

INDONESIA ENERGY SUBSIDY NEWS BRIEFING

A bi-monthly review of developments in Indonesian energy subsidy policy and energy markets

March 2017

As part of its work on energy policy and sustainable development in Indonesia, the Global Subsidies Initiative (GSI) of the International Institute for Sustainable Development (IISD) publishes a regular briefing on issues related to energy subsidies. For more information, contact Lucky Lontoh at lucky.lontoh@iisd.org and Phil Gass at pgass@iisd.org.

State Budget 2017: Prelude to 2017 Indonesian subsidy reform

In accordance to Indonesia's State Budget 2017, President Joko Widodo's administration greeted the new fiscal year¹ with policies related to the country's energy subsidies. The budget allocates lower overall subsidies for fuel and electricity, reflecting the government's plans to reduce Indonesia's energy subsidies.

Table 1. Indonesia State Budget figures and energy subsidies

Indicators	2014 (Audited)	2015 (Audited)	2016 (Revised)	2017 (Proposal)
MACROECONOMIC INDICATORS				
Inflation (%)	8.36	3.35	4.00	4.00
Growth (%)	5.06	4.79	5.20	5.10
Exchange Rate (IDR/USD)	11,878.00	13,392.00	13,500.00	13,300.00
Central Bank's Interests Rate (%)	5.8	5.97	5.5	5.3
Crude Oil Production (thousand/bl)	794.00	777.59	820.00	815.00
Natural Gas Production (mboepd)	1,224.00	1,195.40	1,150.00	1,150.00
Indonesian Crude Oil Price (USD/bl)	97.00	49.20	40.00	45.00
GDP (Billion IDR)	10,094,928.90	11,540,800.00	12,406,809.80*	-
STATE BUDGET SUMMARY				
State Revenue (Billion IDR)	1,550,490.80	1,508,020.40	1,786,200.00	1,750,300.00
State Expenditure	1,876,872.00	2,038,500.00	2,082,900.00	2,080,465.90
State Budget Surplus/Deficit	-241,494.00	-530,479.60	-296,700.00	-330,165.90
Budget Deficit Ratio to GDP	2.40	2.58	2.35**	2.41
ENERGY SUBSIDY INDICATORS				
Total Fuel Subsidy (billion IDR) (Fuel Subsidy cover gasoline, diesel, kerosene, LPG, and LGV)	239,994.06	60,758.70	43,686.90	32,300.00
Gasoline (value) (billion IDR)	108,957.69	11,194.56	0	0
Diesel (value) billion IDR	74,860.54	20,484.35	11,603	NA
Kerosene (value) Billion IDR	7,200.49	3,207.52	2,304	NA
LPG (value) billion IDR	48,975.34	25,872.27	25,197	11,980.00
LGV (value)	NA	30,516.96	NA	NA
Total Electricity Subsidy (billion IDR)	101,816.32	58,332.38	50,668.20	45,000.00

* 2016 GDP number is acquired from Bank of Indonesia.

**Number from State Budget. Due to different sources used to fill the GDP 2016, this percentage does not correspond with the GDP number.

Note: Mboepd: Million barrel of oil equivalent per day; bl: barrel; LPG: liquid petroleum gasoline; LGV: Liquid gas for vehicles

Source: Government of Indonesia (2015, 2016a, 2016b, 2016c)

¹ Indonesian Fiscal Year is from January 1 to December 31 each year. The Indonesian State Budget for the following year is ratified by the Parliament at the end of October in the previous year.

Fuel Price Subsidy: A Hidden Subsidy

The reduction of fuel subsidies in 2017 is influenced by a government decision to cut diesel subsidies by half, from IDR 1,000 to IDR 500 per litre. The decision was actually taken at the end of June 2016 in the *Revised State Budget 2016* (Ministry of Energy and Mineral Resources, 2016), which resulted in the decreasing subsidy value from IDR 60,758 billion in 2015 to IDR 43,686 billion in 2016 (see Table 1).

Indonesia's State Budget continues not to include a subsidy for gasoline, which is, in fact, still in place in a different manner for gasoline distributed to outside the Java-Bali-Madura (Jamali) region in order to level the retail price across the nation. Previously, the government was bound to fulfill a certain volume of gasoline with a specific government-set retail price, which was distributed by PT Pertamina, the state-owned oil and gas company. The record from the Oil and Gas Downstream Regulatory Agency (BPH Migas) shows that in 2014 the consumption of subsidized gasoline outside the Jamali region was 12.64 million kilolitres, or 42 per cent of the nation's total subsidized gasoline consumption (BPH Migas, n.d.).

