

Renewable Energy Market Assessment Report: Indonesia

Few countries offer the renewable energy potential of Indonesia. The country is home to 40 percent of the world's known geothermal resource and offers opportunities in wind, solar, biomass, and hydropower. By 2025, Indonesia aims to install 6.7 gigawatts (GW) of new renewable energy capacity by increasing the proportion of renewables from 7 percent to 15 percent of total energy production.¹

Country Background

Indonesia has a thriving economy at the intersection of the Pacific and Indian oceans, between Asia and Australia. It is home to 240 million people and is the world's fourth-largest country in terms of population. Its territory covers approximately 17,500 islands.² (See Box 1 for more facts.) Eighty percent of the population lives on

the islands of Java and Bali; the rest is scattered widely among the country's 6,000 other inhabited islands. Indonesia's economy grew 4.3 percent in 2009, in line with the country's 3-6 percent growth rate since the Asian financial crisis of the late 1990s.³ Future growth is likely to accelerate as the world recovers from the global recession of 2008-2009.

Although Indonesia lacks strong policy incentives for renewable energy, it provides companies with a stable political system and a growing economy in which to do business. Projects range from large-scale power plants with power purchase agreements (PPAs) negotiated with PLN, the state-owned utility company, to development projects coordinated by multilateral development banks or local governments. Competition often



Source: Central Intelligence Agency, *The World Factbook*.



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INTERNATIONAL
TRADE
ADMINISTRATION

Box 1. Country Quick Facts

Size: 1.9 million square kilometers

Population: 240.3 million*

Type of Government: Democratic republic

President: Susilo Bambang Yudhoyono

Capital: Jakarta

Religion: Muslim (86 percent)

Language: Bahasa (a modified form of Malay)

Economy: Capitalism

* Estimate from Central Intelligence Agency, *The World Factbook*.



comes from foreign development agencies, which feed projects directly to their domestic industries through development aid and export loans.⁴

U.S. companies have been active in Indonesia for years and have developed significant working relationships with the Indonesian government and private sector. For companies that are new to exporting, working with an established U.S. partner can be an effective means of entering the market. For companies interested in joint partnerships, Indonesian firms are often willing to cooperate, but few have the capacity or capital required to develop large-scale renewable energy projects.

The government of Indonesia realizes that foreign direct investment (FDI) is critical to economic growth and seeks to create an investment climate that is capable of attracting foreign investors.

Coupled with a sound fiscal policy and strong domestic consumption, this commitment has increased foreign interest in the Indonesian market. However, investors still face significant challenges, which include import restrictions, insufficient infrastructure, and regulatory uncertainty. As a result, FDI has thus far not kept pace with domestic production.

Status of Energy Market

Since 2000, Indonesia has transitioned from a robust energy exporter to an importing nation that, for the first time, is concerned with rising production costs, energy subsidies, and climate change. The transition has spurred a new commitment to renewable energy, domestic production, and environmental sustainability. In 2008, fossil fuels provided 93 percent of the economy's total energy capacity (29.5 GW). But unlike previous years when excess energy was exported to neighboring markets, aging wells and limited investment forced Indonesia to import oil and to eventually remove itself from the Organization of the Petroleum Exporting Countries (OPEC). Similarly, Indonesia was once the world's leading exporter of natural gas, but now ranks 56th because investment restrictions and contract uncertainty caused new production to go undeveloped.

To appease local energy consumers, the government has maintained high-energy subsidies for the country's energy consumers. When supply was high and demand low, the subsidies stimulated economic growth with low, stable energy prices. But as demand began to outpace supply, the subsidies became a burden on the nation's fiscal budget and a deterrent to investments in cleaner, renewable resources. In 2008, subsidies exceeded \$20 billion. As oil prices declined, subsidies decreased to \$10 billion in 2009 but are expected to increase again in 2010. In addition, Indonesia's fuel subsidies have the negative consequence of making growth itself an unaffordable expense to the government of Indonesia, which must pay more money for every new unit of electricity sold—money that is not spent on economic growth needs or social programs.

In response to the fiscal challenges imposed by the country's energy subsidies, the government announced a "Crash Program" to produce 20,000 megawatts (MW) of additional energy in 2004. Phase I of the program was confined to coal-fired electricity that was sourced primarily from China.⁵ Phase II includes a preference for renewable energy production and includes a guarantee for "off-take" PPAs by PLN.

Phase II will likely include a greater emphasis on independent power producers. Unfortunately, without changes to policy and regulation, it is unlikely that Phase II will garner a significant influx of foreign investment. Many of Indonesia's state-owned enterprises will continue to dominate the large-scale power generation sector for several years. The U.S. Department of Commerce, however, expects a significant opportunity for foreign equipment and services suppliers to provide technology or expertise for large renewable energy projects.

