



“Unlocking Isolated Reserves : Perspektif Hulu

UFO BUDIARIUS A
Vice President Commercialization
June 2025

AGENDA



Komitmen Pemerintah

Pemetaan Pasokan

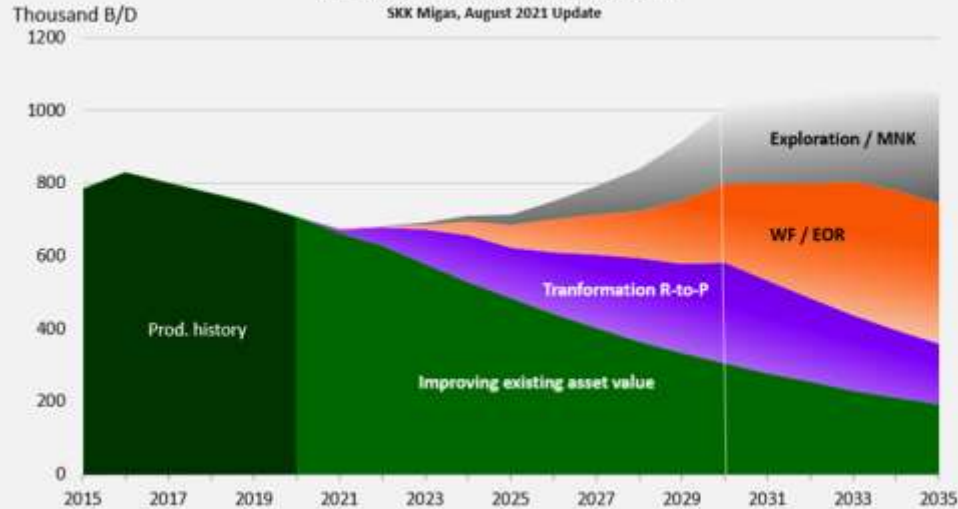
Profil Pembeli gas Indonesia

Infrastruktur gas dan peluang

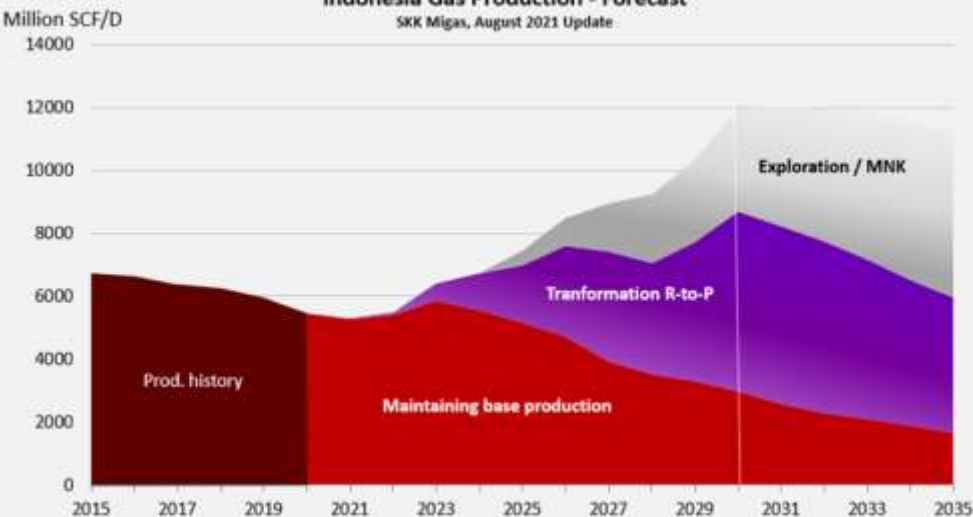
GOVERNMENT COMMITMENT TO SUPPORT LONG TERM PLAN OF 1 MILLION BOPD & 12 BCFD



Indonesia Oil Production - Forecast
SKK Migas, August 2021 Update



Indonesia Gas Production - Forecast
SKK Migas, August 2021 Update



5 Main Strategy to reach 2030 Long Term Plan:

- 1) Optimizing production from existing field;
- 2) Contingent Resources to Production Transformation;
- 3) Acceleration of Enhanced Oil Recovery (EOR);
- 4) Enhancement of O&G Exploration; and
- 5) Acceleration of improved regulation through One Door Service Policy (ODSP) and Incentive

