



PLN

Turbocharging the business development process in PLN

16 Januari 2024

PLTS Pulau Messa, Nusa Tenggara Timur

www.pln.co.id

Topic

- 1. PLN in Glance**
2. PLN's Roadmap for Energy Transition in Indonesia
3. PLN's Partners for Renewables Energy in Indonesia

PLN is the Largest Utility Company in Southeast Asia and 100% owned by the Government of Indonesia



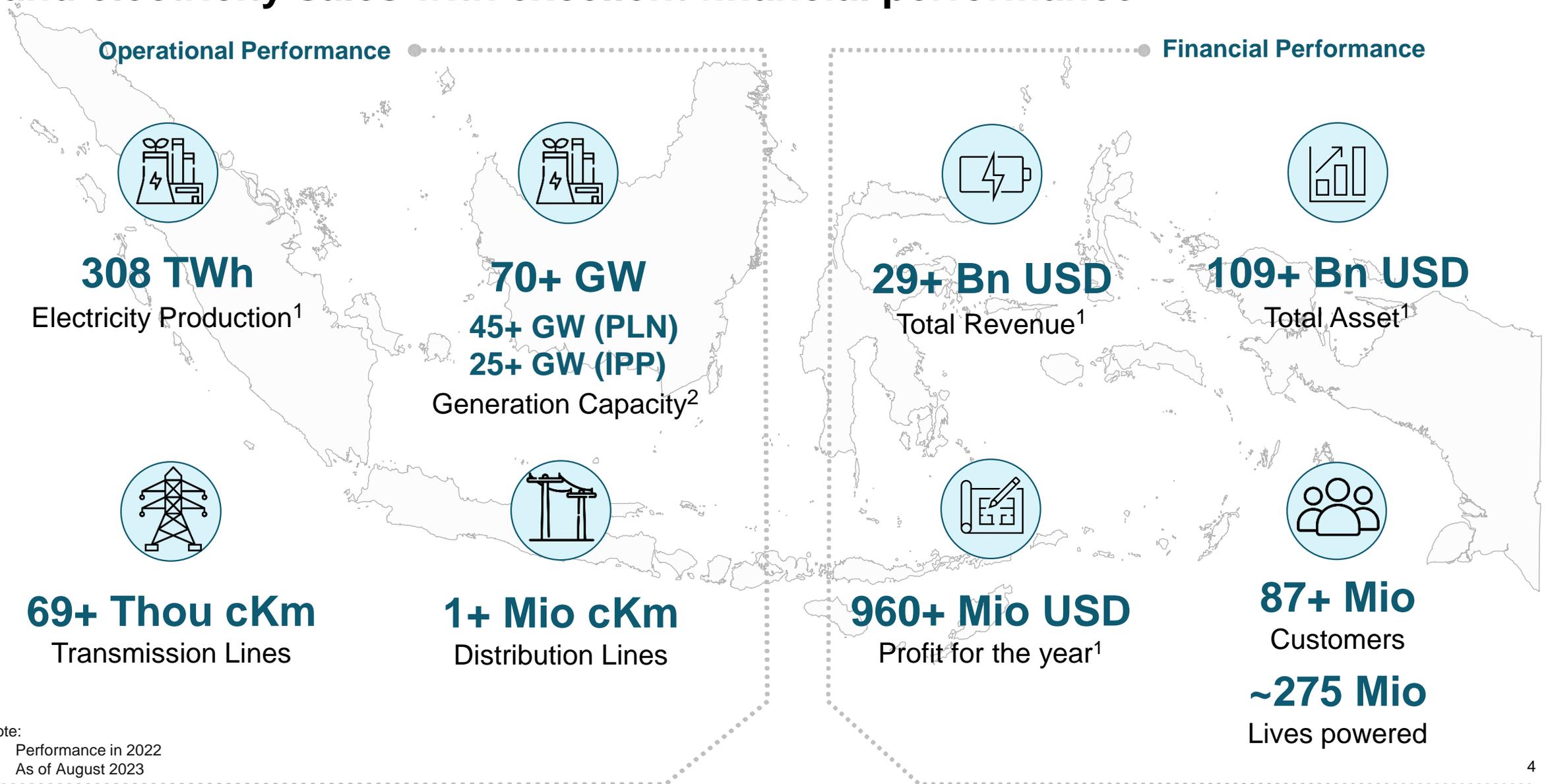
**The largest utility company in Indonesia,
100% owned by the Government of Indonesia**

**PLN is the largest utility company
in Southeast Asia**

PLN is Indonesia's state-owned electric utility company, which PLN provides electricity infrastructure in Indonesia, its starting from power generation, transmission, distribution, construction, retail, and other services related to electricity sales of electricity.