After the Crash Program, the government of Indonesia expects a 56 percent increase in overall energy investments by 2014.⁶ Investments will likely leverage private investment with public money to focus on increasing energy reliability and to meet

the government’s 90 percent electrification target by 2020. To further international investment in the renewable energy sector, the GOI recently announced a \$0.097 per kWh feed-in tariff for geothermal energy and the creation of a new \$400 million fund to help with the development of the country’s geothermal resources.

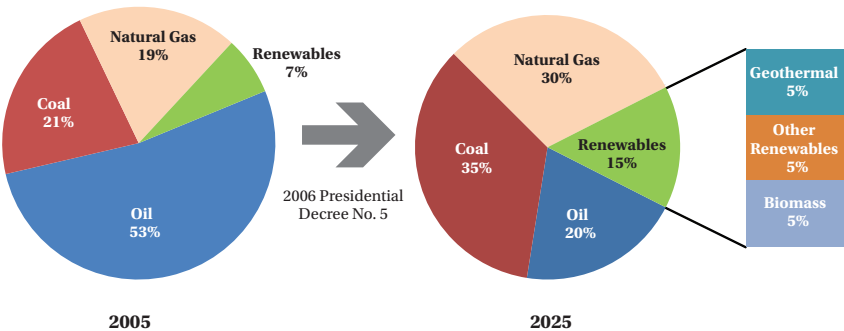
Existing Renewable Energy Market

Today, renewable energy accounts for a small but growing portion of Indonesia’s electricity portfolio. Most renewable energy comes from the hydropower and geothermal industries, but growth in other sectors is likely. Presidential Decree No. 5 mandates an increase in renewable energy production from 7 percent to 15 percent of generating capacity by 2025. To accomplish that goal, 6.7 GW of new renewable energy capacity must be installed in the next 15 years based on current growth projections.⁷ Geothermal and biomass have been slated for the most growth, but opportunities exist in every renewable energy technology (see Figure 1).

Surprisingly, Indonesia continues to import fossil fuels to cover production deficiencies instead of fully utilizing its already installed renewable energy capacity (see Figure 2). Expanding the production of existing resources (that is, already operating geothermal plants or hydropower dams) could displace some fossil fuel imports, by lowering the cost of energy subsidies and creating additional demand for renewable energy technology and expertise.

Since 2008, the government has offered tax incentives for foreign investment, including investors in renewable energy. Incentives include a 30 percent net income tax reduction for six years, free repatriation of investments and profits, and dispute settlement.⁸ Geothermal companies are afforded additional incentives. The 2003 Geothermal Law established long-term licenses for land use (more than 30 years) and a regulated price for geothermal energy. However, PLN’s status as the sole legal provider of electricity through Indonesia’s

Figure 1. Current Energy Mix versus Future Energy Goals



Source: PLN presentation to the United States Energy Association.

power grid complicates the incentive for foreign developers and often limits the profitability of projects.

In addition, Indonesia’s National Energy Policy of 2006 amended several policies and regulations to support renewable energy deployment. The law codified the targets for renewable energy production by 2025 set by Presidential Decree No. 5 and strengthened the position of cooperatives, private companies, and community organizations in PPA negotiations.

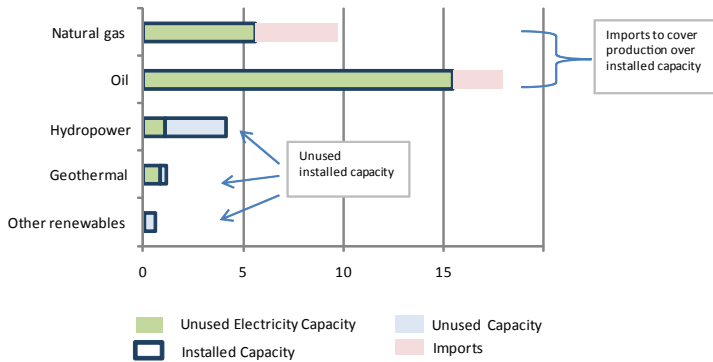
Geothermal Power Market

Indonesia is home to 40 percent of the world’s known geothermal resource (an estimated 27,510 MW), which is more than any other country. However, only 1,052 MW (a little more than 3 percent) has been developed to date.⁹ The government has mandated that geothermal energy provide at least 9,500 MW (5 percent) of the nation’s electricity by 2025.¹⁰ Phase II of the Crash Program will provide most of the growth, with an estimated investment opportunity of \$10 billion according to the Indonesian Investment Coordinating Board.¹¹

