

Policy Brief

Review of Governance and Accessibility of Financing to The Sustainability of Non- Governmental Palm Oil Plantations

Kajian Tata Kelola Dan Aksesibilitas Pembiayaan Menuju Keberlanjutan Perkebunan Kelapa Sawit Swadaya

RINGKASAN EKSEKUTIF

Petani swadaya menyumbang sekitar 35 persen dari total minyak mentah Indonesia, tetapi produksi petani kecil rendah, secara konsisten menghasilkan 45 persen lebih rendah daripada perusahaan perkebunan. Penelitian ini bertujuan untuk mengkaji tata kelola dan aksesibilitas pembiayaan petani swadaya bagi pekebun terhadap keberlanjutan pertanian kelapa sawit. Metode yang digunakan adalah metode survei untuk memperoleh data dan informasi terkait penerapan tata kelola dan aksesibilitas pembiayaan kelapa sawit rakyat di Provinsi Jambi. Hasil penelitian menemukan bahwa kontrol dan aksesibilitas pembiayaan kelapa sawit petani kecil belum diimplementasikan dengan pengelolaan yang terukur. Hal ini dikarenakan petani kecil sering memulai kegiatan bertani dengan perencanaan yang kurang optimal mulai dari pengadaan input seperti bibit yang tidak bersertifikat dan minim pemeliharaan terkait keterbatasan modal, apalagi tanaman yang sudah memasuki usia tua. Konsekuensinya adalah produktivitas yang lebih rendah daripada produktivitas nasional. Petani kelapa sawit non-pemerintah tidak memiliki daya tawar, dan hanya sebagai penerima harga TBS yang dijual. Kurangnya pendampingan juga berdampak pada keterbatasan pengetahuan manajemen kebun

EXECUTIVE SUMMARY

Independent smallholders contribute about 35 percent of Indonesia's total crude oil, but the smallholders' low output, consistently producing 45 percent less than plantation companies. This research aims to examine the governance and accessibility of independent smallholder financing for planters to the sustainability of palm oil farming. The method used is a survey method to obtain data and information related to the implementation of governance and accessibility of smallholder palm oil financing in Jambi Province. The results found that smallholders' palm financing's control and accessibility have not been implemented with measurable management. This is because smallholders often start their farming activities with less optimal planning ranging from the procurement of inputs such as uncertified seedlings and minimal maintenance related to capital limitations, let alone plants already entering old age. The consequence is lower productivity than national productivity. Non- governmental palm oil farmers have no bargaining power, and only as recipients of TBS prices are sold. The lack of mentoring also impacts garden management's limited knowledge



dan mengganti tanaman tua dan rusak. Selain itu, akses pembiayaan dari lembaga keuangan juga membutuhkan legalitas tanah tersebut, sehingga berbagai pihak harus menanganinya. Ke depan, perlu diakselerasi pemikiran dan sumber daya secara nyata untuk menunjukkan ketidakberpihakan dalam membantu petani kelapa sawit non-pemerintah untuk memastikan keberlanjutan pertanian demi kemakmuran bersama.

1. PENDAHULUAN

Pengusahaan kelapa sawit telah berkembang pesat sebagai respon terhadap permintaan global terhadap minyak dan lemak selama tiga dekade terakhir terutama bagi negara produsen di Asia Tenggara. Indonesia saat ini merupakan produsen terbesar di dunia, memasok lebih dari 40 juta ton minyak sawit mentah, atau 56% dari produksi global pada tahun 2018.

Indonesia sebagai produsen minyak kelapa sawit terbesar di dunia, dimana pekebun swadaya mengelola sekitar 3,1 juta hektar kelapa sawit yang diperkirakan mencapai 40 persen dari total area yang ditanami. Namun pekebun swadaya menghasilkan output yang rendah, secara konsisten seringkali menghasilkan 45 persen lebih sedikit dibandingkan dengan perusahaan perkebunan. Pengusahaan kelapa sawit saat ini menyerap lebih dari 5,5 juta tenaga kerja di sektor *on farm* (perkebunan) dan memberikan devisa sebesar 287 trilyun pada tahun 2018.