PLN Group is the largest Generation Company in Southeast Asia, longest transmission and distribution line.

For 78 years, PLN has been powering millions of lives in Indonesia. We have track record for growth in both infrastructure development and electricity sales with excellent financial performance



Note:

1. Performance in 2022

2. As of August 2023

PLN's GenCo subholdings have **11GW+ of RE** in pipeline



#1 largest GenCo in Southeast Asia by capacity



total RE power plant projects in the pipeline across 120+ projects



#2 largest GenCo in Southeast Asia by capacity



total RE power plant projects in the pipeline across 100+ projects

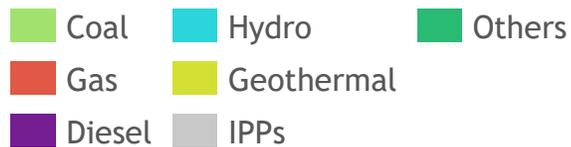
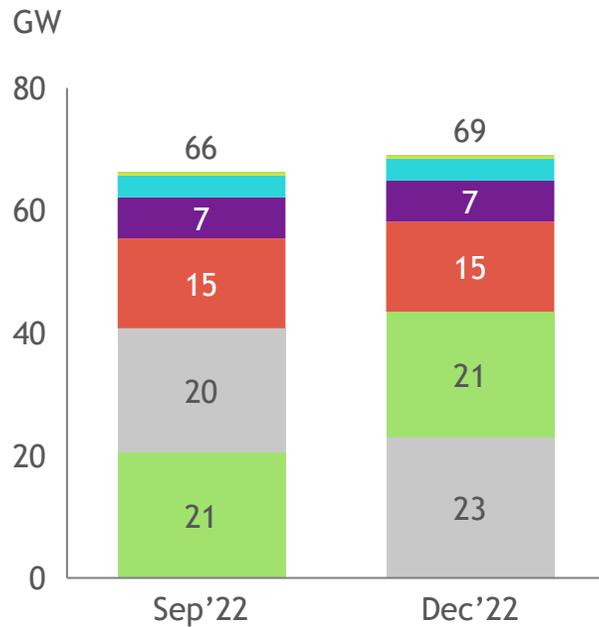
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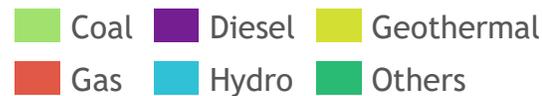
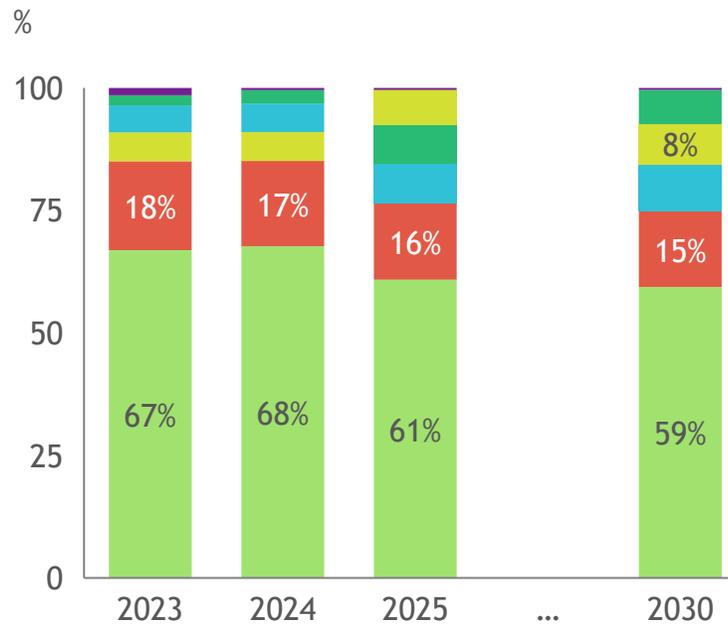
PLN : Indonesia's national utility and largest utility in Southeast Asia



