINABLE
INDONESIA

*Engineering
A Brighter Indonesia*

AGENDA

1. BACKGROUND
2. OBJECTIVE OF WEBINAR
3. EVOLUTION OF THE EPC BUSINESS MODEL
4. EPC STRATEGIC COMPETITIVENESS FRAMEWORK 2030
5. THE FRAMEWORK OF EPC INDUSTRY IN 2030
6. BENCHMARKING EPC GLOBAL
7. TRANSFORMING INDONESIA'S EPC COMPANIES TOWARD 2030
8. TARGET ORGANIZATIONAL EPC 2030
9. NEW EPC COMPETITIVE MODEL
10. INDONESIA EPC ECOSYSTEM PORTFOLIO
11. WHICH AREA AI IMPROVE EPC ?
12. EPC CAPABILITIES ASSESSMENT



BACKGROUND

WHY IS IT DIFFICULT FOR INDONESIAN LOCAL EPC COMPANIES TO ADVANCE AND COMPETE WITH FOREIGN EPC COMPANIES?

Despite the enormous opportunities in Indonesia and the region, Indonesian EPC companies still face significant challenges to achieve global competitiveness.

1



LACK OF LONG-TERM STRATEGIC ROADMAP

Many local EPC companies do not have a clear long-term strategic plan. Even if a plan exists, it is often not consistently executed, as each change of leadership brings different priorities and directions.



2



SHORTAGE OF VISIONARY LEADERS

There is a lack of leaders with a long-term vision, strong integrity, and adequate competence. When leaders do exist, many tend to focus on short-term gains rather than sustainable growth for the company.



3



LIMITED SHAREHOLDER SUPPORT AND ECOSYSTEM

Shareholder support to build a competitive ecosystem is still limited due to constrained capital, limited knowledge or competencies, and bureaucratic hurdles that hinder business development and strategic partnerships.



TOWARDS A MORE COMPETITIVE INDONESIAN EPC



OPPORTUNITIES
AHEAD



STRONGER
CAPABILITIES



BIGGER
COLLABORATION



SUSTAINABLE
GROWTH

*Stronger
Indonesian EPC
for a Sustainable
Tomorrow*

OBJECTIVES OF THIS WEBINAR

Empowering Indonesian EPC Companies for a Stronger, More Competitive and Sustainable Future

*Local Capability
Global Opportunity*

1

FOR LOCAL EPC COMPANIES WITH A COMPLETE EPCC CYCLE

Local EPC contractors in Indonesia that have completed a full value chain EPCC cycle, from Front End Engineering Design (FEED), Detail Engineering, Procurement, Construction and Commissioning.

FEED DETAIL ENGINEERING PROCUREMENT CONSTRUCTION COMMISSIONING



DEFINE THE RIGHT SOLUTION



TURN CONCEPT INTO DETAIL



SECURE THE RIGHT SUPPLY



BUILD SAFELY & ON TIME



START UP FOR VALUE

**PROVEN CAPABILITY
CREATING REAL IMPACT**

2

FOR LOCAL EPC COMPANIES WITH PARTIAL EPCC CAPABILITIES

Local EPC contractors in Indonesia that currently undertake only part of the EPCC value chain are encouraged to gradually close the capability gaps in a realistic and phased manner, leveraging existing resources and strengths.

"Start from where you are, use what you have, and grow step by step."



Towards Full EPCC Capability

COMMISSIONING

CONSTRUCTION

PROCUREMENT

DETAIL ENGINEERING

FEED



LEVERAGE EXISTING RESOURCES



CLOSE GAP GRADUALLY



BUILD COMPETITIVE CAPABILITY

3

FOR LOCAL EPC COMPANIES IN BUSINESS TRANSFORMATION

Local EPC contractors that are currently undergoing or planning business transformation are expected to accelerate their adaptation to a highly dynamic environment, seize new opportunities, and build long-term resilience.

**ADAPT
INNOVATE
TRANSFORM
GROW**



NEW ENERGY & SUSTAINABILITY



DIGITALIZATION & AI



NEW BUSINESS MODELS



STRATEGIC PARTNERSHIP



LONG-TERM VALUE CREATION

**STRONGER
INDONESIAN EPC
FOR A BRIGHTER
TOMORROW**



SHARE INSIGHTS



BUILD COLLABORATION



ACCELERATE SOLUTIONS



CREATE IMPACT



Prepared by
Denny Syahdinal

EVOLUTION OF THE EPC BUSINESS MODEL

Itemize	EPC 1.0	EPC 2.0	EPC 3.0	EPC 4.0
Decision	Experience	Data-supported	Strategic intelligence	AI-augmented decision intelligence
Objective	Complete project	Optimize project	Win right projects	Create sustainable enterprise value
Main Characteristic	Client defines → EPC executes	Execute → Execute efficiently	Bid-to-Win → Select-to-Win	Data + AI + Analytics
Competitive advantage	Technical competence + execution capability + cost	Execution Excellence	Technical + Commercial + Strategic capability	EPC + Ecosystem
Position	Contractor (Operational Capability)	Integrated EPC Contractor	Strategic EPC Partner	Dynamic Eco System EPC
Years	1960s	1980s	2000s	2020s

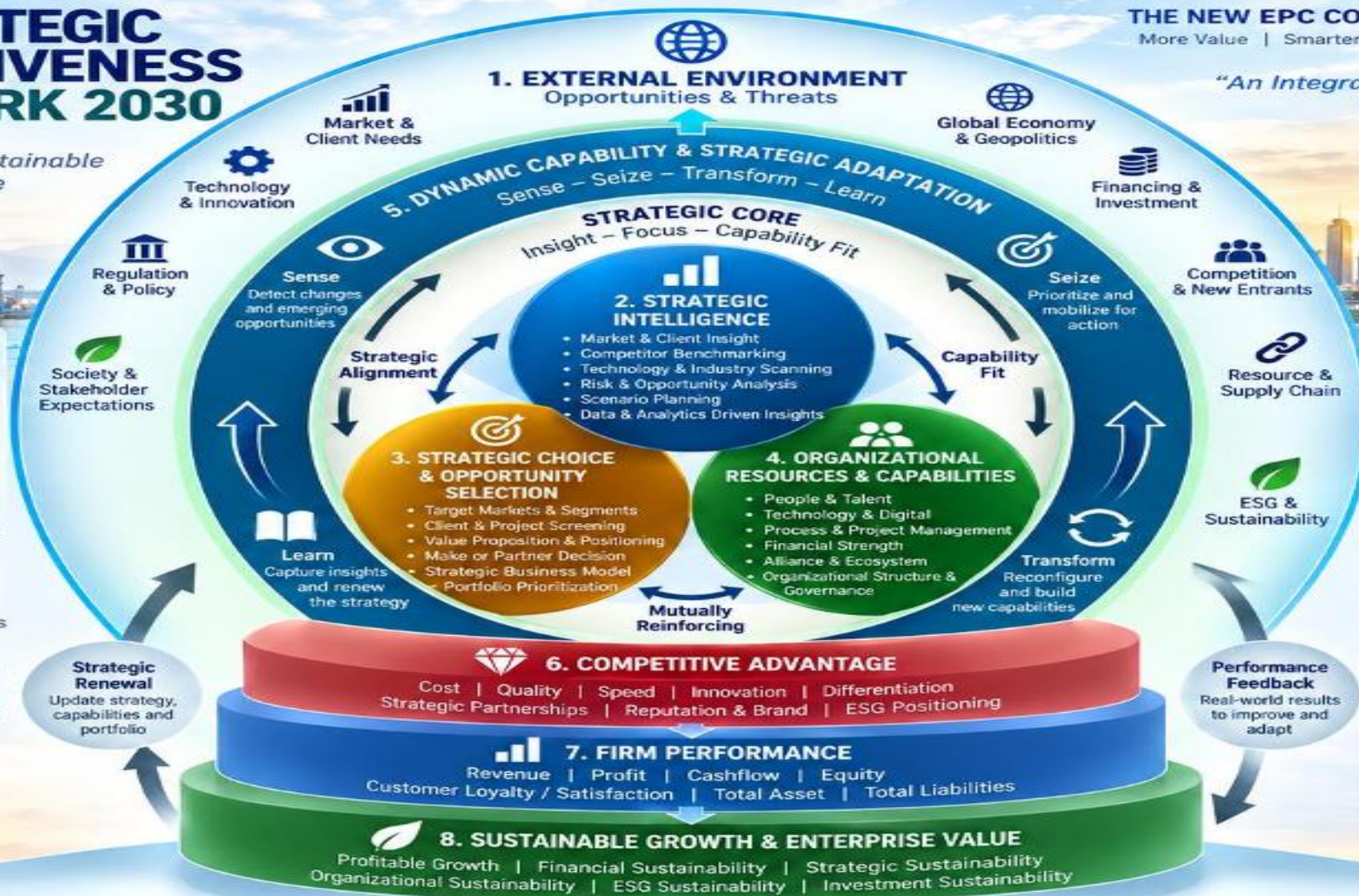
EPC evolution is fundamentally an evolution of organizational capabilities.

