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CLEAN ENERGY INVESTMENT OUTLOOK

EBTKE CONNEX 2014

Indonesia Clean Energy Development (ICED)

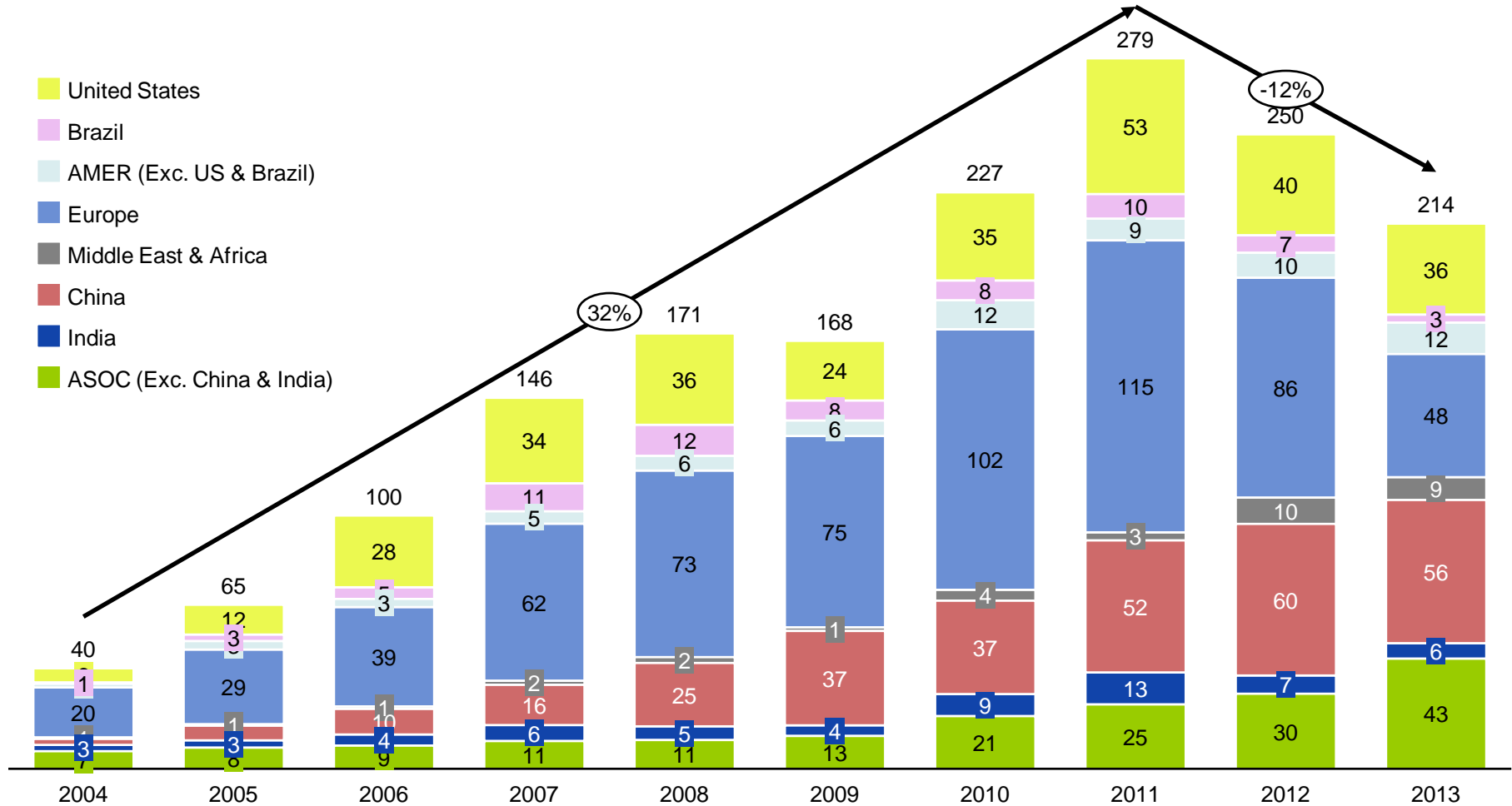
Jakarta, 6 June 2014





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Renewable Energy Investment by Region (US\$ billion)