70 GW generation capacity



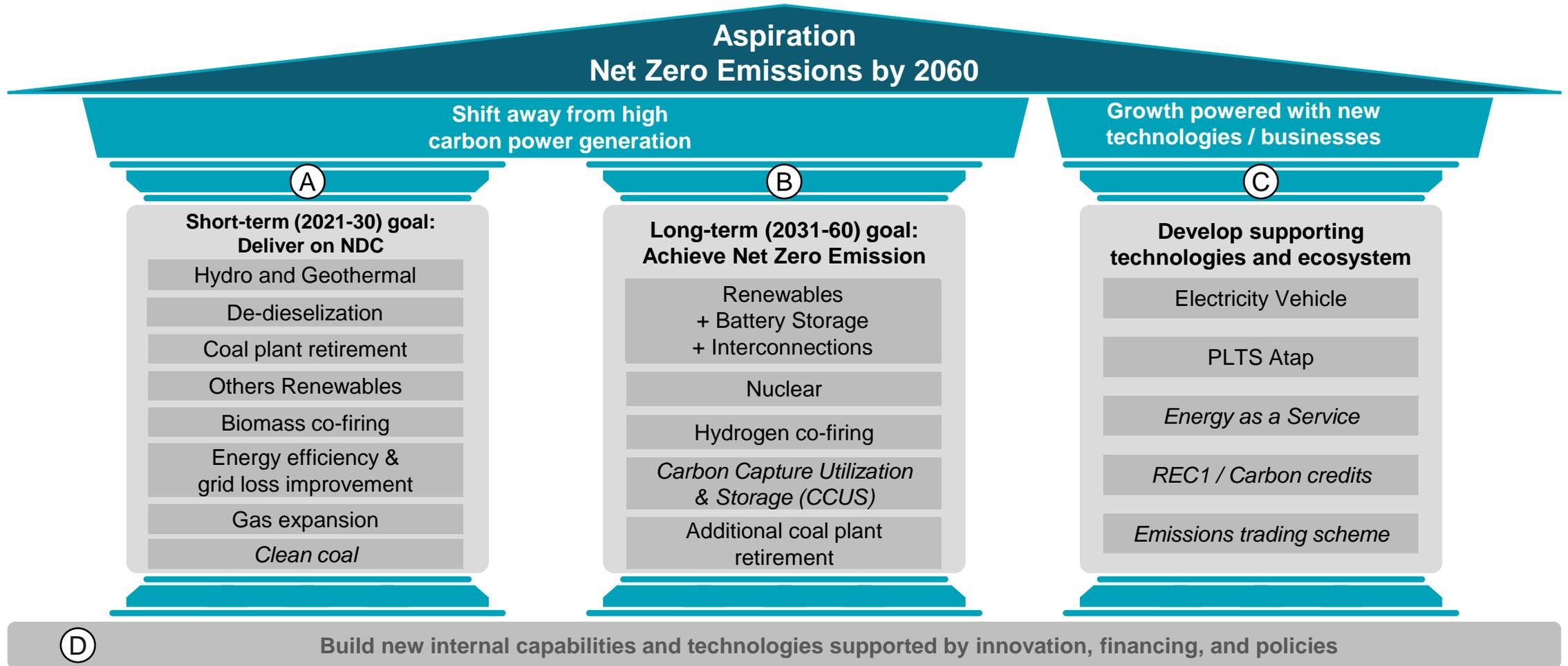
Planned coal phase-down



2060 net zero commitment



PLN's energy transition strategy and initiatives to achieve Net Zero Emission by 2060



The Business as Usual (BAU) scenario, which relies heavily on gas and coal, offers low CAPEX and rapid construction. PLN will pursue the Accelerated Renewable Energy scenario, with a 75% share of New and Renewable Energy Sources and 25% from gas, with coal phase down.

Business As Usual (BAU)



CCGPP/CFPP
(Baseloader & Load follower)

Wind & Solar (VRE)
5 GW



NRE Baseload
17 GW



High Emission



Low CAPEX
(Backloaded)