EPC STRATEGIC COMPETITIVENESS FRAMEWORK 2030

From Insight to Impact
Building a Stronger, Sustainable
and Globally Competitive
EPC Industry

KEY TRENDS SHAPING EPC 2030

- Energy Transition & Decarbonization
- Digitalization & AI
- Growing Infrastructure Demand
- Geopolitical Realignment
- Supply Chain Disruption & Resilience
- Higher ESG Expectations
- New Business Models (EPC+ / PPP / Alliances)
- Talent & Workforce Shift



THE NEW EPC COMPETITIVE MODEL 2030

More Value | Smarter Solutions | A Sustainable Future

*“An Integrated and Dynamic System
to Create Superior Value,
Resilient Growth and
a Sustainable Future.”*

IMPLICATIONS FOR EPC COMPANIES

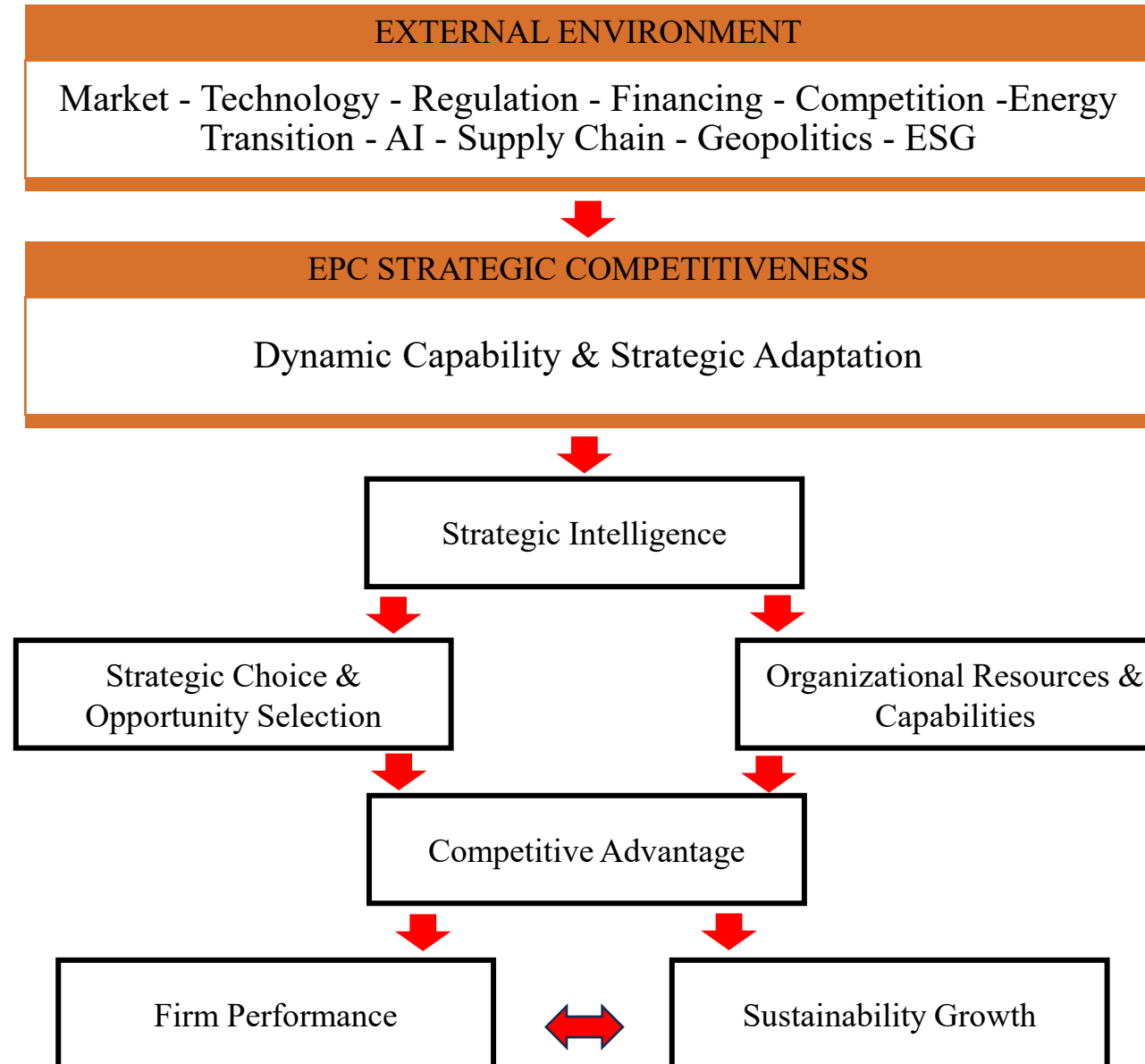
- New Markets & Segments
- More Innovation & Technology Adoption
- Higher Client Expectations
- Stricter ESG & Compliance
- More Complex Projects
- Collaboration & Ecosystems
- Need for Strategic Investment
- Focus on Total Value, Not Just Cost
- Faster Adaptation & Continuous Learning