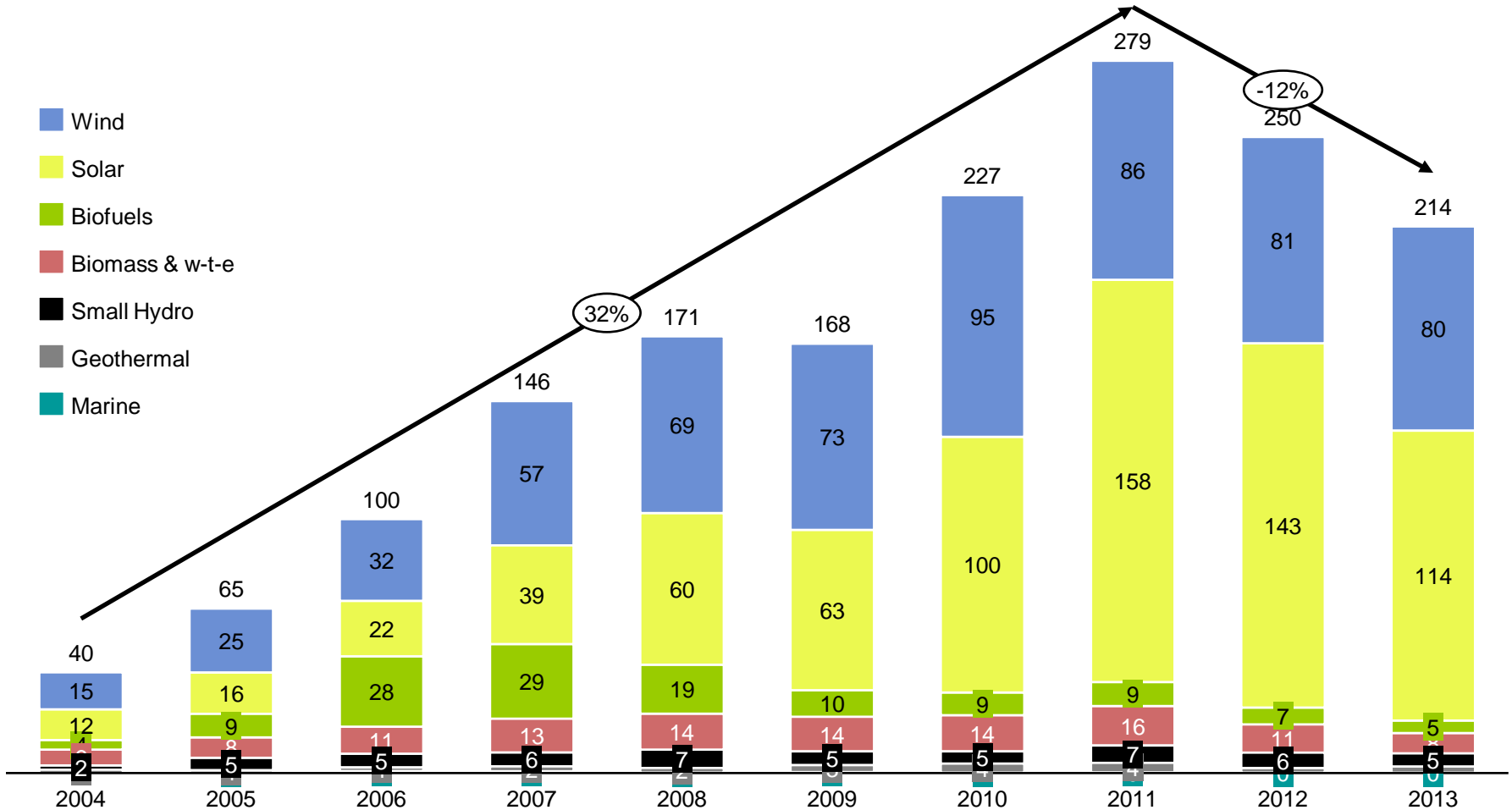


Source: Bloomberg New Energy Finance 2014



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Renewable Energy Investment by Technology (US\$ billion)