Already several U.S. companies have invested in the Indonesian geothermal sector—a trend that will likely intensify as the policy incentives for geothermal energy continue to improve. U.S. gov-

Figure 2. Energy Production versus Capacity, 2008

Indonesia's Installed Electricity Capacity vs. Electricity Production, by Source (29.5 GW)



Source: Energy Information Administration, Organization for Economic Cooperation and Development, PLN presentation to the United States Energy Association.

ernment support for technical capacity-building, resource assessments, and trade promotion are helping spur this development. U.S. government agencies will continue to work with the government of Indonesia to maintain a competitive investment climate for the U.S. geothermal industry.

Biomass Power Market

Indonesia’s potential for biomass power is likewise substantial but is currently undeveloped. Although 49,810 MW of production is possible, only 443 MW have been commercially developed. By 2025, the country has targeted 810 MW of biomass power, an increase of 83 percent, but that amount is still far less than the potential contribution.¹² Rice residues, sugar, rubber, and palm oil all provide biomass electricity, but the most promising commercial application for biomass is likely cogeneration in agribusinesses. Large-scale biomass projects would likely require new infrastructure to gather and deliver what is now considered a waste item.

Because of its extensive biomass resources, Indonesia is also considered a potential center for biofuel production, particularly biodiesel manufactured from palm oil. Palm oil, however, is rarely used in local biofuel development. The international price for palm oil and the higher value placed on food has meant that most palm oil is exported or used in food production. Ad-

ditional restrictions to development include a lack of incentives and subsidies for fossil fuels; incomplete data on land ownership; and a lack of biofuel processing ability.

As a result, biofuel development in Indonesia remains sluggish compared to that of other countries in the region. Nevertheless, several companies have begun using fast-growing crops, such as cassava, jatropha, or sweet sorghum, for biofuel production. The Ministry of Agriculture is preparing additional land for growing these high-yield feedstocks to meet the country’s biofuel production goals of 5.57 million kiloliters of biodiesel and 3.77 million kiloliters of bioethanol. The introduction of these crops will likely accelerate the production of biofuels and could become a key investment opportunity for U.S. companies.

Hydropower Market

As an island nation, Indonesia is well suited for hydropower from conventional hydro and emerging ocean energy technologies. PLN estimates that Indonesia has 75,670 MW of large hydropower potential. But unlike other countries in the region, Indonesia has not built a large hydropower facility and it currently only produces 4,264 MW of hydropower-based electricity.¹³

Estimates indicate that another 500 MW of mini- or micro-hydropower is also available for development. A 2007 grant from the United Nations Development Program allowed Indonesia to create an Integrated Microhydro Development Program to accelerate hydropower development. The program focused on removing investment barriers and fostering technical capacity, but it has only developed 17 percent of the nation’s mini-hydropower potential, leaving future growth in the sector likely.¹⁴

With thousands of miles of coastline, the potential for ocean energy is significant at an estimated 10–35 MW per kilometer of coastline. Currently, only one demonstration project has been developed—an ocean current system in the Lombok Strait. But future growth in the industry is also likely as technologies become further commercialized.

Wind Power Market

Indonesia's potential for wind energy is limited because of the lack of wind along the equator. The country's windiest regions tend to be the less populated, eastern islands, which lack a transmission infrastructure capable of sustaining large wind farms. Wind power opportunities are thus limited to small or medium-sized projects requiring lower wind speeds.¹⁵

To date, only a few small-scale wind farms have been attempted, and they account for only 1.1 MW of installed capacity.¹⁶ Offshore wind is more likely to provide investment opportunities for U.S. companies due to Indonesia's lengthy coastlines and consistent ocean breezes.

Solar Power Market

Indonesia offers significant solar power resources (4.8 kilowatt-hours per square meter per day [kWh/m²/day]), but the country has yet to develop a strong market. To date, Indonesia has installed 12.1 MW of solar power, which is mostly from roof-mounted solar photovoltaic (PV) cells in urban areas.¹⁷

Additional solar power development is hampered by the lack of household buy-in and a dearth of maintenance personnel trained at installing solar cells. However, there is little incentive for a service infrastructure to develop, and the market's growth appears limited. Without interconnection standards that allow consumers to sell excess electricity back to PLN, it is unlikely that the Indonesian solar power market will ever rival the markets in other countries in the region.

The GOI has however shown a desire to attract foreign solar cell manufacturers to Indonesia like the Philippines and Malaysia have done. This would not only help create jobs for local Indonesians, but also drive an interest in solar power writ large that could eventually lead to export opportunities for U.S. companies.