Engineering A Brighter Indonesia

Draft Designed by **Denny Syahdinal**

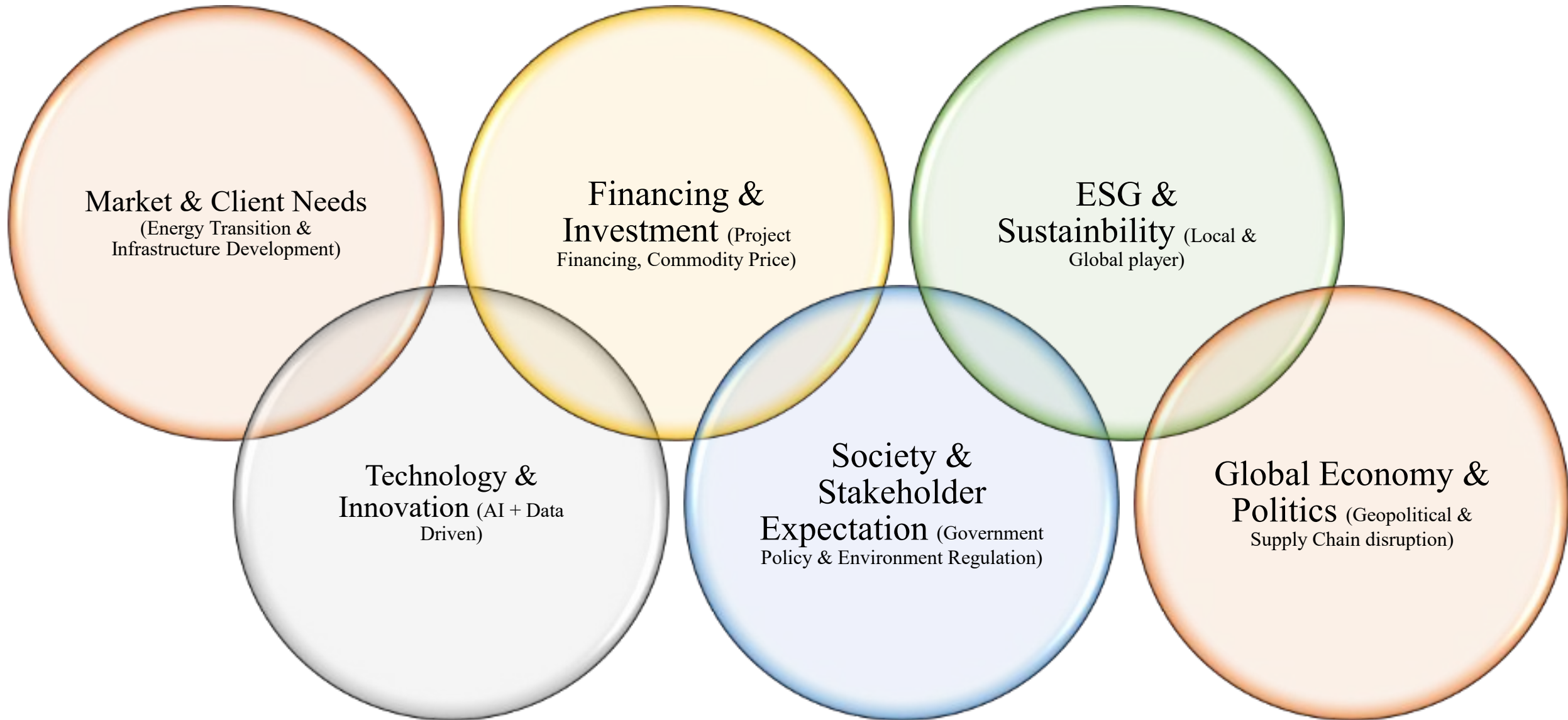
INDONESIA EPC
FOR A BETTER TOMORROW

THE FRAMEWORK OF EPC INDUSTRY IN 2030



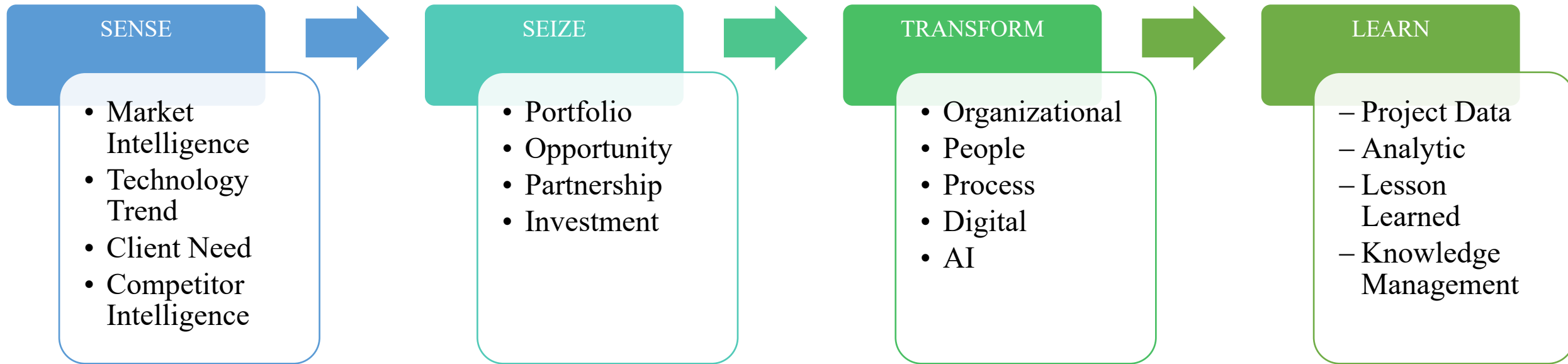
THE FRAMEWORK OF EPC INDUSTRY IN 2030

EXTERNAL ENVIRONMENT



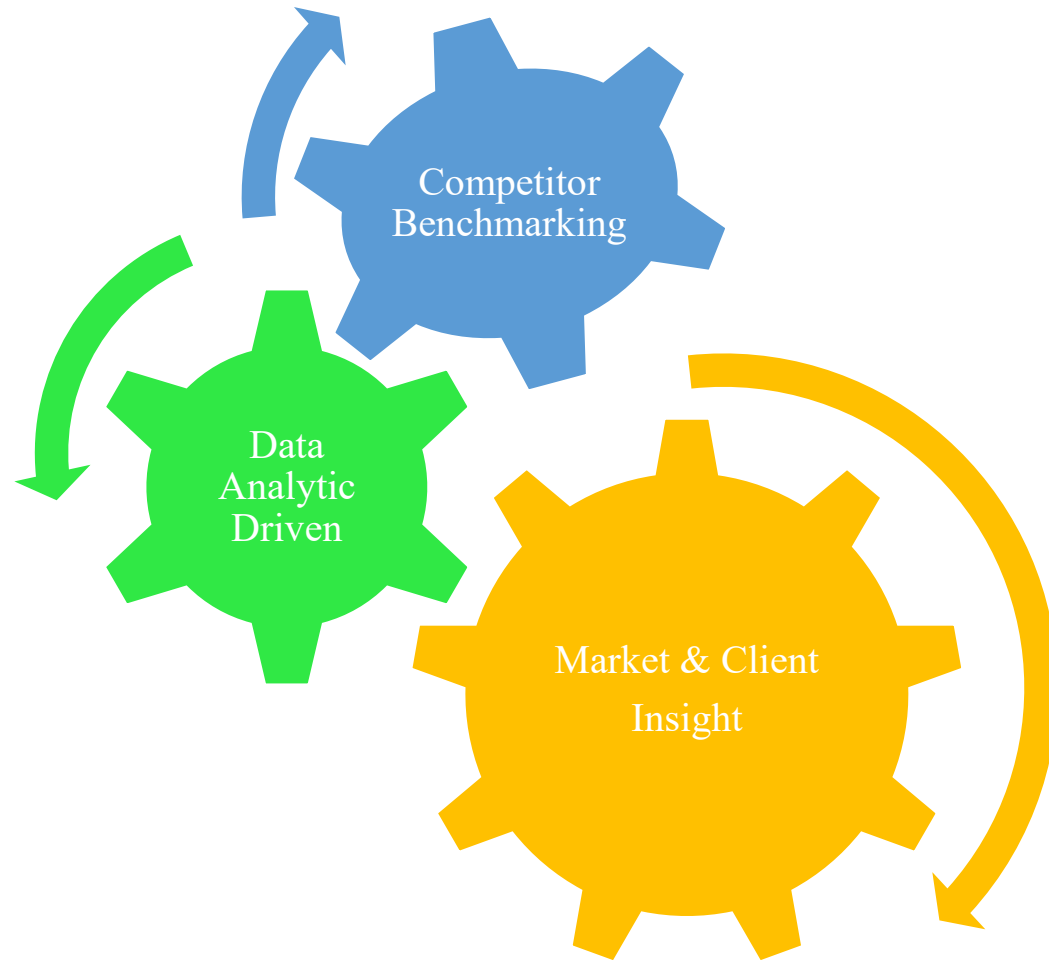
THE FRAMEWORK OF EPC INDUSTRY IN 2030

DYNAMIC CAPABILITY & STRATEGIC ADAPTATION



THE FRAMEWORK OF EPC INDUSTRY IN 2030

STRATEGIC INTELLIGENCE



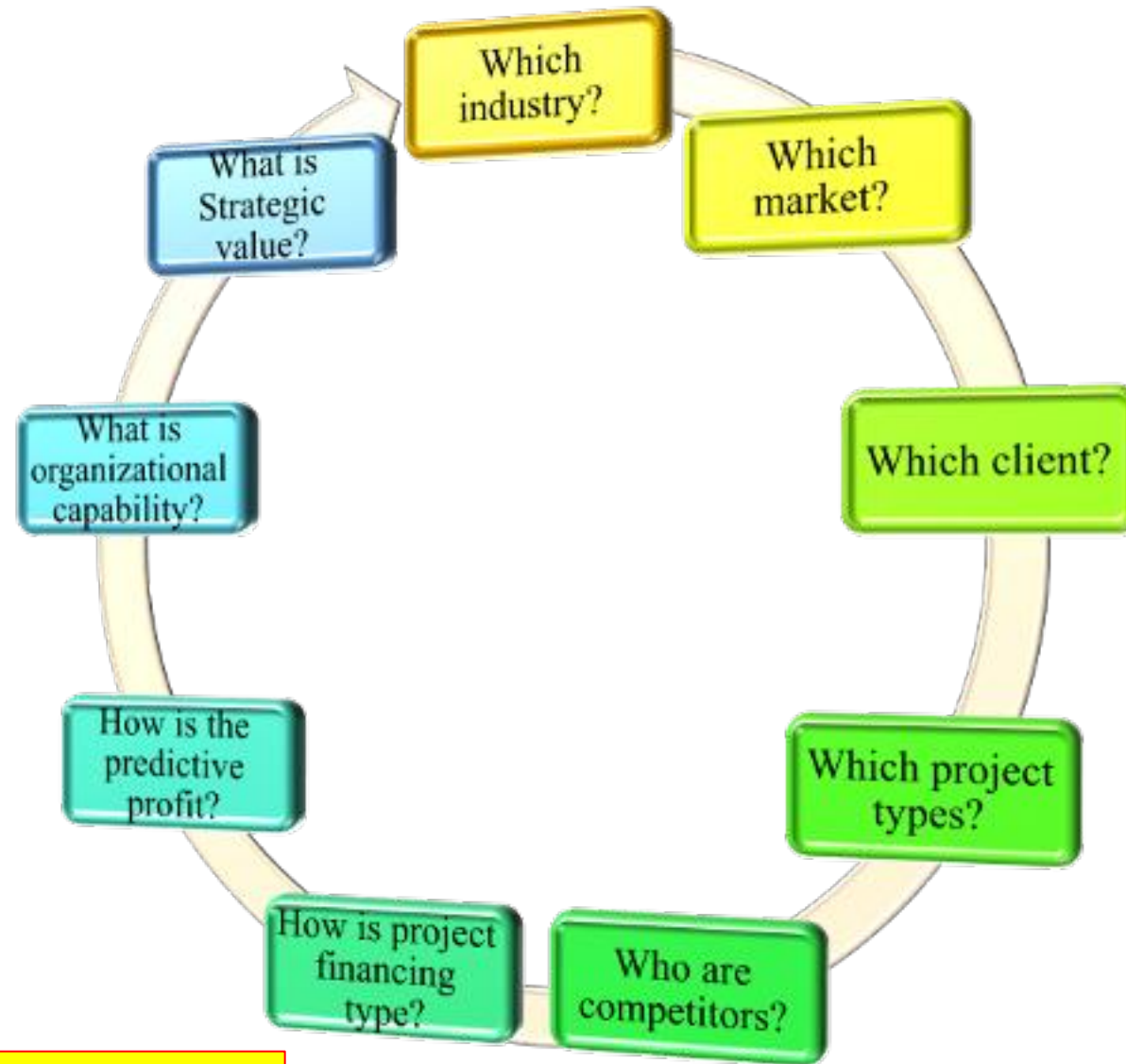
THE FRAMEWORK OF EPC INDUSTRY IN 2030

STRATEGIC CHOICE



THE FRAMEWORK OF EPC INDUSTRY IN 2030

OPPORTUNITY SELECTION



Can we win this project? or Should we compete for this project?