High OPEX

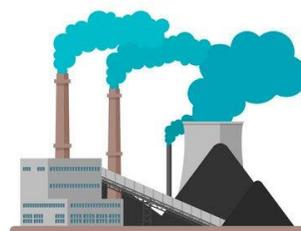


Low Energy Security



Accelerated Renewable Energy

with Coal Phase Down



CFPP Phase Down
+ 25% CCGPP

75%NRE
Wind & Solar (VRE)
28 GW



NRE Baseload
34 GW



Low Emission



High CAPEX
Partially Frontloaded



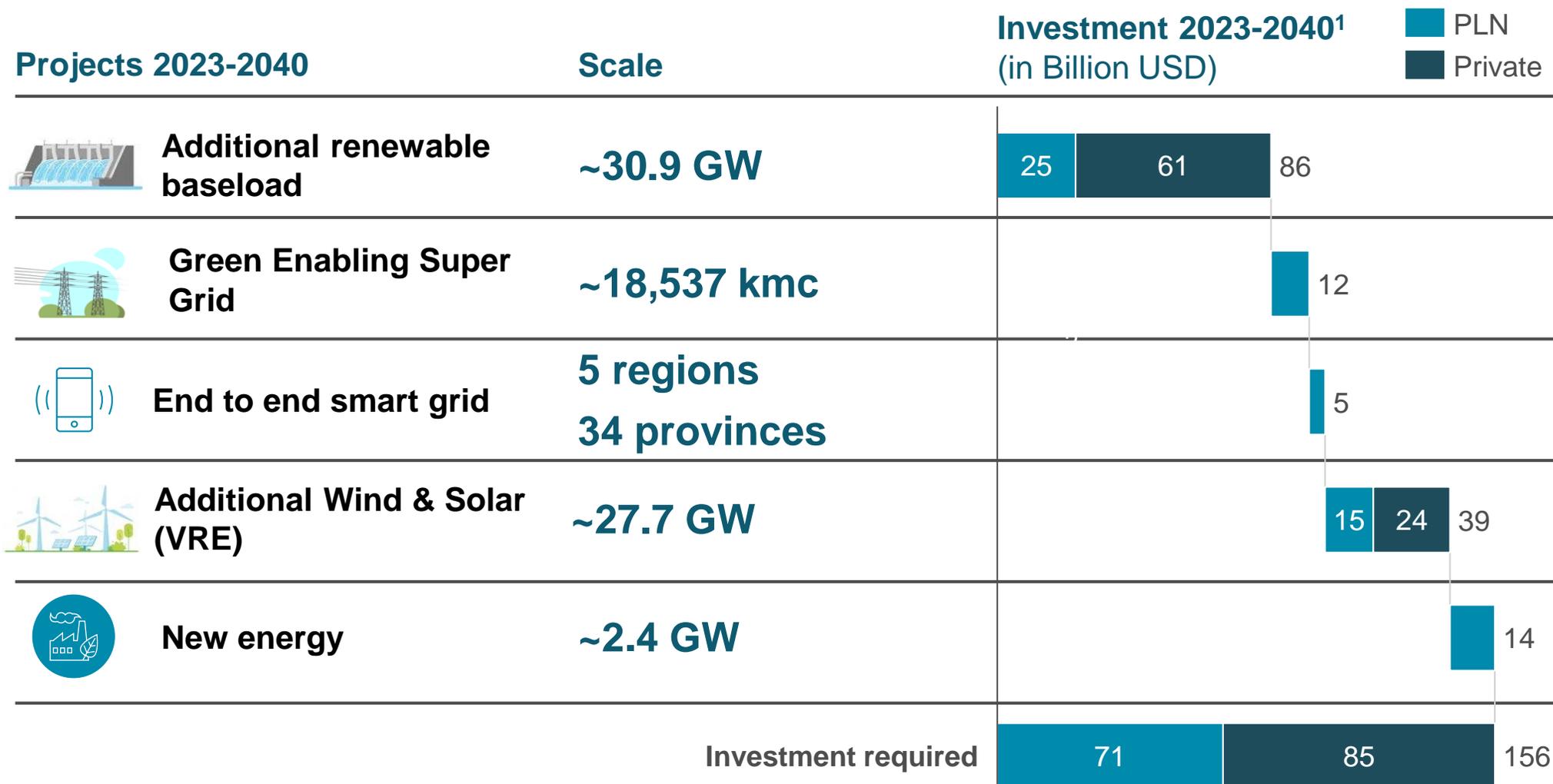
Low OPEX



High Energy Security



Through **Accelerated Renewable Energy with Coal Phase Down scenario**, **PLN is scaling up New Renewable Energy (NRE)**. Battery Energy Storage System (BESS) will take huge Part as enabler in the development of Smart Grid and VRE.