Distributed Generation

Despite the government's efforts to promote large power plants, recognition is growing that

smaller distributed generation can best electrify the country. One-fifth of Indonesia's population lives outside of the main population centers. Many residents therefore lack access to grid-connected electricity and depend on outdated and costly diesel generators. In fact, 35 percent of Indonesia's population lacks access to any electricity.

Small-scale renewable energy resources can help meet the rural electrification goals of President Susilo Bambang Yudhoyono and can be implemented without access to the nation's inefficient electricity grid. Small renewable energy projects can also create jobs for rural Indonesians, who often turn to deforestation as a means of survival.

Drivers of Renewable Energy Development

The government has begun promoting renewable energy to meet the country's robust economic growth targets. By reducing the country's dependence on imports and by increasing production of renewable energy, the government believes it can catalyze economic growth. Such a policy would deflect money back into the economy and make future growth more sustainable. Several other factors have also led to the country's new interest in renewable energy.

Energy Security

As a net importer of oil and gas, Indonesia is particularly vulnerable to the vagaries of world energy markets. Without a substantial increase in stable, domestically produced renewable energy, Indonesia will need to import additional fossil fuels. Renewable energy, however, can reduce dependence on foreign fuel sources and promote stable energy markets.

Rural Development

Rural development is a priority for the government, which has set a bold electrification target of 90 percent by 2020, which is significantly above the country's current electrification rate of 65 percent. Meeting the challenge will require an average of 1.3 million new electricity connections each year.¹⁸ According to the Ministry for the Development of Disadvantaged Regions, more than 10,000 Indone-

Table 1. Renewable Energy Potential in Indonesia

<i>Energy source</i>	<i>Installed capacity</i>	<i>Resource potential</i>	<i>Undeveloped potential (%)</i>
Hydropower	4,264.0 MW	75,670 MW	94
Geothermal	1,052.0 MW	27,510 MW	96
Mini-hydropower	86.1 MW	500 MW	83
Biomass	445.0 MW	49,810 MW	99
Solar	12.1 MW	4.8 kWh/m ² /day	—
Wind	1.1 MW	9,190 MW	99
Ocean	0.0 MW	35 MW	100

Source: PLN presentation to the United States Energy Association.

sian villages lack access to electricity; thousands more are forced to use expensive diesel generators.¹⁹ Since 2005, the government has encouraged renewable energy as a solution to rural electrification problems and has urged local communities to forgo diesel generation. The *2005–2025 National Energy Policy Blueprint* specifically states that renewable energy technologies should be used to meet the country’s rural electrification goals.

Climate Change

Indonesia is the third-largest emitter of greenhouse gases, mostly because of deforestation. The government is aware of the problem, and it understands Indonesia’s unique vulnerability to climate change as an island nation whose capital city, Jakarta, sits below sea level. Indonesia has thus taken a stronger position toward carbon dioxide emissions than have most developing nations. At the October 2009 meeting of the Group of 20, Yudhoyono announced that Indonesia was crafting a policy that would unilaterally reduce its emissions by 26 percent by 2020 and would reduce its emissions by 41 percent with international support. To meet the goal, Indonesia will heavily invest in renewable energy and recommit to stopping deforestation.²⁰

Sustainability

Indonesia faces significant environmental challenges: deforestation, water and air pollution, and forest fires. The government views renewable energy as part of a suite of potential technologies that could help with those challenges.

Barriers to Renewable Energy Development

Although Indonesia’s renewable energy resources are substantial and the government now seems committed to increasing the deployment of renewable energy, several barriers must be overcome for the country to reach its full potential.

Most important, Indonesia must address its pricing regime for renewable energy. The lack of financial incentives, combined with heavy subsidies for energy consumption, has forestalled the development of a cleaner energy infrastructure. Without incentives to promote renewable energy, most companies will invest in different markets with more favorable policy environments.

A more immediate problem is the country’s “Negative Investment List,” which restricts foreign investment in power plants producing less than 10 MW. Indonesia is currently revising its 2007 Investment Law, but no final announcement has been made. If Indonesia does not allow participation by foreign companies—which often have the technical know-how and capital needed to develop renewable energy projects—it is unlikely the country will meet its targets for economic growth and renewable energy deployment.

Indonesia also suffers from a lack of available financing. Although several well-capitalized private-sector banks exist, few are willing to lend money to technologies that are new or emerging. A sovereign debt guarantee could incentivize lending, promoting deployment and investment.

