

Indonesia Infrastructure Report Q4 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Indonesia's construction and infrastructure sector will register steady growth over the next decade, driven by the residential and non-residential segment. Land acquisition and financing will remain the major impediments to the implementation of PPP projects.

Latest Updates And Structural Trends

We forecast Indonesia's construction sector to grow 7.2% and 7.3% in 2016 and 2017 respectively, and at annual average of 7.5% over our five year forecast period, with the residential and non-residential construction to post the strongest annual growth rates.

The Agrarian and Spatial Planning Ministry issued Regulation No. 13/2016 on Procedures on Residential Ownership Transfer for Foreign Citizens as a follow up to Government Regulation No. 103/2015. Clearer rules are likely to boost investment in the property sector. Relaxed mortgage rules also provide some potential for pick-up in property demand.

Slow progress on Indonesia's strategic infrastructure projects will keep real growth in the infrastructure sector below 6% in 2016 and 2017, with financing and land acquisition issues being the key obstacles to project implementation.

Indonesia fell 10 positions in the World Bank's 2016 Logistics Performance Index (LPI), from 53rd position in 2014 to 63rd position this year, with the lowest score in the infrastructure category, which reflects a slow progress on several transport projects.

We forecast Indonesia's energy and utilities sector to grow at 4.8% in 2016, rising slightly to 5.4% in 2017. Project delays and uncertainty surrounding project financing will continue to pose major downside risks to our outlook.

The ADB's USD500mn loan to Indonesia for investment reforms and PPPs provides upside potential to the outlook. Another upside risk comes from the consolidation of Jokowi's political position as he now enjoys an outright majority in parliament. This allowed for the passage of the tax amnesty bill on June 28 providing an upside to government revenues from the tax amnesty programme, which in turn will allow for increased infrastructure spend.

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