Because of disparities in distance and distribution infrastructures across the Indonesian archipelago, gasoline retail prices may be different between regions. Initially, when the gasoline subsidy's elimination was first announced by the government in early 2015, the government tried to level price disparities among regions by issuing a distribution subsidy, as appears in the State Budget 2015. In November 2016, through Minister Regulation No. 36/2016, a new term, "*allowing a higher margin fee*," was introduced. It is an incentive to the distributor outside the Java-Bali-Madura (Jamali) region whose natural retail price is higher than the market price applied in the Jamali region. According to the same regulation, the Mandate Recipient Commercial Unit (Badan Usaha Penerima Penugasan), which is PT Pertamina, is responsible for the margin fee. This explains the disappearance of records of this gasoline subsidy in the State Budgets in 2016 and 2017. This policy is referred to as One Fuel Price (BBM Satu Harga) in the national media. Indonesian gasoline retail prices are officially still governed by the Minister of Energy and Mineral Resources through a price-adjustment policy that is intended to introduce changes every three months. Since the policy was officially introduced, however, the government has not necessarily changed the price according to the fluctuations in the international price reference.

Electricity Subsidy: Major Reform in 2017

One of the direct outcomes of the State Budget 2017 talks that concluded at the end of October 2016 was the improvement of electricity subsidy targeting by matching the electricity subsidy recipients with Indonesia's Unified Database (UDB) on poor households. This policy was a response to an alarming increase in the existing electricity subsidy, which peaked in 2013–2014 following the surge in international oil prices (TNP2K, 2016).

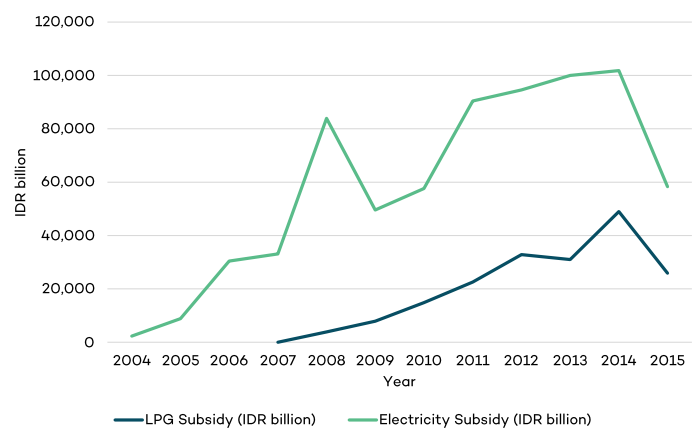


Figure 1. Electricity and liquid petroleum gas (LPG) subsidies in Indonesia

Source: Government of Indonesia (2005–2015, 2016a, 2016b, 2016c)

The agreement in State Budget 2017 is then translated into a gradual electricity tariff adjustment scheme and the exclusion of 18.9 million electricity costumers from subsidized tariffs, effective since January 1, 2017. According to the Ministry of Energy and Mineral Resources, PT Perusahaan Listrik Negara (PT PLN), the state-owned electricity company, had 46 million customers receiving a subsidized electricity tariff in the two lowest residential classes, 450VA (23.1 million customers) and 900VA (22.9 million customers) (Ministry of Energy and Mineral Resources, 2017; TNP2K, 2016). PT PLN had a total of 61.17 million costumers in 2015, 56.6 million of which are in the residential class (PT PLN, 2016b). In 2017, Indonesia will focus on restructuring subsidies for the 900VA class, while maintaining the subsidy for 450VA class.