The lack of an after-sales service infrastructure also makes renewable energy projects difficult to implement. Local populations are often unwilling to accept a project that could stall or break down for lengthy periods, especially when the project requires spare parts that are difficult to find or technicians who are often unavailable. Moreover, the lack of a strong transmission infrastructure makes grid-connected renewable energy projects difficult to implement if they are located far from end users.

The government itself is sometimes a barrier to renewable energy deployment. It often struggles to implement policy initiatives, which causes bottlenecks for innovative technologies like renewable energy. To avoid the problem, local governments have been given the authority to administer tenders for projects, but they often lack the capacity to do so transparently. Several companies have complained that tenders are worded poorly and amended after the tender is announced. The U.S. Government is working with local Indonesian officials to promote better tendering practices.

If better data existed, the lack of tendering capacity would be less of a concern, but Indonesia suffers from a chronic lack of quality data, particularly in the geothermal industry. The state's planning agency is investigating ways to verify data through third-party valuation, but it has yet to make any public commitments. A standard PPA would solve many challenges and would allow concessions to be developed without negotiating with PLN.

Investment Climate

Revenue generation in Indonesia is described in Box 2. Funding for renewable energy projects is available from a variety of sources, including the United States, the Indonesian government, or multilateral institutions aimed at either development or environmental projects.

The United States Export-Import Bank can provide funding to Indonesian buyers looking to purchase U.S. technology, and it is seeking to increase lending through a new credit facility. The Overseas Private Investment Corporation can provide project finance in addition to equity investments and political risk insurance. In addition, the U.S. Agency for International Development and the U.S. Trade and Development Agency can help with development-related projects and technical capacity building.

The government of Indonesia offers funding through a sovereign wealth fund designed to increase foreign investment in renewable energy. The fund is managed by the Ministry of Finance and is a self-sustaining investment vehicle. The

World Bank, International Monetary Fund, Asian Development Bank, Clean Development Mechanism, and other multilateral funds can also offer funding and financing.²¹

Past Commercial Engagement

Commercial engagement with Indonesia on renewable energy has been an important aspect of bilateral negotiations between the U.S. and Indonesian governments. The Energy Policy Dialogue organized by the U.S. Department of Energy has been ongoing since 2005. The new Comprehensive Partnership between the United States and Indonesia will be formalized in 2010; a tenet of the partnership will be renewable energy cooperation.

In May 2010, Secretary of Commerce Gary Locke led a clean energy trade mission to Indonesia, promoting increased clean energy cooperation and the importance of addressing market access issues. In addition, the U.S. Department of Commerce led a similar clean energy policy mission to Indonesia in July 2009 that involved seven U.S. government agencies for two days of bilateral meetings and a daylong policy summit. The U.S. Trade Development Agency and the U.S. Department of State also hosted an ASEAN Clean Energy Trade and Investment Forum in Manila in April 2010, focusing on many of the same issues in a regional context.

Box 2. Revenue Generation in Indonesia

As in all foreign markets, U.S. firms must understand how revenue is generated, how the banking system operates, and how profits are repatriated back to the United States.

Currently, the government of Indonesia operates a free foreign currency exchange with a well-developed banking sector that consists of more than 10,000 local branches operated by either state-owned or private-sector banks.

Local Currency: Rupiah

Exchange Rate: Rp 9,094 to US\$1 (as of May 11, 2010)

Corporate Income Tax Rate: 28 percent (with some reductions for locally traded firms).

Source: Hong Kong and Shanghai Banking Corporation Premier, "Investing in Indonesia," 2009, www.hsbc.co.id/1/2/hsbc-premier_en_US/worldwide-assistance/investing-in-indonesia.

End Notes

1. The *2005–2025 National Energy Blueprint* (implemented in 2006) sets specific targets for renewable energy production. In addition to setting a national goal of meeting 15 percent of the country's electricity needs with renewable energy by 2025, the document sets targets of 9,500 megawatts (MW) from geothermal, 500 MW of grid-connected small hydropower, 330 MW of off-grid mini-hydropower, 80 MW of solar, 810 MW of biomass, and 255 MW of wind.
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4. Discussions at the U.S.–Indonesia Clean Energy Policy Forum, July 28, 2009, at the Shangri-La Hotel in Jakarta, Indonesia.
5. Discussion with the Ministry of Energy, July 29, 2009, during a clean energy policy mission to Indonesia by the U.S. Department of Commerce.
6. Indonesia Investment Coordinating Board, press release, "Investment in Energy Projected to Increase 56%," Jakarta, October 16, 2009.
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16. Ibid.
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20. "Nations: Environmentalists Welcome Indonesia's G-20 Carbon Pledge," *E&E News*, September 30, 2009.
21. Ibid.

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