¹Excluding the USD 37 billion investment for fossil power generation, IDC, and maintenance capital expenditure

Topic

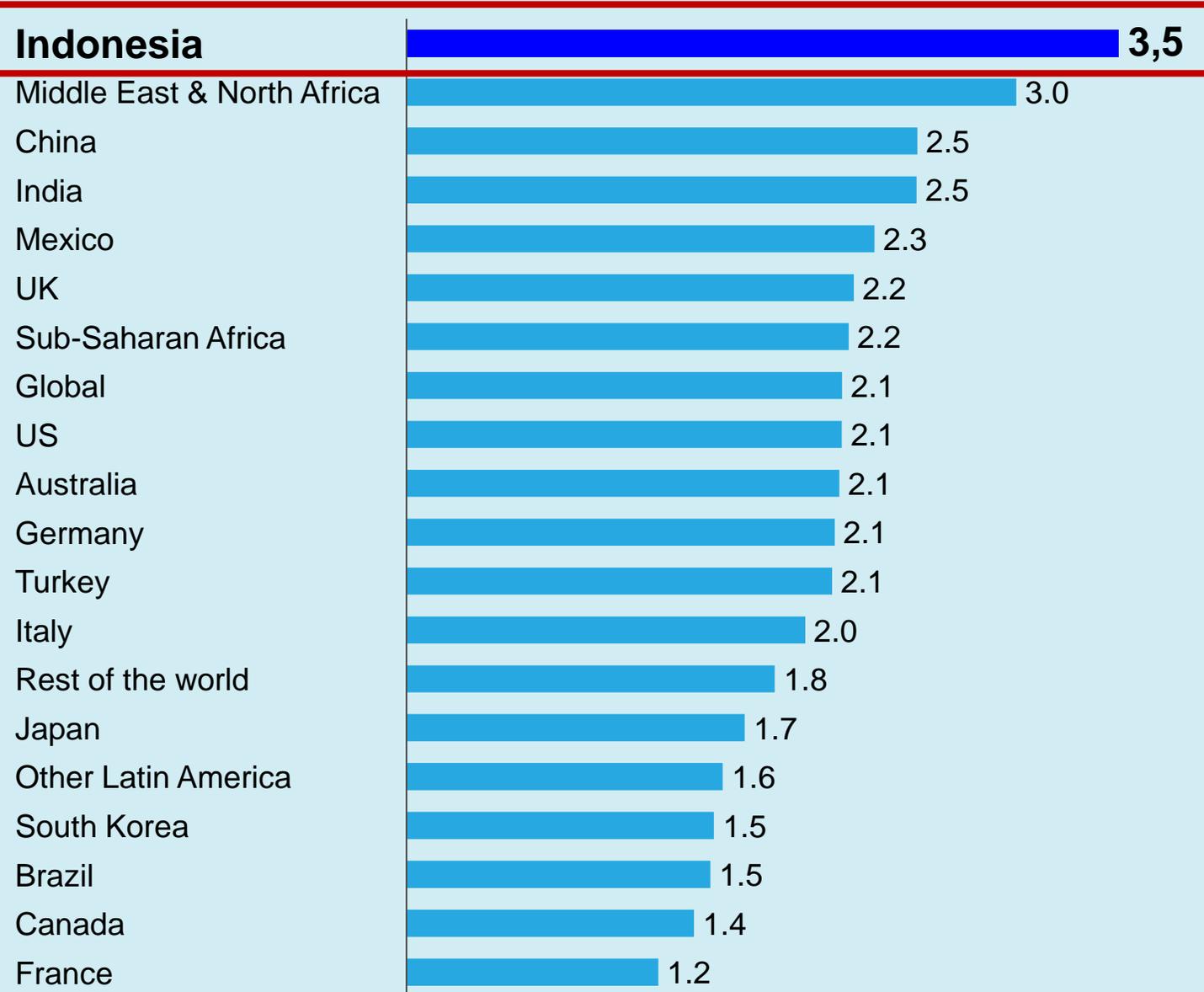
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Indonesia leads Energy Transition. through *Accelerated Renewable Energy Development* scenario which additional RE is **75%**, Indonesia will be the **most aggressive country** in the world, in terms of energy transition.

At 2030, Capacity of RE Power plant will increase **3,5 times** than 2022. This indicator is the highest **in the world.**¹

Additional RE power plant capacity in 2030 compared to 2022¹, (in times)



1. Sumber: BloombergNEF - 2023 (economic transition scenario), <https://www.bnef.com/insights/32247>)

PLN has achieved significant milestones for its green businesses this year...