THE FRAMEWORK OF EPC INDUSTRY IN 2030

ORGANIZATIONAL RESOURCES & CAPABILITIES



People & Talent



Organizational
Structure &
Governance



Technology, Digital
& Equipment



Financial Strength



Alliance &
Ecosystem



Process & Project
Management

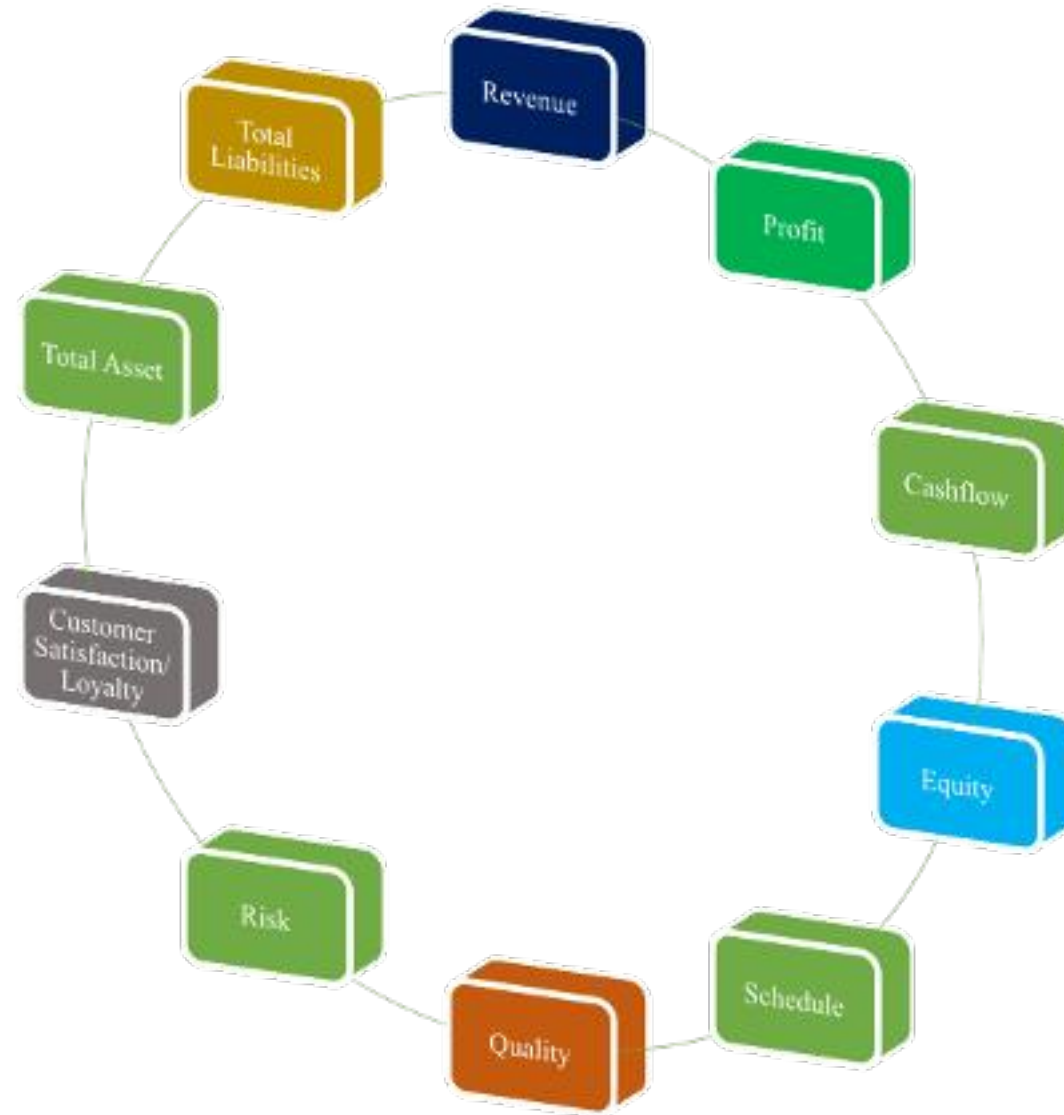
THE FRAMEWORK OF EPC INDUSTRY IN 2030

COMPETITIVE ADVANTAGE



THE FRAMEWORK OF EPC INDUSTRY IN 2030

EPC PERFORMANCE



THE FRAMEWORK OF EPC INDUSTRY IN 2030

SUSTAINABILITY GROWTH



BENCHMARK TECHNOLOGY & ECOSYSTEM

Global Leaders, Real Lessons for a Stronger Indonesian EPC Industry

Different Strengths. A Common Success Formula : $Technology + Ecosystem + Execution = Long-Term Competitiveness$