Fiscal Terms Improvement:

- 1) Improvement of Tax Facility;
- 2) DMO price up to **100% of ICP** for *PSC Cost Recovery*;
- 3) *Branch Profit Tax (BPT)* waiver or relief

GAS AS COMMODITY HAS AN IMPORTANT ROLE FOR INDONESIA

PRESENTED AT:



1. Security of Supply
2. Support Domestic Demand
3. Energy Transition
4. Source of State Revenue

Allocation
purposes



Source of Energy
(Electricity, Fuel for
Transportation and
household)



Source of Materials
(Fertilizers,
Petrochemicals, LPG etc)



Export Commodities

Berita Industri Hulu Migas Indonesia

PRESENTED AT:



upstream

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Opinion

Supermajors return as gas fuels Indonesia's upstream renaissance

Southeast Asian country's prospectivity woos supermajors back to its shores



Years after downsizing their presence in the Southeast Asian nation, some of the world's supermajors are returning to Indonesia, this time with a firm focus on its gas. (Photo: RYTIS DAKANTAS/UPSTREAM)

Published 23 May 2025, 15:58

Bloomberg Technoz

Pencarian



Market

Teknologi

Global

Nasional

Finansial

Gaya Hidup

Ent

HOME > ENERGI

Shell, Chevron, Total Lirik Hulu Migas RI Lagi: PR Masih Banyak

Redaksi

20 May 2025 11:00



Operator anjungan minyak: Pengoboran Pesisir memasang pemandu bit di lantai anjungan minyak Royal Dutch Shell Plo/Bloomberg-Matthew Butcher

