

PRESS RELEASE

IGS Luncurkan *White Paper 2025* : Memetakan Strategi “Gelombang Gas Berikutnya”

Jakarta, Rabu, 17 September 2025 — Indonesian Gas Society (IGS) hari ini menggelar agenda strategis di Ballroom, Pullman Hotel Thamrin – Jakarta: **Peluncuran IGS White Paper 2025: “Bridging the Next Gas Wave: What will it take to unlock Indonesia’s Gas Potential? 2nd Indonesian Gas Society White Paper”** agenda ini menyajikan peta jalan berbasis data untuk memperkuat ekosistem gas nasional—dari sisi pasokan, permintaan, infrastruktur, hingga kebijakan harga—agar selaras dengan target transisi energi rendah karbon.

“Gas akan tetap menjadi pilar penting yang berjalan berdampingan dengan energi terbarukan. Melalui forum dan White Paper 2025, IGS menekankan eksekusi: efisiensi hulu–hilir, penguatan jaringan pipa & LNG, kepastian regulasi dan harga domestik, serta akselerasi teknologi rendah karbon,” ujar **Daniel S. Purba**, Advisor IGS.

Temuan & Pesan Kunci White Paper 2025 (ringkas untuk media)

- **Permintaan naik konsisten; pusat gravitasi tetap di Jawa–Sumatra.** Rystad memproyeksikan konsumsi domestik naik dari **3.630 mmscfd (2025) menjadi 4.830 mmscfd (2035)**, ditopang sektor industri & listrik; setelah 2045 stabil di **~5.700 mmscfd**. Jawa–Sumatra tetap menyumbang **~70%** permintaan nasional.
- **Keseimbangan pasokan–permintaan ketat; proyek besar jadi penopang.** Penurunan alamiah lapangan akan diimbangi proyek **IDD, Abadi LNG, dan Andaman**, yang diperkirakan mengerek produksi dari **4.970 mmscfd (2027) > 7.500 mmscfd (2032)** dan menyumbang **>50%** output nasional hingga 2050.
- **Kapasitas regasifikasi berpotensi kurang mulai pertengahan 2030-an.** Kebutuhan LNG diproyeksikan melampaui kapasitas regasifikasi nasional **paling cepat 2035**; di Jawa Barat terminal bisa beroperasi mendekati 100% utilisasi, sementara **Teluk Lamong (Jatim)—yang dijadwalkan selesai 2025—**kemungkinan belum cukup menampung kenaikan permintaan.
- **Konteks kebijakan & harga:** Regulasi harga gas untuk sektor kelistrikan & industri **berlaku sejak 2020 dan akan berakhir akhir 2025**; tanpa kepastian lanjutan, pembeli berisiko terekspos harga LNG yang lebih tinggi. Pemerintah juga **mengalihkan 7 kargo LNG (April–Mei 2025)** ke pasar domestik untuk jaga ketahanan energi. Selain itu, **RUU (Juli 2024)** mendorong **DMO gas 60%** dari produksi hulu untuk pasar domestik.
- **Infrastruktur prioritas & konektivitas wilayah:** Proyek pipa **Dumai–Sei Mangkei (DUSEM)** dijadwalkan konstruksi **2025** dan target operasi **2027** guna menyalurkan gas Andaman ke Sumatra; namun koridor Belawan perlu diwaspadai potensi bottleneck.
- **Solusi taktis:** Optimalisasi rantai pasok melalui **agregasi komoditas**, integrasi

pipa– terminal regasifikasi–kapal LNG, serta mekanisme pasar bertahap; pengembangan **biomethane, CCS/CCUS & pengangkutan CO₂, hydrogen refueling, dan blue ammonia** mendukung dekarbonisasi.

Prioritas Regulasi Jangka Pendek (Top 3)

Sebagaimana direkomendasikan dalam model distribusi LNG, model pengadaan LNG, dan model akses infrastruktur pada White Paper, langkah regulatif berikut diperlukan untuk mengatasi tantangan jangka pendek dan menyelaraskan tujuan Pemerintah terkait kemandirian serta ketahanan energi:

1. **Percepatan pembangunan infrastruktur melalui skema PPP yang lebih kuat** — menciptakan term yang bankable untuk pipa, penyimpanan, terminal regasifikasi, dan infrastruktur **small-scale LNG (ssLNG)** untuk distribusi.
2. **Penyelarasan tujuan dan insentif pengadaan LNG** — mendorong kolaborasi/perencanaan yang lebih terpadu antar importir/pembeli LNG utama guna meningkatkan visibilitas volume, efisiensi kontrak, dan daya saing harga.
3. **Penyederhanaan perizinan dan proses pengembangan infrastruktur & distribusi** — menetapkan tenggat waktu yang jelas dan **single-window** licensing untuk memangkas waktu pengembangan tanpa mengurangi standar K3L.

Narasumber

- **Launching White Paper : Samuel Low** — Partner & Head of APAC Advisory, Rystad Energy
- **Interactive Discussion & Q&A :**
Achmad Widjaja — Wakil Ketua Umum Bidang Advokasi & Industri ALB, Kadin Indonesia
Host: **Daniel S. Purba**, Advisor IGS.