Berdasarkan provinsi, dari produksi nasional pada tahun 2018 Provinsi Jambi menyumbang minyak sawit sebesar 5.87 persen dari produksi nasional dengan luas lahan mencapai 8,54 persen dari luas lahan nasional yang memasok 57 Pabrik Kelapa Sawit (PKS) di Provinsi Jambi. Sektor Perkebunan di Provinsi Jambi diusahakan oleh 660.198 Kepala Keluarga pekebun. Sektor ini menyumbang PDRB Provinsi sebesar 17, 2 persen pada tahun 2017. Data menunjukkan luas areal sebesar 791.025 hektar kelapa sawit, 66,66 persen diusahakan oleh pekebun rakyat (PR), 3,01 persen Perkebunan Besar negara (PBN) dan sisanya oleh Perkebunan besar swasta (PBS) (Statistic Bureau, 2020).

and replaces old and damaged plants. Besides, access to financing from financial institutions also requires the land's legality, so various parties must deal with it. In the future, it is necessary to accelerate thinking and resources in real terms to demonstrate impartiality in helping non-governmental palm oil growers to ensure the sustainability of farming for the sake of shared prosperity.

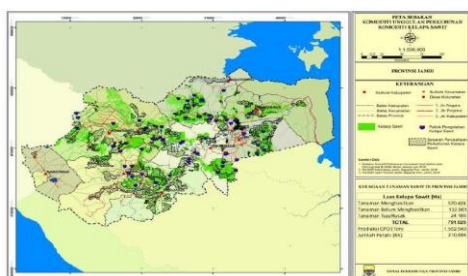
1. INTRODUCTION

Palm oil farming has grown rapidly in response to global demand for oil and fats over the past three decades, especially for producing countries in Southeast Asia. Indonesia is currently the world's largest producer, supplying more than 40 million tonnes of crude palm oil, or 56% of global production in 2018.

Indonesia is the world's largest producer of palm oil, where independent smallholders manage around 3.1 million hectares of oil palm which is estimated to reach 40 percent of the total planted area. But independent smallholders produce low output, consistently often earning 45 percent less than plantation companies. Palm oil business currently absorbs more than 5.5 million workers in *the on-farm sector* (plantation) and provided foreign exchange of 287 trillion in 2018.

Based on the province, from the national production in 2018, Jambi Province contributed palm oil to 5.87 percent of national production with a land area of 8.54 percent of the national land area supplying 57 Palm Oil Mills (PKS) in Jambi Province. The plantation sector in Jambi Province is managed by 660,198 heads of smallholder families. This sector contributed 17.2 percent of the Province's GDP in 2017. Data shows that the area is 791,025 hectares of oil palm, 66.66 percent is cultivated by smallholders (PR), 3.01 percent is by state large plantations (PBN) and the rest by large private plantations (PBS) (Statistical Bureau, 2020)

Gambar 1. berikut menunjukkan peta sebaran komoditas kelapa sawit di Provinsi Jambi



Gambar 1. Peta Sebaran Komoditas Kelapa sawit di Provinsi Jambi

Berdasarkan gambar tersebut dapat dilihat bahwa pengusahaan kelapa sawit tersebar di 8 Kabupaten di provinsi Jambi. Dimana Kabupaten yang memiliki luas perkebunan rakyat paling besar adalah kabupaten Muaro Jambi dengan kontribusi sebesar 21,7 persen, diikuti Kabupaten Tanjung Jabung Barat dan Kabupaten Merangin berturut-turut sebanyak 19,8 persen dan 13,1 persen. Luas Kebun Kelapa Sawit Rakyat 526.822 Ha, dan kondisi tanaman yang sudah masuk masa peremajaan 63.114 Ha. Sedangkan yang berhasil diremajakan baru sebesar 2.309,3483 Ha, artinya baru 6,19% yang berhasil direalisasikan.

Hasil temu mitra BPD PKS di Provinsi Jambi tanggal 18-19 Januari 2019, bahwa pekebun yang telah memperoleh dana, mengalami kesulitan untuk merealisasikan peremajaan serta untuk memulai peremajaan tersebut. Selain itu syarat dan kriteria untuk mendapatkan dana BPD PKS juga menyulitkan pekebun untuk mengajukan proposal dana peremajaan.