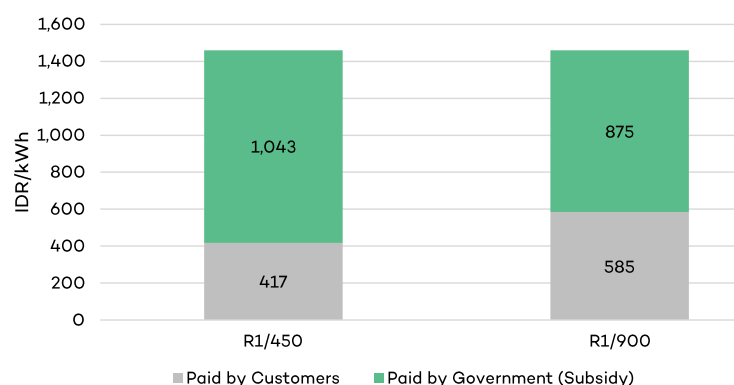


Figure 2. Structure of PT PLN subsidized tariffs

Source: PT PLN (2016a)

To identify the subsidy recipients, PT PLN worked with the National Team for Poverty Alleviation Acceleration (TNP2K), the agency responsible for managing Indonesia's UDB, to identify 25 million households (92 million individuals) living in the bottom 40 per cent of the socioeconomic stratum. Based on input from TNP2K, from January to March 2016, PT PLN launched a field survey to verify the identity of 4,152,714 households assumed to have 900VA connections in the UDB. The verification found that 2.9 million households have a 900VA connection and are eligible for the subsidy, while 534,030 households have a 450VA connection. There were 196,521 households that could not be verified, while the remaining households either have non-450VA or non-900VA connections or have no electricity connection at all (PT PLN, 2016a).

Subsequently, in accordance to Minister of Energy and Mineral Resources Regulation No. 28/2016, PT PLN split the 900VA customers into two groupings: the group with unchanged subsidized tariffs and a new group called Well-Off Household (900VA/RTM), which is expected to pay the unsubsidized tariff. In the months leading to the announcement of this policy, to encourage its well-off customers to voluntarily move from subsidized to unsubsidized classes, from March to December 2016 PT PLN was offering a free service if any 900VA customers wanted to upgrade their connections to unsubsidized 1,300VA class (Detik, 2016).

The target group for electricity tariff adjustment is the customers in the 900VA/RTM class (Tempo, 2017). These customers will have a different meter setup, which will follow tariff adjustments and will be applied three times in 2017: in January (a 35 per cent increase from the previous month), March (a 38 per cent increase from the previous month) and May (a 24 per cent increase from the previous month). After that, the tariff is expected to fluctuate following the market price (PT PLN, 2016a).

However, in the implementation, the electricity tariff adjustment had a minor modification, due to the declining Indonesian crude oil price, which slid from USD 46.64 per barrel in October 2016 to USD 43.25 per barrel in November (Detik, 2017). Indonesian crude price continued to fall to USD 39.9 per barrel in January 2017 (Katadata, 2017). As a result, PT PLN decided not to follow the trend and did not change the electricity tariff for February and March 2017 (see Table 2).

To tackle exclusion error, or customers who were eligible for the electricity subsidy but excluded from the recipient list, the government is organizing a complaint mechanism in which households can appeal to be registered as subsidy recipients. The complaint will be checked by TNP2K, which subsequently recommends the claimant to PT PLN if they fit the criteria as subsidy recipients. This complaint can be filed online at <http://subsidi.djk.esdm.go.id/>. Those that do not have Internet access need to go to a nearby village, district or regency office where government officers can help them to file their complaint. Customers can also get more information and file complaints by telephone to +62 21 5224883 (LAPOR, 2017). The Ministry of Energy and Mineral Resources claimed that they received 249 online complaints between January 2 and February 3, 2017. Of those, 110 have passed the criteria and were recommended to PT PLN to receive the subsidy, and the other 139 cases are still being verified by TNP2K (TNP2K, 2017).