Cirata floating PV 145 MWac, the 3rd largest in the world



Electricity infrastructure development at IKN
(Government mandate)



Hydropower plant construction in Mamberamo DAS



The first green hydrogen production plant in Indonesia
(operated by PLN NP)

... and various initiatives including PV manufacturing are in progress



Ground-mounted PV with a capacity of 100 MWp



Solar PV manufacturing with capacity of up to 1 GW/year



Partnership with ACWA Power and Sembcorp for *Green H₂/Ammonia*



Collaboration and incubation programs for start-ups

PLN has collaborated with various world-class company (Top 500 Global Fortune and Top Tier Company worldwide)



#3 State Grid
China Corp
(USD 460 Miliar)



#27 Total Energy
(USD 184 Miliar)



#35 BP
(USD 164 Miliar)



#41 Mitsubishi
(USD 154 Miliar)



#85 China Energy
Investment
(USD 107 Miliar)



#92 Hyundai
Motor
(USD 103 Miliar)



#95 Electricité de
France
(USD 100 Miliar)



#96 Huawei Investment
& Holding
(USD 99 Miliar)



#100 Power China
(USD 96 Miliar)



#157 Marubeni
(USD 76 Miliar)



#165 General
Electric
(USD 74 Miliar)



#193 Panasonic
Holdings
(USD 66 Miliar)



#249 KEPCO
(USD 52 Miliar)



#269 China Energy
Engineering Group
(USD 50 Miliar)



#279 Sumitomo
(USD 49 Miliar)



#411 China
Datang
(USD 35 Miliar)



#423 Siemens
Energy
(USD 34 Miliar)



#433 SAP
(USD 33 Miliar)

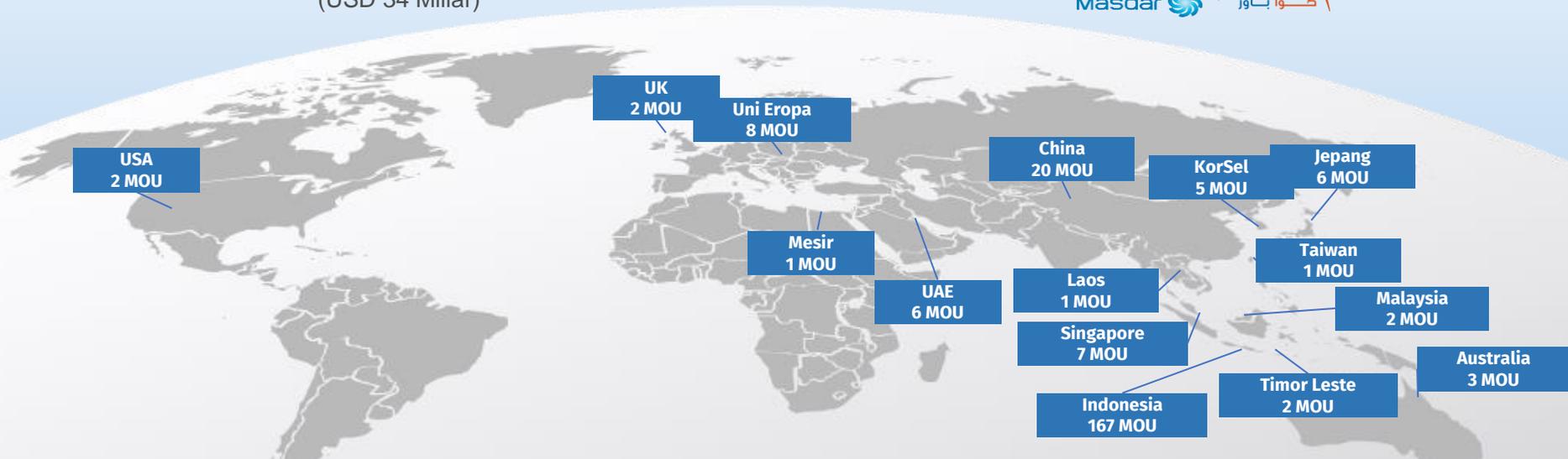


#497 ABB
(USD 29 Miliar)



more will follow..

Note:
Data tahun 2022
() : Revenue



PLN has initiated collaboration with Companies from China



Shandong Electric Power
Engineering Consulting
Institute Corp., Ltd



BEIJING



China Electric Power
Equipment &
Technology



Southwest Electric Power
Design Institute co.,ltd



PLN Investment Days



Main Agenda



PLN Investment Days is a highly anticipated annual event among investors, as an opportunity to receive the latest information on PLN strategy and to engage among PLN's group. This event is a testament to the company's commitment in nurturing relations among investors and stakeholders alike, while also maintains the support from strategic partners, as it allows for better understanding through visitation and interactive dialogue.



Mulia Hotel
Nusa Dua, Bali



Tuesday – Wednesday
27-28 Feb 2024



Top Global Companies
National Government
Academia
Financial institutions