Realisasi peremajaan di lapangan baru mencapai kurang dari 10 persen. Rendahnya penyerapan dana dikarenakan syarat pengajuan yang dianggap membentakan pekebun, serat masih minimnya pendampingan bagi pekebun yang akan melakukan peremajaan. Berdasarkan hasil survey di lapangan, pekebun swadaya yang hanya memiliki lahan 2 hektar, khawatir jika mereka melakukan peremajaan akan kehilangan pendapatan. Waktu tunggu tanaman menghasilkan selama tiga tahun, membuat pekebun mempertahankan kebun kelapa sawit yang sudah tua, walaupun produktivitasnya sudah menurun. Kondisi ini mengindikasikan kegiatan penanaman kembali tidak bisa ditunda lagi. Umumnya pekebun tidak atau kurang memiliki akses

Figure 1. The following shows a map of the distribution of palm oil commodities in Jambi Province

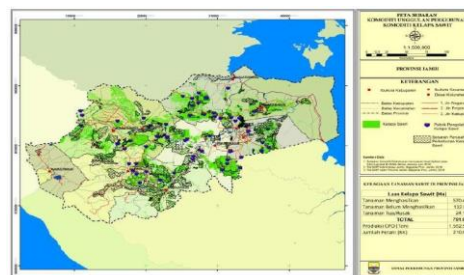


Figure 1. Map of Oil Palm Commodity Distribution in Jambi Province

Based on the picture, it can be seen that oil palm cultivation is spread across 8 districts in Jambi province. Where the regency that has the largest area of smallholders plantations is Muaro Jambi district with a contribution of 21.7 percent, followed by Tanjung Jabung Barat Regency and Merangin Regency respectively as much as 19.8 percent and 13.1 percent. The area of the Smallholders Oil Palm Plantation is 526,822 Ha, and the condition of plants that have entered the replanting period is 63,114 Ha. Meanwhile, only 2,309.3483 hectares have been successfully rejuvenated, meaning that only 6.19% have been successfully realized.

The results of the meeting of BPD PKS partners in Jambi Province on January 18-19, 2019, that planters who have received funds, have difficulties in realizing replanting and to start the replanting. In addition, the requirements and criteria for obtaining BPD PKS funds also make it difficult for planters to submit proposals for replanting funds.

The realization of the field has only reached less than 10 percent. The low absorption of funds is due to the submission requirements that are considered to be empowering for planters, fiber still lacks assistance for planters who will carry out replanting. Based on the results of a survey in the field, independent smallholders who only have 2 hectares of land, are worried that if they carry out replanting, they will lose income. The waiting time for the crop to produce is three years, making smallholders maintain their old oil palm plantations, even though their productivity has declined. This condition indicates that replanting activities cannot be postponed anymore. Generally, smallholders do not have or lack of access



permodalan untuk mendanai kegiatan peremajaan. Untuk itu penelitian ini bertujuan untuk mengkaji tata kelola dan aksesibilitas pembiayaan perkebunan kelapa sawit swadaya bagi pekebun terhadap keberlangsungan usaha tani kelapa sawit.

2. HASIL DAN PEMBAHASAN

A. KARAKTERISTIK PEKEBUN KELAPA SAWIT SWADAYA

Karakteristik pekebun responden meliputi umur, pengalaman berusahatani, tingkat pendidikan dan jumlah tanggungan keluarga. Karakteristik para pekebun responden menggambarkan potensi atau kemampuan yang mereka miliki dalam melaksanakan kegiatan usahatani kelapa sawit.

Tabel 1. Karakteristik Pekebun Responden 2020

Uraian	Satuan	Kisaran Data	Rata-rata
Umur Pekebun	Tahun	32 - 65	53
Pengalaman Berusahatani	Tahun	11 - 35	26
Tingkat Pendidikan	Pendidikan Formal	SD– PT	SD
Jumlah Anggota Keluarga	Orang	3 - 7	4

Umur pekebun dapat menggambarkan kemampuan fisik dan kemampuan mental, semakin muda umur mereka maka fisik juga semakin kuat, begitu pula sebaliknya. Menurut kecakapan seseorang menentukan kinerja seseorang. Seseorang yang lebih cakap tentu saja prestasinya lebih tinggi dibandingkan dengan yang kurang cakap. Semakin tinggi tingkat pendidikan seseorang, maka akan lebih bijaksana dalam pengelolaan usahatannya sehingga produksi akan meningkat baik kualitas maupun kuantitas. Jumlah anggota keluarga mencerminkan kontribusi terhadap pendapatan keluarga sehingga menyebabkan pekebun lebih giat bekerja guna memenuhi kebutuhan keluarga.