“Learn from global experience, build Indonesia's own success story”

GLOBAL INSIGHTS
LOCAL IMPACT

BECHTEL	TOYO ENGINEERING	JGC	T.EN TECHNIP ENERGIES	HYUNDAI ENGINEERING	MITSUBISHI HEAVY INDUSTRIES	中国神华 CHINA SHENHUA ENERGY
BUILT TO DELIVER A BETTER TOMORROW	ENGINEERING A SUSTAINABLE FUTURE	TOTAL ENGINEERING FOR A BETTER TOMORROW	TECHNOLOGY FOR A SUSTAINABLE TOMORROW	CREATIVE SOLUTIONS FOR A BETTER TOMORROW	POWERING A BRIGHTER FUTURE	INTEGRATED ENERGY FOR A STRONGER TOMORROW
KEY TECHNOLOGY - Digital EPC & AI - Advanced project execution - LNG, nuclear, energy transition - Modular construction - Automation & robotics	KEY TECHNOLOGY - Process technology - Ammonia & hydrogen - Chemicals & fertilizers - CCU/CCS, energy transition - Modular & innovative solutions	KEY TECHNOLOGY - LNG & gas processing - Process technology - CO₂ capture & low-carbon - Modular construction - Digital EPC (AWP, automation)	KEY TECHNOLOGY - LNG, ethylene & chemicals - Hydrogen & ammonia - CO₂ management (CCUS) - Sustainable fuels - Proprietary technologies (60+), 2,800+ patents, R&D	KEY TECHNOLOGY - AI-based design automation - Smart construction & robotics - Modular/OSC - Hydrogen & new energy - Digital platform & data	KEY TECHNOLOGY - Gas & steam turbines - Nuclear technology - Hydrogen & ammonia - CCUS, renewable energy - Advanced machinery - AI/digital & data center solutions	KEY TECHNOLOGY - Coal mining & clean coal tech - Ultra-supercritical power - Coal chemical (CTO/CTP) - Integrated logistics - Low-carbon & efficiency tech
ECOSYSTEM - Global clients & governments - Technology partners & OEMs - Strategic suppliers - Financing partners - Global supply chain	ECOSYSTEM - Technology licensors - Startups & research partners - Manufacturers & trading co. - Global clients - Integrated business chain	ECOSYSTEM - Technology partners - Licensors & OEMs - Clients & suppliers - JGC Group (manufacturing, consulting, O&M) - Global project network	ECOSYSTEM - R&D labs & pilot plants - Technology licensors & OEMs - Partners & alliances - EPC + products & services - Global clients & consulting	ECOSYSTEM - Hyundai Group resources - Universities & research inst. - Technology partners - Global clients - Suppliers & infrastructure networks	ECOSYSTEM - Manufacturing + engineering - Global customers - R&D and innovation network - Service & aftermarket - Government & strategic partners	ECOSYSTEM - Mine → Railway → Port → Shipping → Power → Chemical - Integrated energy value chain - State support & scale - Domestic market dominance - International expansion
KEY STRENGTH World-class project execution and scale with digital innovation	KEY STRENGTH Technology-to-business ecosystem in chemicals and energy transition	KEY STRENGTH Technology + digital EPC with integrated lifecycle services	KEY STRENGTH Technology + products + EPC + services with strong innovation pipeline	KEY STRENGTH Conglomerate ecosystem with strong digital & new-energy focus	KEY STRENGTH Deep technology ownership with manufacturing and lifecycle services	KEY STRENGTH Vertical integration ecosystem enabling cost efficiency and stable long-term growth