Table 2. Progress of electricity reform in Indonesia until March 2017

Tariff Classes	Dec-16	Jan-17	Feb-Mar 2017
	Usage Tariff (IDR/KWh) and KVArh (IDR/KVA)		
R-1/TR	1,472.72	1,467.28	1,467.28
R-1/TR	1,472.72	1,467.28	1,467.28
R-2/TR	1,472.72	1,467.28	1,467.28
R-3/TR	1,472.72	1,467.28	1,467.28
B-2/TR	1,472.72	1,467.28	1,467.28
B-3/TM Blok WBP	1,041.81	1,035.78	1,035.78
B-3/TM Blok LWBP	1,041.81	1,035.78	1,035.78
B-3/TM KVArh	1,121.23	1,114.74	1,114.74
I-3/TM Blok WBP	1,041.81	1,035.78	1,035.78
I-3/TM Blok LWBP	1,041.81	1,035.78	1,035.78
I-3/TM KVArh	1,121.23	1,114.74	1,114.74
I-4/TT Blok WBP and LWBP	1,003.66	996.74	996.74
I-4/TT KVArh	1,003.66	996.74	996.74
P-1/TR	1,472.72	1,467.28	1,467.28
P-2/TM Blok WBP	1,041.81	1,035.78	1,035.78
P-2/TM Blok LWBP	1,041.81	1,035.78	1,035.78
P-2/TM KVArh	1,121.23	1,114.74	1,114.74
P-3/TR	1,472.72	1,467.28	1,467.28
I/TR, TM TT	1,644.99	1,644.52	1,644.52

Note: Rows in grey colour are target classes of subsidy reform scheme.

R-n: Residential-[group]

B-n: Business-[group]

I-n: Industry-[group]

kWh: kilowatt hour

kVArh: kilovolt amperes reactive hours

LWBP = Non-peak load period

P-n: Public service-[group]

TM: Medium connection

TR: Low connection

TT: High connection

WBP = Peak load period

LPG Subsidy Reform: Integration of Energy Subsidy and Social Protection System

State Budget 2017 also agreed to a significant reduction in the government's LPG subsidies, from IDR 31.98 trillion to IDR 11.98 trillion in the ratified State Budget version (Haryanto, 2017). Two weeks after the State Budget 2017 ratification, on November 15, 2016, the Directorate General of Oil and Gas hosted a cross-ministerial meeting to translate the budget agreement into implementation policy. The policy should follow two guides. The first is from the Parliament to improve the targeting accuracy by using the UDB, similar to the decision taken for electricity subsidy reform. The second piece of guidance, from the president, is to utilize the banking system to provide social assistance, following models such as the social protection card system (Ministry of State Owned Enterprises, 2017).

The cross ministerial meeting was then followed up by technical meetings throughout December 2016, with the aim that the government would announce the LPG subsidy reform policy by January 1, 2017.

The LPG subsidy reform plan, which was initially introduced as a closed distribution system, aims to focus the LPG subsidy only on the poor, small businesses, small fishers and farmers (Antara, 2017). This plan will shrink the number of participants in Indonesia's broader energy reform program from the 57 million households that are targeted by Conversion from Kerosene to LPG Program to 26 million poor households (based on the UDB), 2.3 million small businesses and an undetermined amount of small fishers and farmers.

An inflationary impact analysis by the Bank of Indonesia indicates that the initial closed distribution system plan would add 0.75 per cent inflation nationally in 2017; specifically, it would result in 0.18 per cent inflation for the Java region and 0.02 per cent for the Bali and Nusa Tenggara region. If the government decides to complement the aforementioned policy with an LPG price increase of IDR 1,000 per kilogram nationally, the total inflationary impact from the combination of those two policies would be an additional 0.415 per cent on top of the annual inflation (Agung, 2016). Ultimately, the Bank of Indonesia

considered the inflationary effect from LPG subsidy policy, including its potential combination with other subsidy reform policy options, and felt it could still be safely contained by the country's economy.

On January 18, 2017, the Office of the Cabinet Secretariat issued a result from a limited meeting on the integration of subsidy and social assistance programs into a unified family welfare card system, which instructed that all relevant ministries should recalculate the plan (Cabinet Secretariat, 2017). This indicated that the LPG reform policy would experience a delay in its launching.

Although Indonesia's LPG subsidy reform plan received similar instruction to the one for electricity subsidy reform policy, there are several key issues that make the plan more difficult to design, including²:

1. The limited time to conduct a thorough analysis and test policy options.
2. The lack of administrative and physical infrastructure to enforce the implementation of a national-scale banking system or smart-card system.
3. Data deficiencies, especially on small business, small fishers and small farmers. Many of Indonesia's subsidized LPG customers are not registered.
4. Disproportionate spread between LPG distribution points and the location of targeted subsidy recipients.
5. The need to coordinate this policy with regional government leaders, and also policy, financial and legal synchronization from the central to the local level.
6. Modalities in merging subsidies and social assistance program.