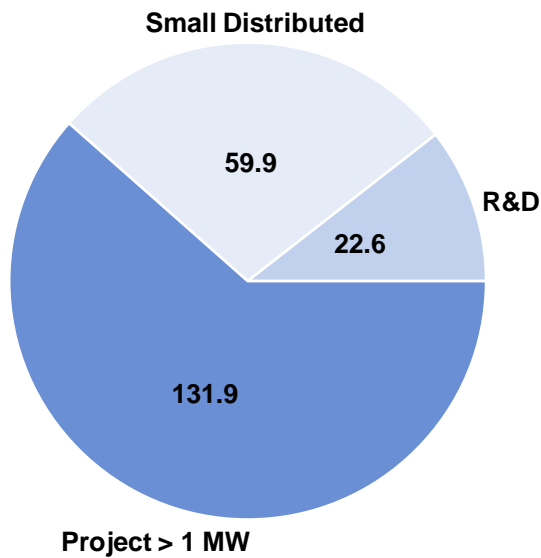


Source: Bloomberg New Energy Finance 2014

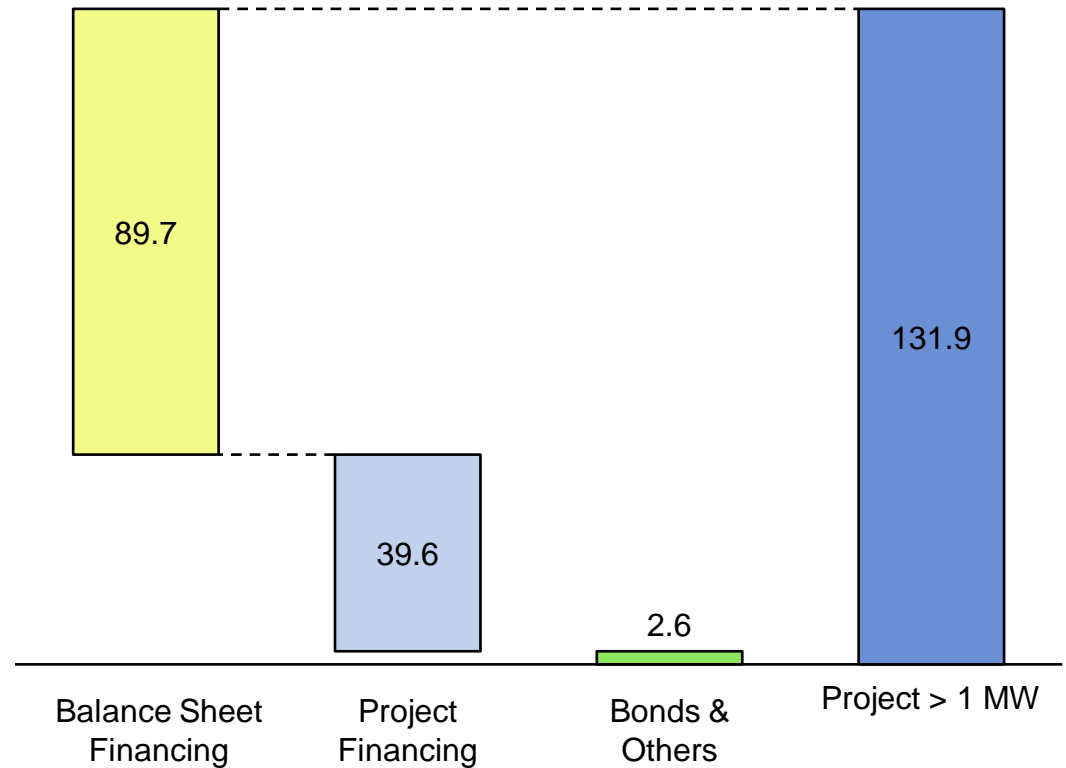


Financing Instrument for RE Projects > 1 MW (2013)