KEY TAKEAWAYS FOR INDONESIAN EPC INDUSTRY



STRENGTHEN
TECHNOLOGY
CAPABILITY



BUILD STRATEGIC
ECOSYSTEM
& PARTNERSHIP



ACCELERATE
DIGITAL & INNOVATION
ADOPTION



DEVELOP TALENT
& ORGANIZATIONAL
CAPABILITY



FOCUS ON
SUSTAINABILITY
& ENERGY TRANSITION



CREATE LONG-TERM
VALUE & GLOBAL
COMPETITIVENESS

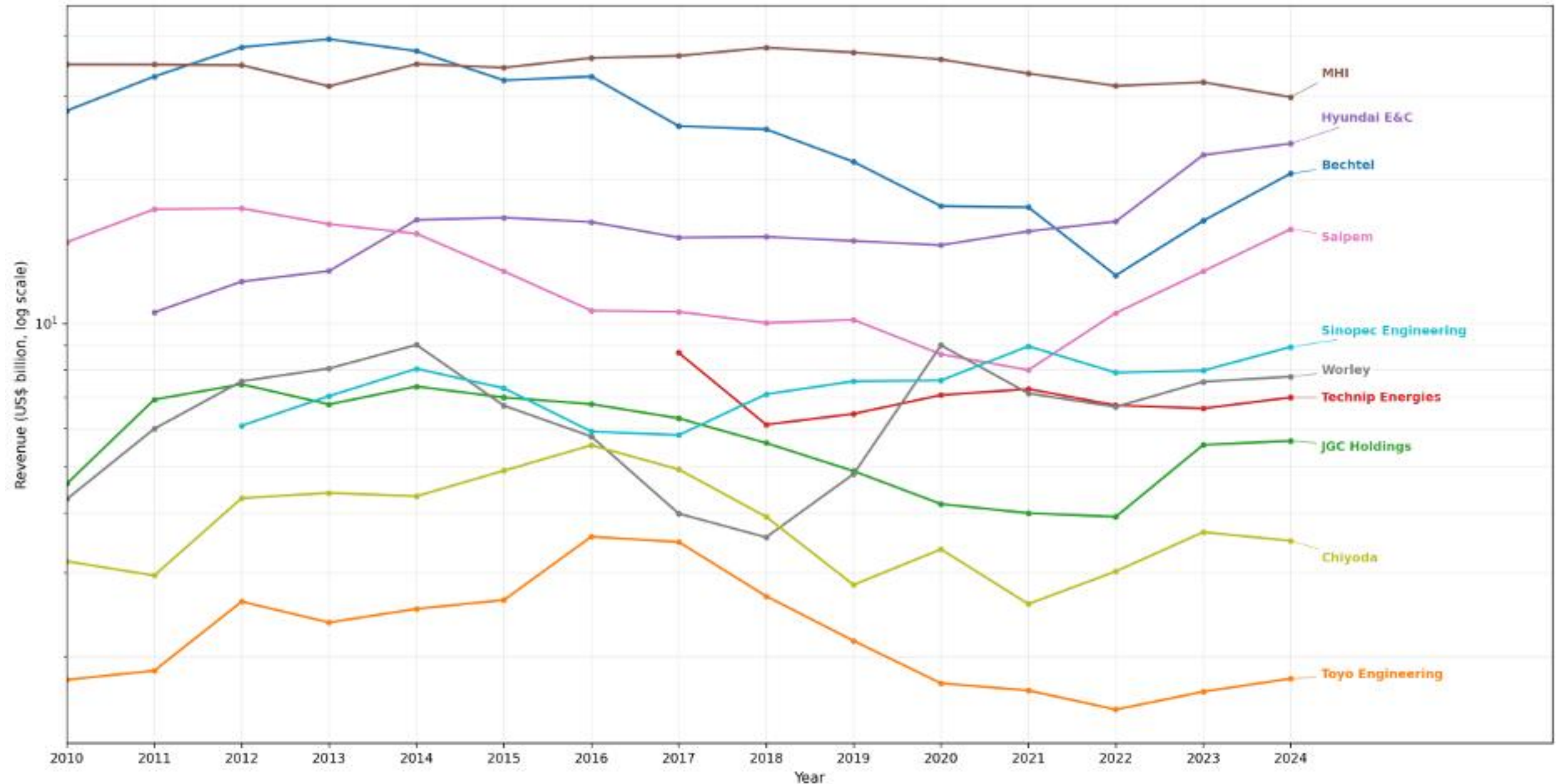
PEOPLE | TECHNOLOGY | ECOSYSTEM | SUSTAINABILITY | A BRIGHTER INDONESIA

Global
Knowledge
for a Stronger
Indonesia

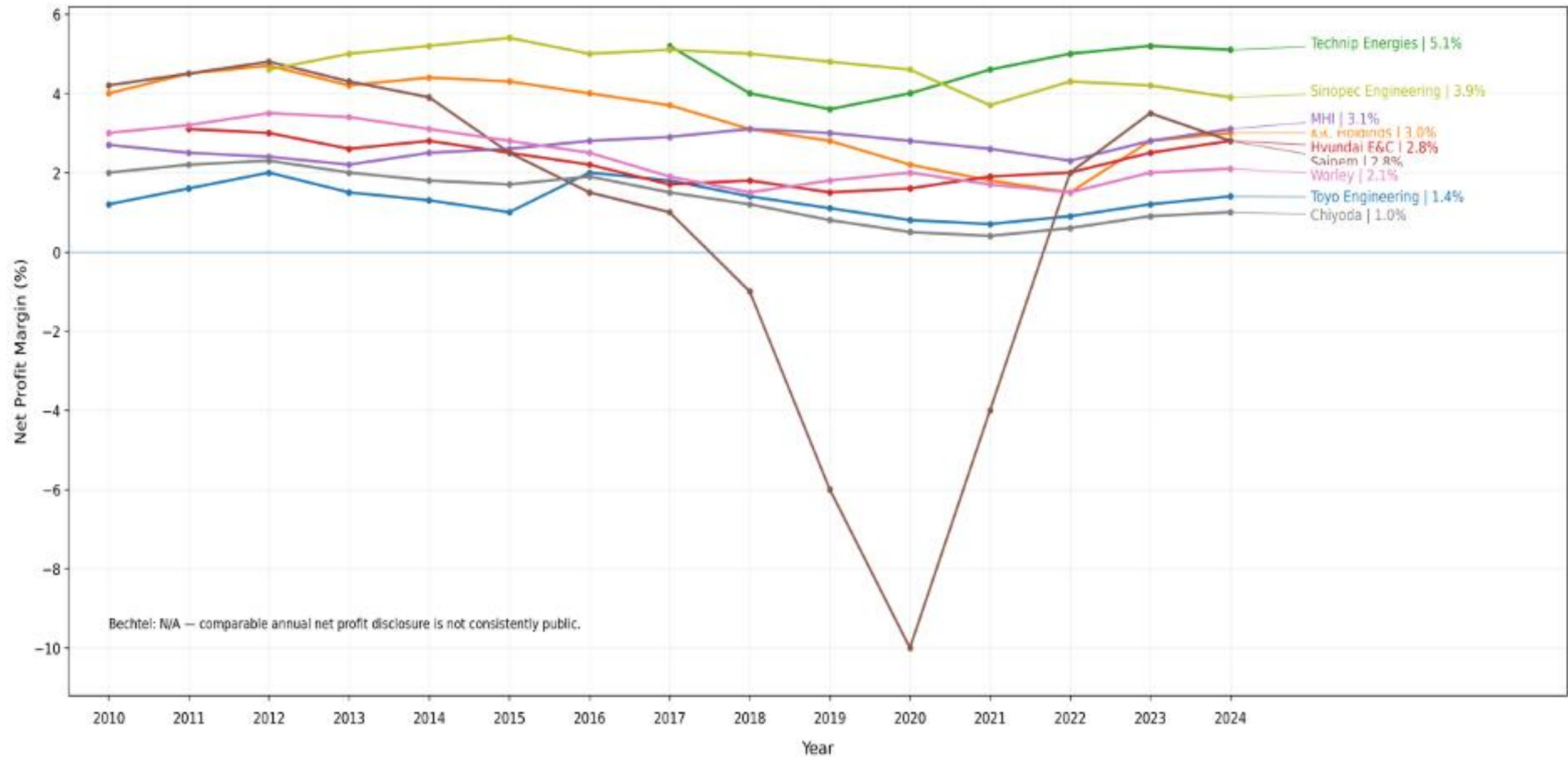
A Stronger
Indonesian EPC
for a Brighter
Tomorrow

Prepared by Denny Syahdinal

Foreign EPC Revenue Benchmark, 2010-2024



Foreign EPC Net Profit Margin Benchmark, 2010-2024



TRANSFORMING INDONESIA'S EPC COMPANIES TOWARD 2030

From Project Execution to Strategic, Intelligent and Sustainable EPC

Stronger Capabilities
Bigger Opportunities
A More Competitive Indonesia



EVOLUTION OF INDONESIA EPC INDUSTRY

EPC 1.0

Project Execution Focus

- Local projects
- Cost-driven
- Limited technology
- Fragmented functions

EPC 2.0

Integrated & Efficient EPC

- Larger and more complex projects
- Better project management
- Improved HSE and quality
- Growing international exposure

EPC 3.0

Strategic EPC Partner

- Selective project portfolio
- Stronger commercial capability
- Strategic partnerships
- Digitalization begins
- Focus on profitability & risk

EPC 4.0

Intelligent, Adaptive & Sustainable EPC

- Technology & AI driven
- Integrated energy solutions
- Sustainable and resilient business model
- Ecosystem collaboration
- High value and long-term growth

"INDONESIAN EPC FOR A SUSTAINABLE AND PROSPEROUS TOMORROW"

EPC TRANSFORMATION PROCESS (2026 – 2030)



A COMPETITIVE, SUSTAINABLE AND GLOBALLY RECOGNIZED INDONESIAN EPC INDUSTRY

TARGET ORGANIZATION STRUCTURE (2030 ORIENTATION)



KEY COMPETENCIES FOR EPC 2030



CAPABILITY BUILDING PROGRAMS



EXPECTED OUTCOMES BY 2030



Contribution to Indonesia's Energy Transition and Net Zero Targets



SELECT TO WIN



BUILD DISTINCTIVE CAPABILITIES



LEVERAGE DIGITAL & AI



COLLABORATE FOR GREATER VALUE



GROW SUSTAINABLY



INDONESIAN EPC COMPANIES 2030

Build Indonesia
Build a Better Future

Draft Designed by Denny Syahdinal

TARGET ORGANIZATION EPC 2030

Integrated • Intelligent • Sustainable • Future-Ready

People, Technology and Collaboration
for a Stronger Indonesia

*Engineering
A Brighter Indonesia*

INDONESIA EPC
STRONGER TOGETHER
FOR A SUSTAINABLE
FUTURE



BOARD OF COMMISSIONERS

Oversight | Governance | Strategic Advice



BOARD OF DIRECTORS

Strategy | Execution | Growth | Sustainability



CLEAN
ENERGY
TRANSITION



DIGITAL
& AI DRIVEN
EPC



INDUSTRIAL
GROWTH
& ENERGY HUBS



TALENT
EXCELLENCE



SUSTAINABLE
INDONESIA

*"From Project Execution
to Strategic Value Creation"*



Corporate Strategy & Business Development (CSBD)