The LPG subsidy reform policy is still expected to launch this year in accordance with the mandate from the State Budget 2017. However, there is no timetable for its launch to date, and the nearest possible date of implementation is March or April 2017 (Bisnis, 2017). Due to the nature of the high-level instructions upon which this reform plan is developed, currently Indonesia's LPG subsidy reform can also be perceived as the effort to merge the energy subsidy into the social protection system.

² Key issues above are summarized from an unpublished report by the Global Subsidies Initiative team, which worked with branches of Indonesia's government offices and recorded the process of designing Indonesia's LPG subsidy reform policy from December 2016 to January 2017.

Coal Sector

At the end of 2016, Indonesia's coal exports rebounded and reached a 13-month high, with the coal price creeping up since July 2016 (Platts, 2017; CNN Indonesia, 2016). Juda Agung, Director of Economic and Monetary Policy of Bank of Indonesia, saw the price rally as a benefit for Indonesia, but questioned the continuance of such momentum (Republika, 2017). Overall, Indonesia's coal production and exports have been slowing in the past three years due to low prices and the government's domestic market obligation policy, which forces coal supply into the national power plant project (Katadata, 2016b). Coal production and export also suffered from dwindling domestic value-adding obligation policy (Merdeka, 2014a) and the government's clamp-down on mining permit conditions since 2012, widely known as clean and clear certification (Merdeka, 2014b; CNN Indonesia, 2017).

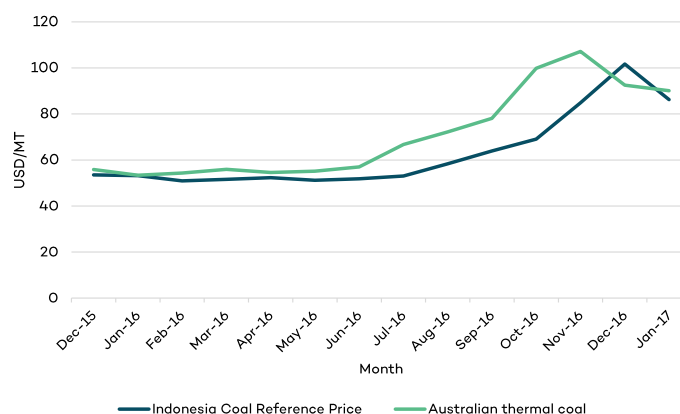


Figure 3. Indonesia's coal price

Source: Directorate General of Mineral and Coal of the Ministry of Energy and Mineral Resources (2016, 2017); Indexmundi (n.d.)

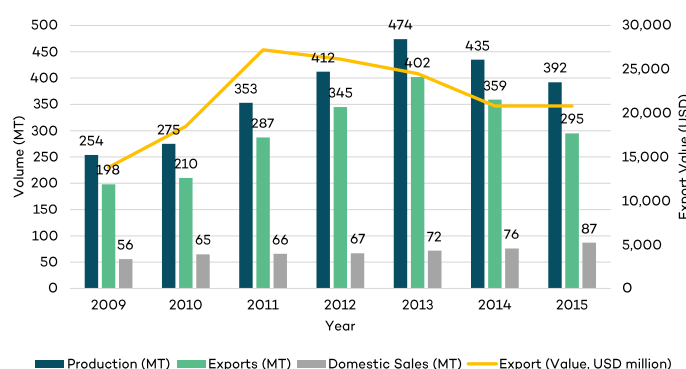


Figure 4. Indonesia's coal production, export, domestic sales and export value

Source: APBI-ICMA (n.d.); BPS (n.d.)

In September 2016, the Ministry of Energy and Mineral Resources revised Regulation No. 9/2016, which set a 15–25 per cent profit margin for coal supply to mine-mouth power plant projects, to establish a pure business-to-business price negotiation between the coal producer and PT PLN. From the business perspective, the revision is supposed to benefit PT PLN (Katadata, 2016a) during the higher coal price period, ensuring that it has adequate coal supply for domestic power plants.

In January 2017, a Global Subsidies Initiative delegation was hosted by the Coordinating Ministry of Economic Affairs to introduce a preliminary report on Indonesia's coal and renewable energy supports and subsidies. This included the development of a comprehensive inventory of these supports and subsidies for the first time in Indonesia. In addition, the Ministry of Economic Affairs and the governments of Sweden and Denmark supported the project. A revised report, reflecting the views of those in attendance at the January event, will be finalized and is intended for a formal launch in April 2017.

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