Project Type (US\$ Billion)

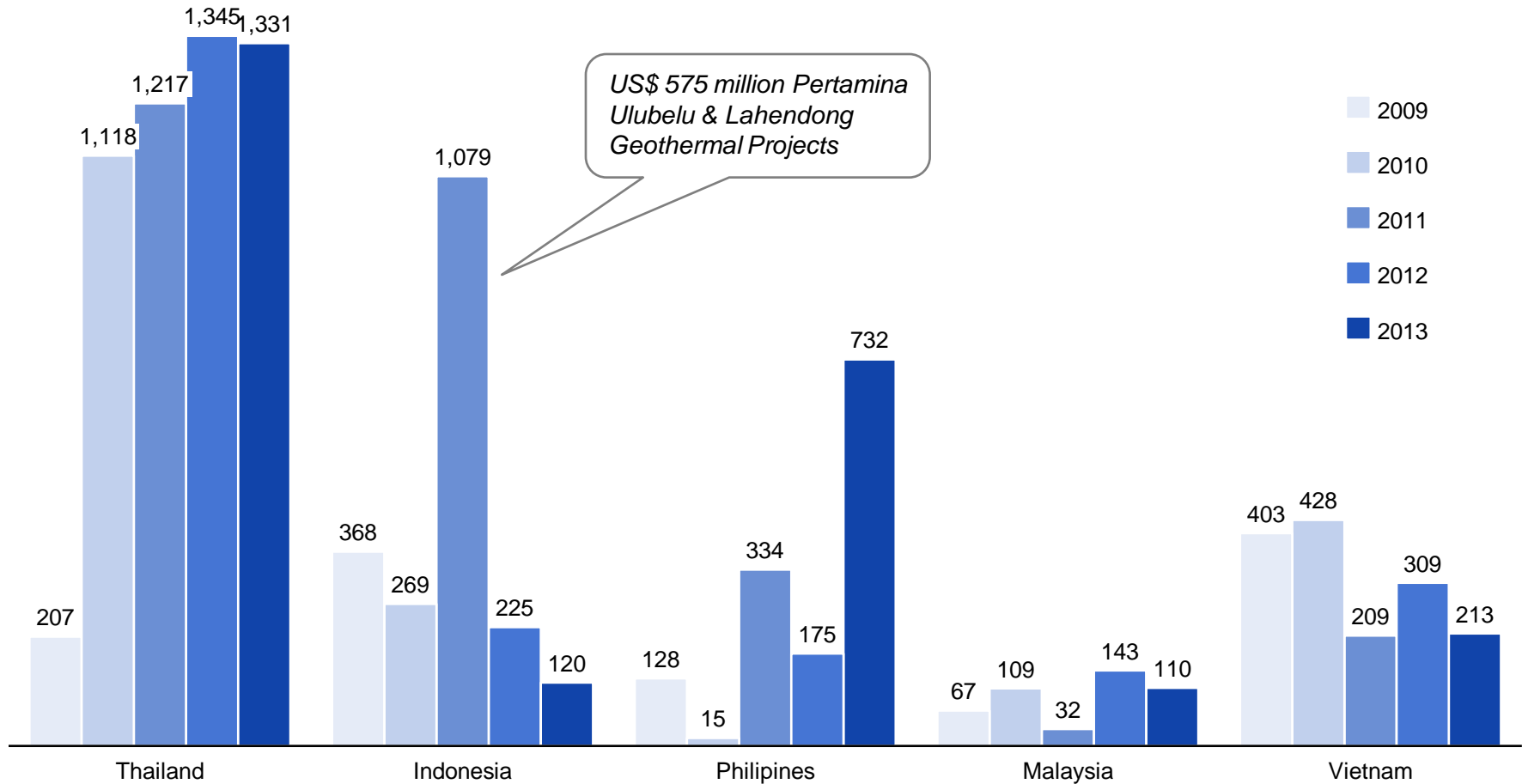


Financing Instruments (US\$ Billion)