- Corporate Strategy
- Market & Industry Intelligence
- Business Development
- Portfolio Management
- M&A / Strategic Partnership
- Government & Stakeholder Relations
- Corporate Communication

*Shape
Opportunities*



Commercial & Finance (CFO)

- Commercial Strategy
- Bid & Contract Management
- Project Finance
- Financial Planning & Control
- Investment & Treasury
- Cost Management
- Tax & Legal
- Investor Relations

*Create
Financial Value*



Engineering & Technology Solutions (CETO)

- Process & Technology
- FEED & Detailed Engineering
- Digital Engineering (BIM, Digital Twin)
- R&D & Innovation
- Standardization
- Technical Excellence
- Technology Partnerships

*Engineer
a Better Tomorrow*



Project Delivery Excellence (CPDE)

- Project Management
- Planning & Scheduling
- Construction Management
- Quality Management
- HSE Management
- Commissioning & Start-up
- Project Controls (Cost, Schedule, Risk)

*Deliver
with Excellence*



Procurement & Supply Chain (CPSC)

- Strategic Procurement
- Supplier Management
- Supply Chain Analytics
- Logistics & Material Management
- Contract & Vendor Management
- Local Content Development
- Inventory & Warehouse

*Build
Stronger Supply Chains*



Digital, Data & AI (CDDAI)

- Data Strategy & Governance
- Data Engineering & Analytics
- AI & Automation
- Digital Platforms (ERP, CDE)
- BIM & Digital Twin
- Cyber Security
- IT Infrastructure & Cloud
- Innovation & Use Case Development

*Turn Data
into Advantage*



People, Organization & Culture (CPO)

- Talent Management
- Organization Development
- Learning & Reskilling
- Performance Management
- Leadership Development
- Change Management
- Culture & Engagement
- Diversity, Equity & Inclusion

*Empower
Our People*



ESG, HSE & Risk Management (CHSERO)

- ESG Strategy & Reporting
- HSE Excellence
- Enterprise Risk Management
- Climate Risk & Carbon Management
- Compliance & Governance
- Sustainability Projects
- Community & Social Impact

*Operate
Responsibly*

ENTERPRISE CAPABILITIES & ENABLERS (Integrated Across All Functions)



Digital, Data & AI



Integrated
Project Management



Strategic Partnerships
& Ecosystem



Innovation &
Continuous Improvement



Sustainability
& Energy Transition



Knowledge Management
& Lessons Learned

**STRONGER CAPABILITIES
BIGGER OPPORTUNITIES**

**A MORE COMPETITIVE
INDONESIA**

SAME INDUSTRY
DIFFERENT MINDSET
A STRONGER
INDONESIA

"From
Project Execution
on Price ..."

NEW EPC COMPETITIVE MODEL

Transforming Today. Leading Tomorrow.

People | Technology | Collaboration | Sustainability
for a More Competitive Indonesia

SUSTAINABLE
INFRASTRUCTURE
FOR A BRIGHTER
INDONESIA

"... To Strategic
Value Creation
for a Better Future"

OLD EPC MODEL

Market → Bid → Win → Execute → Complete → Repeat

KEY VARIABLES	OLD EPC CHARACTERISTICS	IMPLICATION
 Mindset	Project-driven	Focus on individual projects
 Value Proposition	Low-cost	Compete on price
 Market Approach	Reactive	Wait for opportunities
 Business Development	Tender-based	Respond to RFP/RFQ
 Client Relationship	Transactional	Project-based relationship
 Technology Use	Limited	Conventional tools & siloed data
 Decision Making	Experience-based	Reactive and fragmented
 Risk Management	Project-level	Focus on project risks
 People & Organization	Function-based	Siloed organization
 Success Measure	Project completion	On time, on budget, on scope
 Sustainability	Compliance	Meet minimum requirements

TRANSFORM
TO STAY
AHEAD



NEW EPC MODEL

Sense → Select → Shape → Execute → Learn → Adapt → Grow

KEY VARIABLES	NEW EPC CHARACTERISTICS	VALUE CREATION
 Mindset	Strategy-driven	Long-term value and future readiness
 Value Proposition	Total value	Quality, innovation, sustainability
 Market Approach	Proactive	Sense and shape opportunities
 Business Development	Multi-channel	Co-create solutions with clients
 Client Relationship	Strategic partnership	Long-term and collaborative
 Technology Use	AI & data-driven	Integrated digital ecosystem
 Decision Making	Data & insight-based	Analytical and forward-looking
 Risk Management	Enterprise-wide	Integrated risk and resilience
 People & Organization	Agile & collaborative	Cross-functional and empowered
 Success Measure	Value and impact	Client value, profitability, market position
 Sustainability	Integrated	ESG, energy transition, positive impact

COMPETITIVE EPC COMPANIES 2030



STRATEGIC
GROWTH



INNOVATION
& DIGITAL



TALENT
EXCELLENCE



OPERATIONAL
EXCELLENCE



SUSTAINABLE
IMPACT

Engineering A Better Indonesia

Draft designed by Denny Syahdinal

INDONESIA EPC
FOR A BRIGHTER TOMORROW

FROM PROJECT-DRIVEN TO STRATEGY-DRIVEN EPC

*A New Mindset
A Stronger Indonesia*



Smarter Decisions | Stronger Execution | Sustainable Value

EPC 2030 • A More Competitive Indonesia



STRATEGIC
GROWTH



DIGITAL & AI
ENABLED



PEOPLE
EXCELLENCE



OPERATIONAL
EXCELLENCE



SUSTAINABLE
IMPACT

*Engineering
A Better Tomorrow*

Prepared by Denny Syahdinal

INDONESIA EPC ECOSYSTEM PORTFOLIO

AN INTEGRATED AND COMPETITIVE EPC INDUSTRY FOR A SUSTAINABLE INDONESIA

"From Project Executor to Ecosystem Orchestrator"

STRONGER
INDONESIAN EPC
A BRIGHTER
TOMORROW

CURRENT GAP & CHALLENGES



No consistent long-term strategic roadmap



Limited visionary leaders



Insufficient shareholder support and capital



Limited technology and manufacturing capability



Weak ecosystem and collaboration



Low global competitiveness

INDONESIAN EPC CHAMPION

COMPETITIVE | INNOVATIVE | SUSTAINABLE | GLOBALLY RECOGNIZED

HOLDING / STRATEGIC INVESTMENT PLATFORM

Strategy | Capital | Portfolio Management | Governance | Talent Development | Strategic Partnership



EPC CONTRACTORS (LOCAL CHAMPIONS)

- Engineering & Design
- Procurement
- Construction
- Commissioning
- Project Management
- EPC & EPCm
- International Expansion



MANUFACTURING & SUPPLY CHAIN

- Fabrication (module, skid)
- Pressure vessel, tank, pipe
- Structural steel
- Electrical & instrumentation
- Local content (TKDN)
- Strategic sourcing
- Logistics & supply chain
- Industrial park



TECHNOLOGY & INNOVATION

- Process technology (partnership/licensing)
- R&D and engineering center
- Digital (AI, BIM, Digital Twin)
- Modularization & automation
- Energy transition technology (H₂, CCUS, renewable)
- Local technology development



SERVICES & LIFECYCLE

- Operation & Maintenance
- Turnaround & asset integrity
- Engineering services
- Spare parts & aftermarket
- Asset management
- Decommissioning
- Advisory & consulting



