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Indonesia Power Report Q3 2016

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Abstracts

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BMI View: Despite some significant hurdles facing developers, including financing issues and project delays, we do expect to see continued growth in Indonesia's power sector over the coming years. The country is dedicated to expanding domestic capacity, and while we do not believe existing targets are achievable in their current format, we do expect to see substantial growth in capacity and generation over the forecast period through to 2025. Much of the focus remains on coal-fired power plants, due to Indonesia's extensive natural resources as well as the relatively low cost of development, though we are also seeing a significant number of hydropower, geothermal and renewable power projects in the pipeline.

Latest Updates And Structural Trends

Indonesia saw its first cross-border electricity imports from Malaysia in May 2016. 70MW of power was transmitted to Kalimantan, Indonesia from Malaysia under the ASEAN Power Grid project which is intended to improve access to electricity in the region. In Indonesia, the Brighter Indonesia Program estimates that half of the country's villages do not have access to electricity.

Meanwhile Indonesia's Industry Minister Saleh Husin reported in May 2016 that the country was likely facing an energy crisis from 2020 and the lack of capacity was impacting upon potential investment in the manufacturing sector. As such improving electricity capacity is a priority for the government.

A number of initiatives are underway to expand capacity and improve connections; the government has committed to IDR5trn (USD375mn) of spending on the Indonesia Terang project to improve electricity access for

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10,300 villages in six eastern provinces (Papua, North Papua, Maluku, North Maluku, East Nusa Tenggara and West Nusa Tenggara) by 2019. New capacity is expected to concentrate on renewable sources.

We are maintaining our current forecast for 6.7% annual average growth in total electricity generation between 2016 and 2025 based on a generous project pipeline balanced with the frequent instances of delays to project implementation. Upside risks stem from a potential surge in investment as the government attempts to attract more developers to the power sector in order to meet ambitious energy targets.

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