Renewable Energy Investment ASEAN (US\$ million)

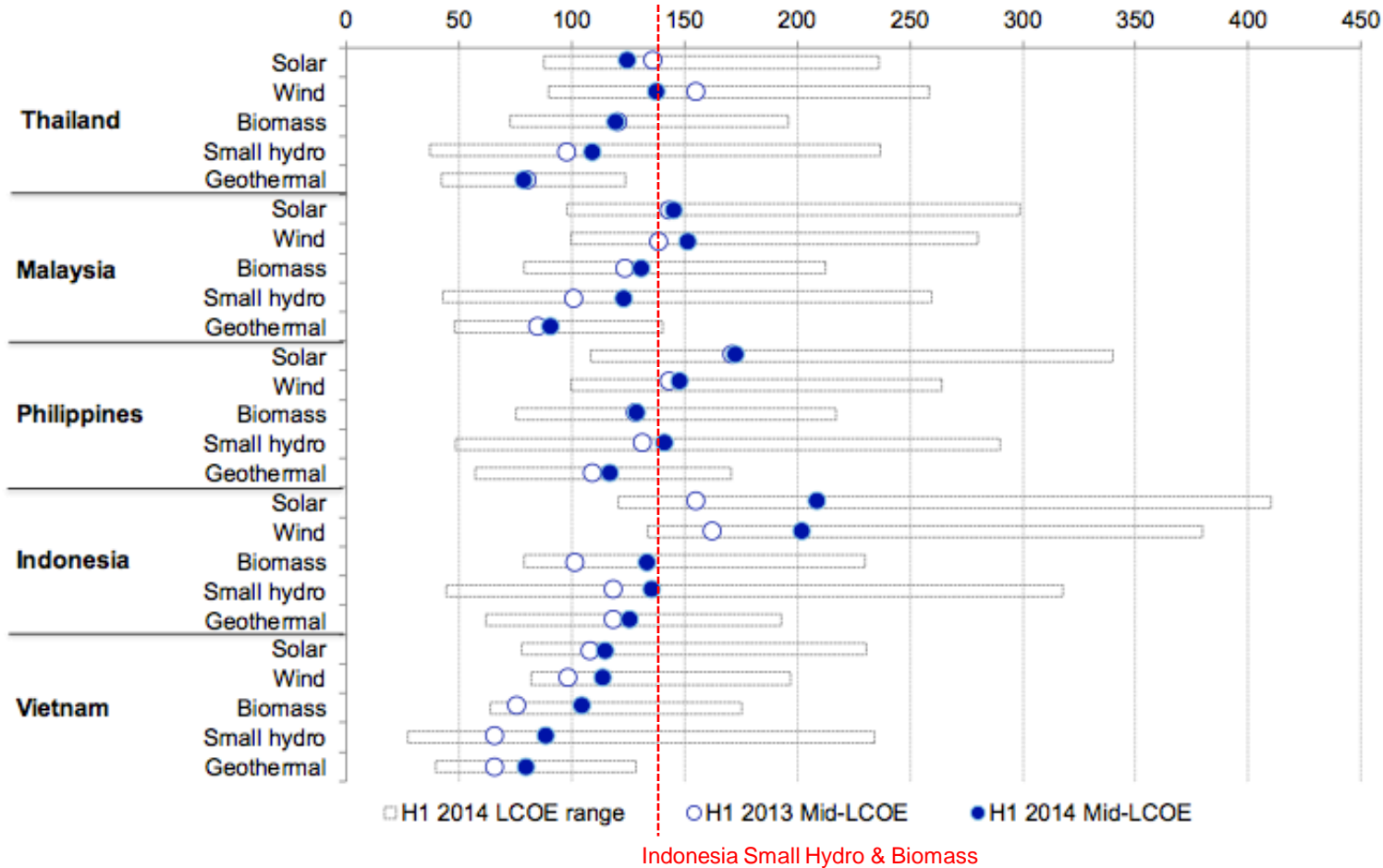


Source: Bloomberg New Energy Finance 2014