Rangkaian Acara (Detail Agenda)

- **16.15 – 16.30** Registrasi
- **16.30 – 16.45** Master of Ceremony, Safety Induction, **Indonesia Raya**
- **16.45 – 16.55 Opening Remarks** – *Aris Mulya Azof*, Chairman of IGS
- **16.55 – 17.15 White Paper Presentation** by Rystad Energy
- **17.15 – 17.50 Interactive Discussion & Q&A** – *Moderator: Daniel S. Purba;*
Guest Speaker: Achmad Widjaja
- **17.50 – 17.55 Official Handover** IGS White Paper (Rystad Energy → Chairman of IGS)
- **17.55 – 18.00 Appreciation Plaque** to Sponsors
- **18.00 – 20.00 Dinner & Networking**

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Tentang Indonesian Gas Society (IGS)

IGS adalah wadah kolaborasi para pemangku kepentingan sektor gas di Indonesia yang mendorong dialog berbasis data, berbagi pengetahuan, dan rekomendasi kebijakan guna memperkuat ketahanan energi nasional sekaligus mendukung target penurunan emisi melalui pemanfaatan gas yang efisien dan berkelanjutan.

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PRESS RELEASE

IGS Launches 2025 White Paper: Mapping the Strategy for the “Next Gas Wave”

Jakarta, Wednesday, 17 September 2025 — The Indonesian Gas Society (IGS) today hosted a strategic event at the Ballroom, Pullman Hotel Thamrin – Jakarta: the **launch of the IGS White Paper 2025, “Bridging the Next Gas Wave: What will it take to unlock Indonesia’s Gas Potential?”** (the 2nd Indonesian Gas Society White Paper). The paper presents a data-driven roadmap to strengthen Indonesia’s gas ecosystem—covering supply, demand, infrastructure, and pricing policy—aligned with the nation’s low-carbon transition goals.

“Gas will remain a critical pillar alongside renewables. Through the 2025 White Paper, IGS emphasizes execution: upstream–downstream efficiency, stronger pipeline and LNG networks, regulatory and domestic price certainty, and acceleration of low-carbon technologies,” said **Daniel S. Purba**, IGS Advisor.

Key Findings from the 2025 White Paper (media summary)

- **Steady demand growth; Java–Sumatra remains the center of gravity.** Rystad projects domestic consumption to rise from **3,630 mmscfd in 2025 to 4,830 mmscfd in 2035** (million standard cubic feet per day), driven by industry and power. After 2045, demand stabilizes at around **5,700 mmscfd**. Java–Sumatra is expected to account for **~70%** of national demand.
- **Tight supply–demand balance; major projects are the backbone.** Natural decline in mature fields will be offset by **IDD, Abadi LNG, and Andaman**, potentially lifting production from **4,970 mmscfd (2027)** to **>7,500 mmscfd (2032)** and contributing **>50%** of national output through 2050.
- **Regasification capacity may tighten from the mid-2030s.** LNG requirements could exceed national regas capacity as early as **2035**. West Java terminals may run near full utilization, while the **Teluk Lamong (East Java)** facility—targeted for **2025** completion— may not be sufficient to accommodate incremental demand on its own.
- **Policy & pricing context.** Gas price regulations for the power and industrial sectors, in place since **2020**, are due to **expire at end-2025**; without clarity, buyers risk exposure to higher LNG prices. The Government **diverted seven LNG cargos (Apr–May 2025)** to the domestic market to safeguard energy security. A **July 2024 bill** also proposes **60% gas DMO** (domestic market obligation) from upstream production.
- **Priority infrastructure & regional connectivity.** The **Dumai–Sei Mangkei (DUSEM) pipeline** is slated to start construction in **2025** and target operation in **2027** to channel Andaman gas to Sumatra; potential bottlenecks in the Belawan corridor require close monitoring.
- **Tactical solutions.** Optimize the supply chain through **commodity aggregation**,

integration of **pipelines–regas terminals–LNG carriers**, and phased market mechanisms; advance **biomethane, CCS/CCUS and CO₂ transport, hydrogen refueling, and blue ammonia** to support decarbonization.

Near-Term Regulatory Priorities (Top 3)

As outlined in the White Paper's recommendations on LNG distribution models, LNG procurement models, and infrastructure access models, the following near-term regulations would help address immediate challenges and align with the Government's objectives for energy self-sufficiency and resilience:

1. **Accelerate infrastructure development via robust Public–Private Partnership (PPP) frameworks** : enabling bankable terms for pipelines, storage, regas terminals, and **small-scale LNG (ssLNG)** distribution infrastructure.
2. **Align LNG procurement objectives and incentives** : foster coordinated planning and aggregation among key LNG importers/buyers to improve volume visibility, contracting efficiency, and price competitiveness.
3. **Streamline permitting and licensing for infrastructure and distribution** : introduce clear timelines and a simplified, single-window process to reduce project lead times while maintaining HSE standards.

Speakers

- **White Paper Launch: Samuel Low** — Partner & Head of APAC Advisory, **Rystad Energy**
- **Interactive Discussion & Q&A: Achmad Widjaja** — Vice Chair for Advocacy & Downstream Industries, **Kadin Indonesia**
- **Host: Daniel S. Purba**, IGS Advisor

Agenda (local time, WIB)

- **16:15 – 16:30** Registration
- **16:30 – 16:45** Master of Ceremony, Safety Induction, Indonesian National Anthem
- **16:45 – 16:55** Opening Remarks — **Aris Mulya Azof**, Chairman of IGS
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About the Indonesian Gas Society (IGS)

The **Indonesian Gas Society (IGS)** is a collaboration platform for stakeholders across Indonesia's gas sector, fostering data-driven dialogue, knowledge sharing, and policy recommendations to strengthen national energy security while supporting emissions-reduction targets through efficient and sustainable gas utilization.

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