FINANCING & INVESTMENT

- Project financing
- Equity participation
- Infrastructure funds
- Green financing
- Export credit agency
- PPP schemes
- Strategic investors (domestic & international)

ENABLING ECOSYSTEM



Government & Regulators



Clients (BUMN & Private)



Universities & Research Institutes



Technology Partners & Licensors



SMEs & Local Suppliers



Financial Institutions



International Partners

KEY INDUSTRY SEGMENTS (PORTFOLIO)



Oil & Gas



Chemical & Petrochemical



Power (Conventional)



Renewable Energy (Geothermal, Solar, Wind, Hydro, H₂)



Infrastructure (Transport, Port, Water, Urban)



Cement & Building Materials



Mining & Metals (Smelter)



New Energy (CCUS, Hydrogen, Ammonia)

FUTURE IMPACT & COMPETITIVENESS



Stronger & more competitive Indonesian EPC



Higher local value capture & TKDN



Expanded global market presence



Support energy transition & net zero



Sustainable economic growth & job creation



Resilient and future-ready EPC industry

Building
Indonesia's Capability
for a Better Tomorrow

OUR JOURNEY



BUILD FOUNDATION

Strengthen core capability



INTEGRATE ECOSYSTEM

Collaborate for greater value



INNOVATE FOR GROWTH

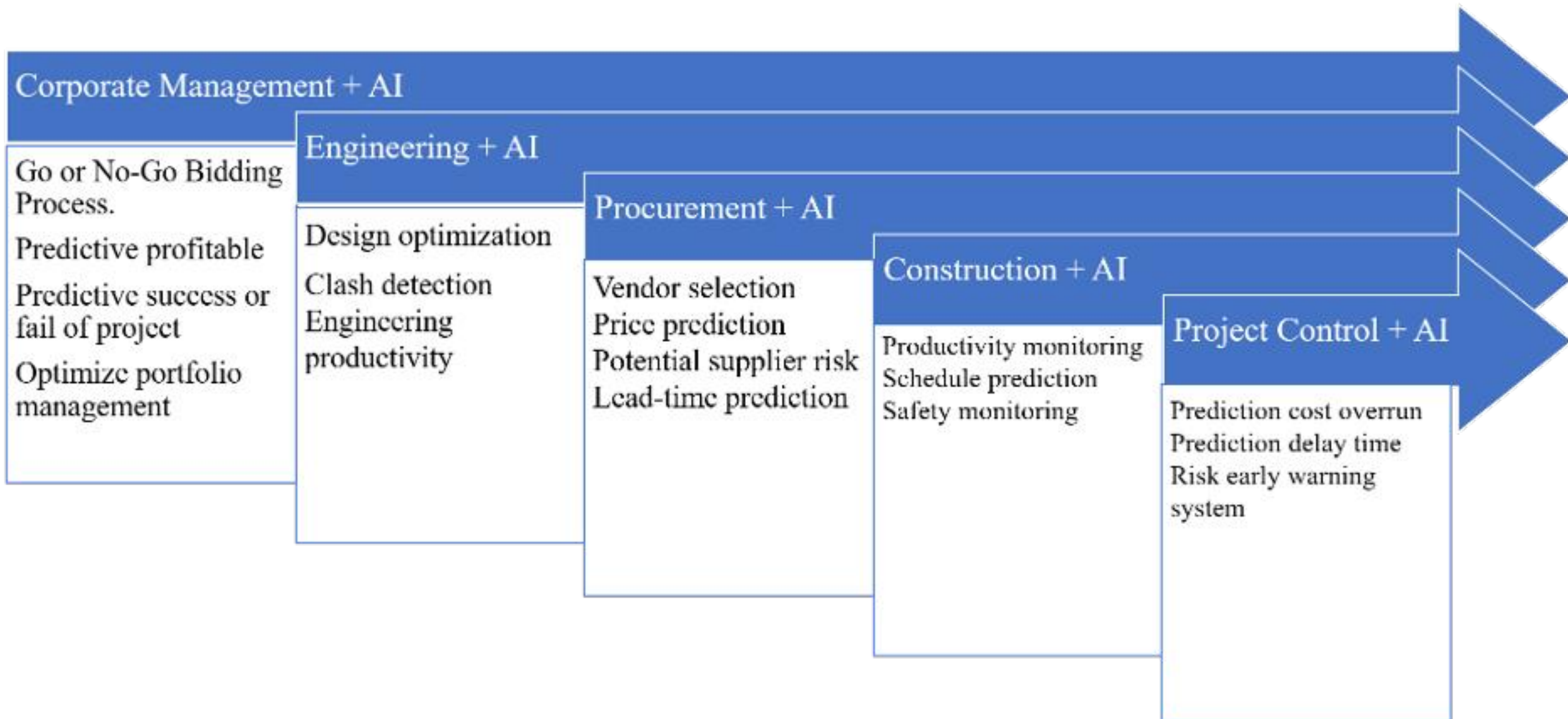
Adopt technology & new energy



EXPAND GLOBALLY

From Indonesia to the world

WHICH AREA AI IMPROVE EPC ?



EPC CAPABILITIES ASSESSMENT

Itemize	Current Capabilities	Required Capabilities	Strategic Response	Target	PIC
1. Talent People	1. Medium	1. High	1. Buy / Make	1. 2026-2027	1. A
2. Technology	2. Low	2. Medium	2. Buy / Make	2. 2028	2. B
3. Financial resources	3. Medium	3. High	3. Make / Buy	3. 2027	3. C
4. Infrastructure	4. Medium	4. High	4. Make	4. 2026	4. D
5. Data Centre EPC	5. Low	5. High	5. Buy / Make	5. 2027	5. E
6. Systems	6. Medium	6. Medium	6. Make	6. 2027	6. F
7. Equipment	7. High	7. High	7. Buy	7. 2028	7. G
8. Brand	8. Medium	8. High	8. Buy	8. 2028	8. H
9. Client relationships	9. Low	9. Medium	9. Make	9. 2027	9. I
10. Supplier network	10. Medium	10. High	10. Make	10. 2027	10. J
11. Intellectual property	11. Low	11. Medium	11. Make	11. 2028	11. K
12. Customer Satisfaction	12. Medium	12. High	12. Make	12. 2026	12. J
13.					
14.					

KEY MESSAGES

EPC STRATEGIC COMPETITIVENESS FRAMEWORK 2030

PEOPLE | INNOVATION | COLLABORATION | SUSTAINABILITY | SHARED PROSPERITY

EPC
A MORE

1



Indonesian EPC companies must have the capability to **accommodate changes in a dynamic environment.**



2



The dynamic changes in the environment require **a high-competitive 2030 strategic model** aligned with those changes.



3



The 2030 strategic model can be successfully implemented when **all stakeholders** in the EPC company execute it based on their respective **functions and responsibilities.**



PROJECTS
LIGHTER
INDONESIA



PLANET



PROSPERITY

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GABUNGAN
PERUSAHAAN
KONSTRUKSI
NASIONAL
INDONESIA

BERSAMA MEMBANGUN NEGERI
YANG LEBIH BAIK

ENGINEERING
SOLUTIONS
FOR A BRIGHTER
INDONESIA

Thank You for Your Participation

*Together, We Build a More Competitive,
Sustainable and Prosperous Indonesia*

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Knowledge | Collaboration | Real Impact



PEOPLE
PROJECTS
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A STRONGER INDONESIA

STRONGER
INDONESIA
THROUGH
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HIGHER
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A CLEANER
ENVIRONMENT



STRONGER
SOCIETY



GREATER
OPPORTUNITIES



A SUSTAINABLE
INDONESIA

*Engineering
A Brighter Indonesia*

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SURVEY KONDISI INDUSTRI EPC LOKAL DI INDONESIA

<https://forms.gle/fcx8tLjL7BNQUGYQ7>