B. GAMBARAN UMUM USAHA TANI

Kecamatan Merlung telah mengusahakan kelapa sawit mulai tahun 1990 dan 1993 dengan Program PIR TRANS dan pada saat ini sebagian besar lahan kelapa sawit sudah diremajakan. Luas lahan rata-rata yang dimiliki pekebun adalah 2,44 hektar dengan umur tanaman 1 sampai 29 tahun, sebagian pekebun telah dan sedang melakukan peremajaan. Produksi yang dihasilkan adalah 14.466 kg/ha/tahun,

capital to fund replanting activities. For this reason, this study aims to examine the governance and accessibility of financing for independent oil palm plantations for smallholders towards the sustainability of oil palm farming.

2. RESULTS AND DISCUSSION

A. CHARACTERISTICS OF INDEPENDENT OIL PALM PLANTERS

The characteristics of the respondents included age, farming experience, education level and the number of family dependents. The characteristics of the respondent planters describe the potential or ability they have in carrying out oil palm farming activities.

Table 1. Characteristics of Respondent Planters 2020

Description	Unit	Data Range	Average
Farmer Age	Year	32 - 65	53
Farming Experience	Year	11 - 35	26
Education Level	Formal Education	Elementary – PT	SD
Number of Family Members	Person	3 - 7	4

The age of the planter can describe physical ability and mental ability, the younger their age, the stronger the physical ability, and vice versa. According to a person's proficiency determines a person's performance. Someone who is more capable, of course, has higher achievements compared to those who are less capable. The higher a person's education level, the wiser it will be in managing their farming so that production will increase both quality and quantity. The number of family members reflects the contribution to family income, causing farmers to work harder to meet family needs.

B. GENERAL OVERVIEW OF FARMING BUSINESS

Merlung District has been cultivating oil palm since 1990 and 1993 with the PIR TRANS Program and at this time most of the oil palm land has been rejuvenated. The average land area owned by planters is 2.44 hectares with a plant lifespan of 1 to 29 years, some planters have been and are replanting. The resulting production is 14,466 kg/ha/year,



Ini dipengaruhi oleh umur tanaman, jenis bibit yang digunakan dan proses perawatan kebun meliputi pemupukan, pengobatan dan pemangkasan. Kegiatan usahatani yang dilakukan pekebun tidak terlepas dari peran serta koperasi dan kelompok tani. Kelompok tani sangat berperan penting bagi kemajuan suatu usahatani karena akan lebih mudah mendapatkan atau mengajukan bantuan kepada pihak-pihak terkait apabila terdapat suatu kelompok dibandingkan dengan sendiri-sendiri.

C. TATA KELOLA PERKEBUNAN KELAPA SAWIT SWADAYA

Pekebun swadaya merupakan warga negara Indonesia yang mengusahakan lahan kurang dari 4 hektar yang dikerjakan oleh pekebun sendiri beserta keluarga. Selain itu pekebun swadaya biasanya ditandai dengan penggunaan bibit yang disemai sendiri atau tidak bersertifikat, berkebun kelapa sawit merupakan pekerjaan utama, produktivitas yang masih rendah, memiliki kesulitan untuk mengakses pendanaan, sangat tergantung dengan naik turunnya harga TBS, posisi lahan berpecah-pecah atau tidak terkonsentrasi. Selain itu mayoritas pekebun swadaya tidak tergabung dalam kelembagaan. Sehingga distribusi hasil TBS umumnya dijual kepada para tengkulak.

Pekebun kelapa sawit swadaya di Desa Bukit Harapan Kecamatan Merlung melaksanakan peremajaan melalui KUD Karya Jaya seluas 751,9243 Ha dengan besaran dana hibah dari BDPKS sebanyak Rp. Legalitas lahan menjadi masalah utama yang dibuktikan dengan kepemilikan sertifikat tanah, akta jual beli tanah, dan bukti kepemilikan tanah lainnya yang sah. Karena tidak semuanya memiliki sertifikat lahan sebagai salah satu syarat untuk mengajukan dana hibah tersebut. Legalitas lahan juga sebenarnya menjadi syarat ISPO untuk keberlanjutan perkebunan kelapa sawit pekebun swadaya. dalam Keputusan Menteri Pertanian Indonesia No. 19/Permentan/OT.140/3/2011. Secara ideal, skema sertifikasi ISPO merencanakan agar seluruh pekebun kelapa sawit swadaya di Indonesia dapat tersertifikasi. Dengan demikian tata kelola perkebunan kelapa sawit sebenarnya dapat dilakukan mulai dari tahap penanaman tanaman tua/rusak

This is affected by the age of the plant, the type of seedlings used and the garden care process including fertilization, treatment and pruning. Farming activities carried out by smallholders are inseparable from the participation of cooperatives and farmer groups. Farmer groups play a very important role in the progress of a farming business because it will be easier to get or apply for assistance to related parties if there is a group compared to individually.