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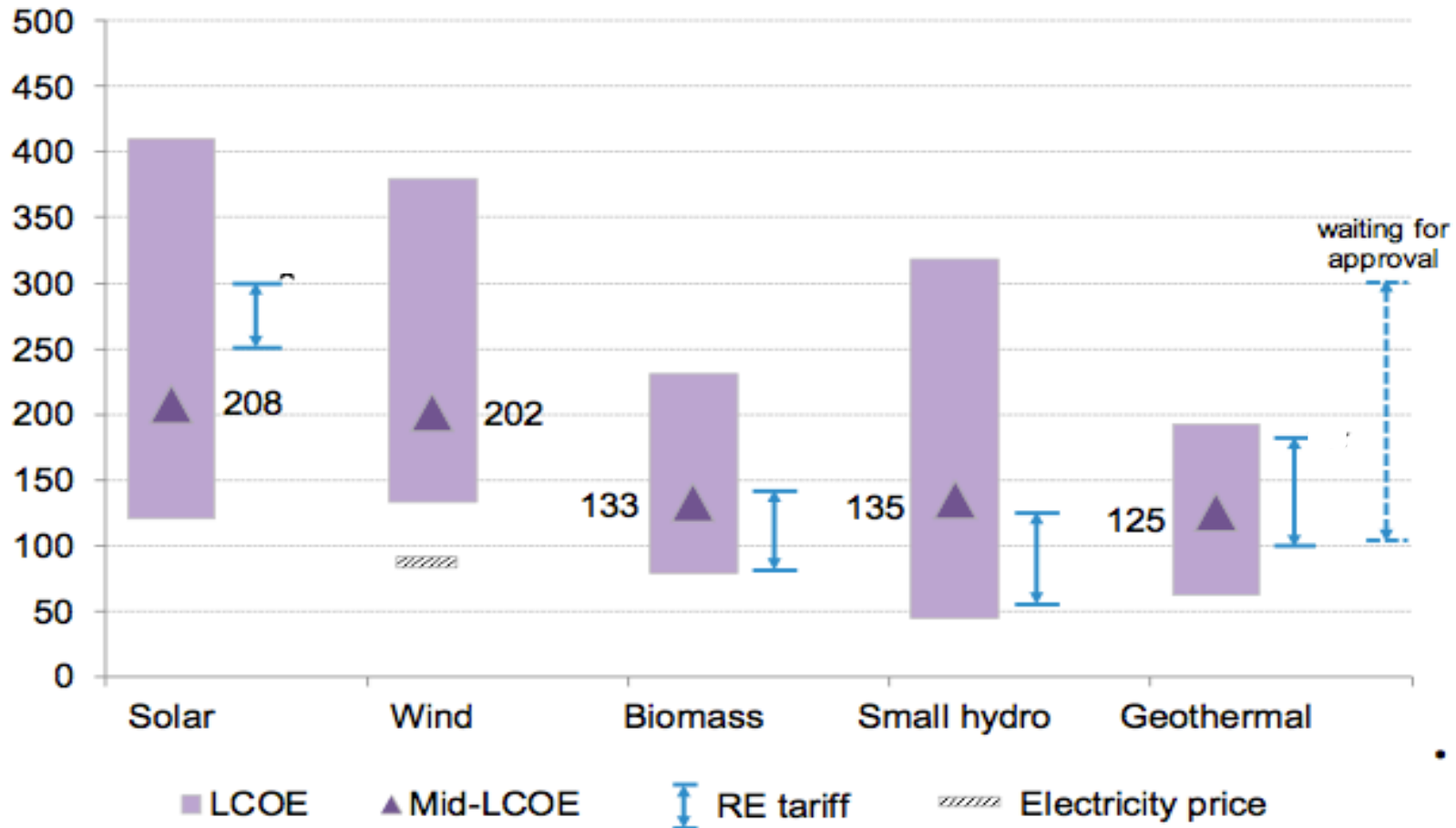
Levelised Cost of Electricity (LCOE) ASEAN US\$/MWh – 2014