C. GOVERNANCE OF INDEPENDENT OIL PALM PLANTATIONS

Independent smallholders are Indonesian citizens who cultivate less than 4 hectares of land that is cultivated by the planters themselves and their families. In addition, independent smallholders are usually characterized by the use of seeds that are sown by themselves or are not certified, oil palm gardening is the main job, productivity is still low, has difficulties in accessing funding, is very dependent on the rise and fall of FFB prices, the position of scattered or unconcentrated land. In addition, the majority of independent smallholders are not members of the institution. So that the distribution of FFB products is generally sold to middlemen.

Independent oil palm planters in Bukit Harapan Village, Merlung District carried out replanting through KUD Karya Jaya covering an area of 751.9243

Ha with the amount of grant funds from BDPKS of Rp. Land legality is the main problem as evidenced by the ownership of land certificates, land sale and purchase deeds, and other valid proof of land ownership. Because not all of them have a land certificate as one of the requirements for applying for the hibah fund. Land legality is also actually a requirement for ISPO for the sustainability of independent smallholder oil palm plantations. in the Decree of the Indonesian Minister of Agriculture No. 19/Permentan/OT.140/3/2011. Ideally, the ISPO certification scheme plans for all independent oil palm smallholders in Indonesia to be certified. Thus, oil palm plantation governance can actually be carried out starting from the stage of felling old/damaged plants



dalam proses peremajaan. Kegiatan pemeliharaan meliputi kegiatan pemupukan dan pengendalian hama serta penyakit sampai tanaman menghasilkan pada tahun keempat. Hal penting lainnya yang harus dipenuhi sebagai wujud tata kelola yang baik adalah penggunaan bibit kelapa sawit bersertifikat. Menurut Dauvergne 2013 tidaklah mudah untuk mengetahui asal usul atau sumber kelapa sawit bahkan dengan konsentrasi tinggi dalam produksi sawit dunia di Indonesia dan Malaysia.

Selama ini fakta di lapangan menunjukkan bahwa pekebun kelapa sawit swadaya membeli bibit kelapa sawit yang tidak bersertifikat. Asal usul bibit kelapa sawit yang ditanam adalah dari pekebun kelapa sawit lainnya yang bibitnya belum jelas legalitasnya, atau bibit kelapa sawit yang mereka gunakan adalah hasil pembibitan secara mandiri oleh para pekebun itu sendiri. Distribusi TBS setelah tanaman menghasilkan juga menjadi factor yang dipertimbangkan dalam tata kelola kebun kelapa sawit swadaya ini.

D. AKSESIBILITAS PEMBIAYAAN PERKEBUNAN KELAPA SAWIT SWADAYA

Produktivitas kebun kelapa sawit swadaya menjadi masalah pekebun kelapa sawit selama ini, dikarenakan tata kelola perkebunan yang tidak optimal. Kondisi ini salah satunya karena pekebun sawit memiliki keterbatasan terhadap sarana produksi seperti bibit, pestisida dan pupuk. Selain itu juga karena Harga TBS yang dijual oleh pekebun dihargai rendah, tidak adanya pendampingan sehingga pengetahuan pekebun sawit tentang pengelolaan kebun dan peremajaan kebun sangat minim. Padahal dukungan pembiayaan dari perbankan dibutuhkan oleh pekebun untuk pengelolaan kebun karena modal sendiri tidak cukup memenuhi syarat Good Agricultural Practices .

Keberadaan dana hibah untuk peremajaan kelapa sawit adalah bentuk pertanggungjawababn pemerintah kepada pekebun kelapa sawit swadaya. Pendanaan sebesar 25 juta / Ha dikhawatirkan pekebun tidak mencukupi karena mereka kehilangan pendapatan selama masa peremajaan. Pekebun swadaya dengan akses keuangan yang baik biasanya lebih baik dalam hal penggunaan pupuk, bahan tanam, dan memiliki produktivitas yang lebih tinggi.

in the process of replanting. Maintenance activities include fertilization and pest and disease control activities until the plant produces in the fourth year. Another important thing that must be fulfilled as a form of good governance is the use of certified oil palm seeds. According to Dauvergne 2013, it is not easy to know the origin or source of palm oil even with a high concentration in world palm oil production in Indonesia and Malaysia.

So far, the facts in the field show that independent oil palm smallholders buy uncertified oil palm seeds. The origin of the oil palm seedlings planted is from other oil palm planters whose seeds are not clear about their legality, or the oil palm seeds they use are the result of independent seeding by the planters themselves. The distribution of FFB from the crops produced is also a factor considered in the governance of this independent oil palm plantation.

D. ACCESSIBILITY OF FINANCING FOR INDEPENDENT OIL PALM PLANTATIONS

The productivity of independent oil palm plantations has been a problem for oil palm smallholders so far, due to suboptimal plantation governance. This condition is one of the reasons why oil palm planters have limitations on production facilities such as seeds, pesticides and fertilizers. In addition, because the price of FFB sold by smallholders is low, there is no assistance, so that the knowledge of oil palm planters about plantation management and plantation replanting is very minimal. In fact, financing support from banks is needed by smallholders for plantation management because their own capital is not enough to meet the requirements of Good Agricultural Practices.

The existence of grants for oil palm replanting is a form of government accountability to independent oil palm smallholders. Funding of 25 million / ha is feared by planters is insufficient because they lose income during the replanting period. Independent smallholders with good financial access are usually better in terms of fertilizer use, planting materials, and have higher productivity



Hal ini menunjukkan bahwa akses keuangan mendorong intensifikasi. Pekebun yang memiliki akses keuangan yang lebih baik juga menguasai lahan yang lebih besar. Kondisi ini juga menggambarkan bahwa akses keuangan mendorong untuk perluasan.

3. KESIMPULAN DAN SARAN

Tata kelola perkebunan kelapa sawit swadaya di Desa Bukit Harapan Kecamatan Merlung masih mengalami berbagai hambatan dimulai dari perencanaan yang kurang optimal seperti pengadaan input meliputi bibit yang tidak tersertifikasi serta pemeliharaan yang minim terkait dengan keterbatasan modal, apalagi tanaman sudah memasuki usia tua. Konsekuensinya adalah produktivitas yang rendah dibandingkan produktivitas nasional. Pekebun kelapa sawit swadaya rata-rata tidak memiliki daya tawar dan hanya sebagai penerima harga TBS yang dijual. Kurangnya pendampingan juga berimbas pada pengetahuan pekebun yang terbatas tentang pengelolaan kebun dan peremajaan tanaman tua dan rusak. Selain itu akses terhadap pembiayaan dari lembaga keuangan juga membutuhkan legalitas lahan sehingga perlu berbagai pihak untuk menanganinya. Tata kelola perkebunan kelapa sawit sebaiknya diinisiasi sebelum pembangunan perkebunan kelapa sawit, setidaknya pada saat sebelum peremajaan sebagai wujud keberlanjutan perkebunan kelapa sawit untuk menjamin kontinuitas pasokan TBS sebagai bahan baku dasar konsumsi dan industri

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This shows that access to finance drives intensification. Smallholders who have better access to finance also control larger land. This condition also illustrates that access to finance encourages expansion.

3. CONCLUSIONS AND SUGGESTIONS

The governance of independent oil palm plantations in Bukit Harapan Village, Merlung District, is still experiencing various obstacles starting from suboptimal planning such as the procurement of inputs including uncertified seedlings and minimal maintenance related to capital limitations, especially since the plants have entered old age. The consequence is low productivity compared to national productivity. Independent oil palm smallholders on average do not have bargaining power and are only recipients of the price of FFB sold. The lack of assistance also has an impact on the limited knowledge of smallholders about garden management and replanting of old and damaged plants. In addition, access to financing from financial institutions also requires land legality, so various parties need to handle it. Oil palm plantation governance should be initiated before the development of oil palm plantations, at least before replanting as a form of sustainability of oil palm plantations to ensure the continuity of FFB supply as a basic raw material for consumption and industry

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