Levelised costs per MWh include estimates for the cost of development, construction, operation, maintenance, feedstock purchasing and the financing that made the project possible



Indonesia LCOE Vs RE tariff (\$/MWh) - 2014



Source: Bloomberg New Energy Finance 2014



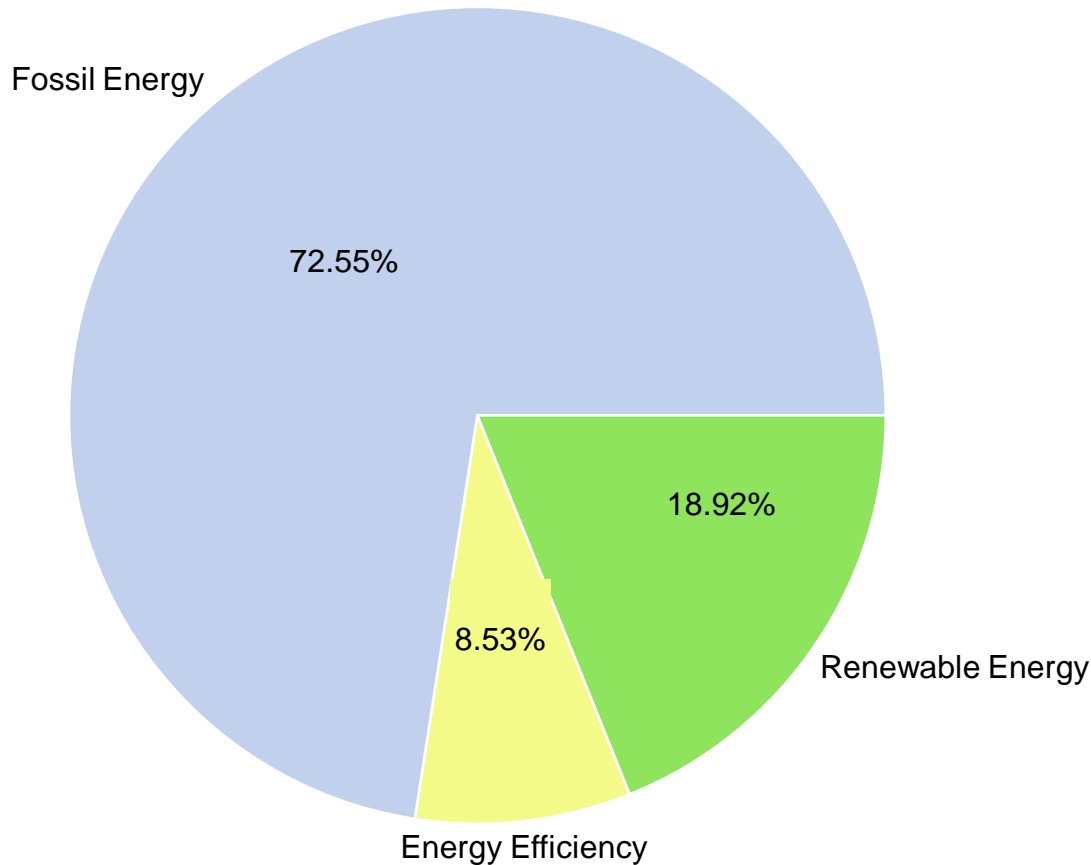
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Indonesia 2014 Outlook Renewable Energy

- New Feed in tariff for Hydro was issued, expected will revitalize some dormant hydro projects
- Indonesia has great geothermal resources but delayed implementation of policies incentives will continue to hold off project development;
- The Solar auction programme is rolling out slowly with state developers projects bidding but private investors hesitating to participate as terms and conditions of the solar PPA's are unclear;
- Wind projects is expected start negotiation of purchase price and finding financial supports;



Comparison Investment: RE & EE Vs Fossil Energy (2012)



Energy efficiency currently lacks the attractiveness of investment in clean energy supply, such as renewables, reflecting different policy frameworks and a set of specific barriers, including small transaction sizes and verification and measurement issues.