PETRONAS and TotalEnergies Expand Longstanding Upstream Collaboration

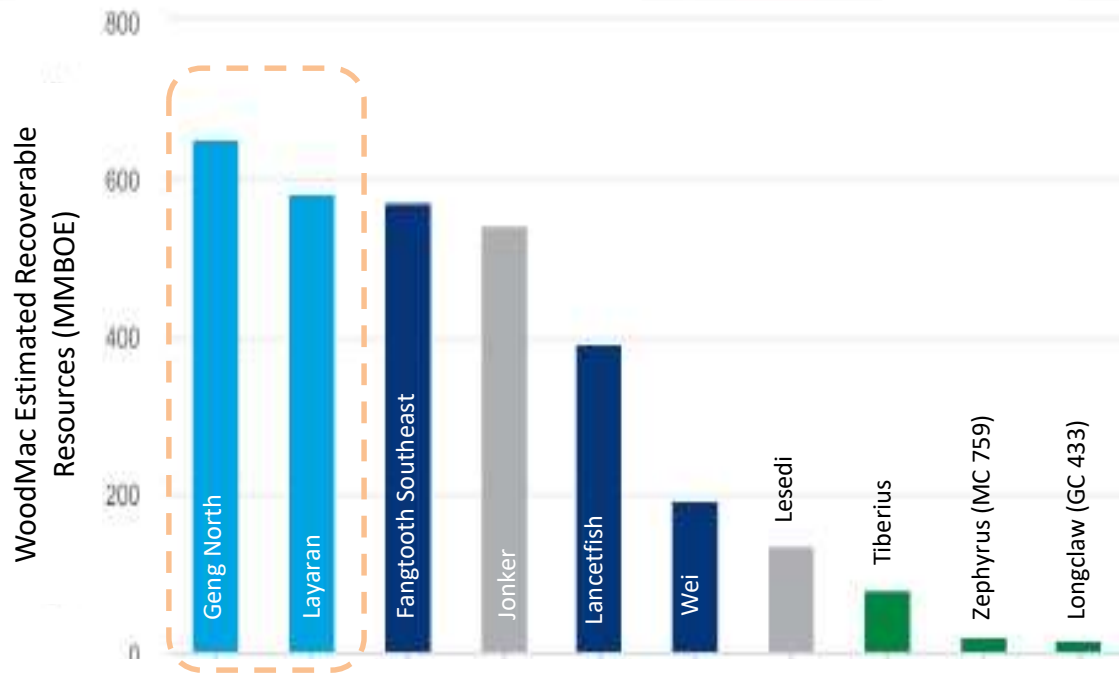
2025 Media Release - 16 Jun



Kuala Lumpur, 16 June 2025 – PETRONAS and TotalEnergies have signed a Strategic Cooperation Agreement (SCA) and two Farm Out Agreements (FOAs) to broaden their upstream collaboration in Malaysia, while making progress on their international partnership under the Bobara Production Sharing Contract (PSC) in Indonesia.

Exploration is Gaining Momentum With Significant Discoveries

Global Deepwater Discoveries in 2023

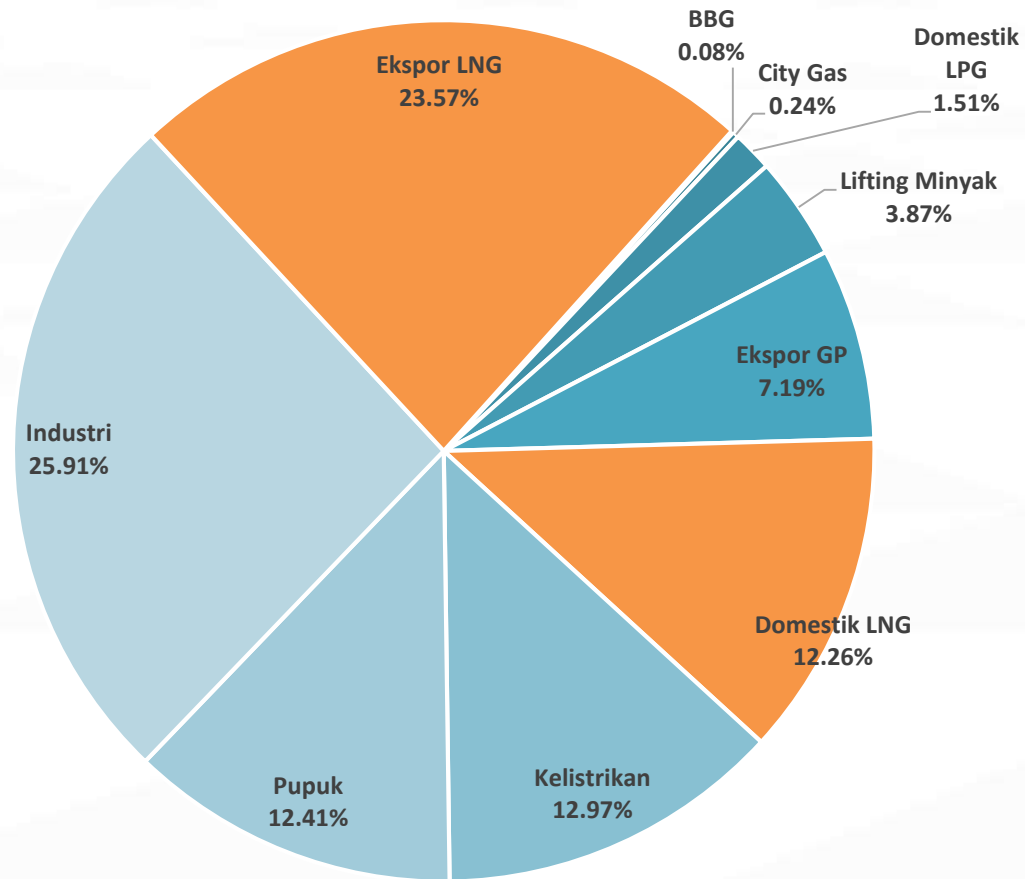


- Boosting 50% from exploration to development phase in 5 years
- **Most of Development plan in recent 5 years are Gas Field**

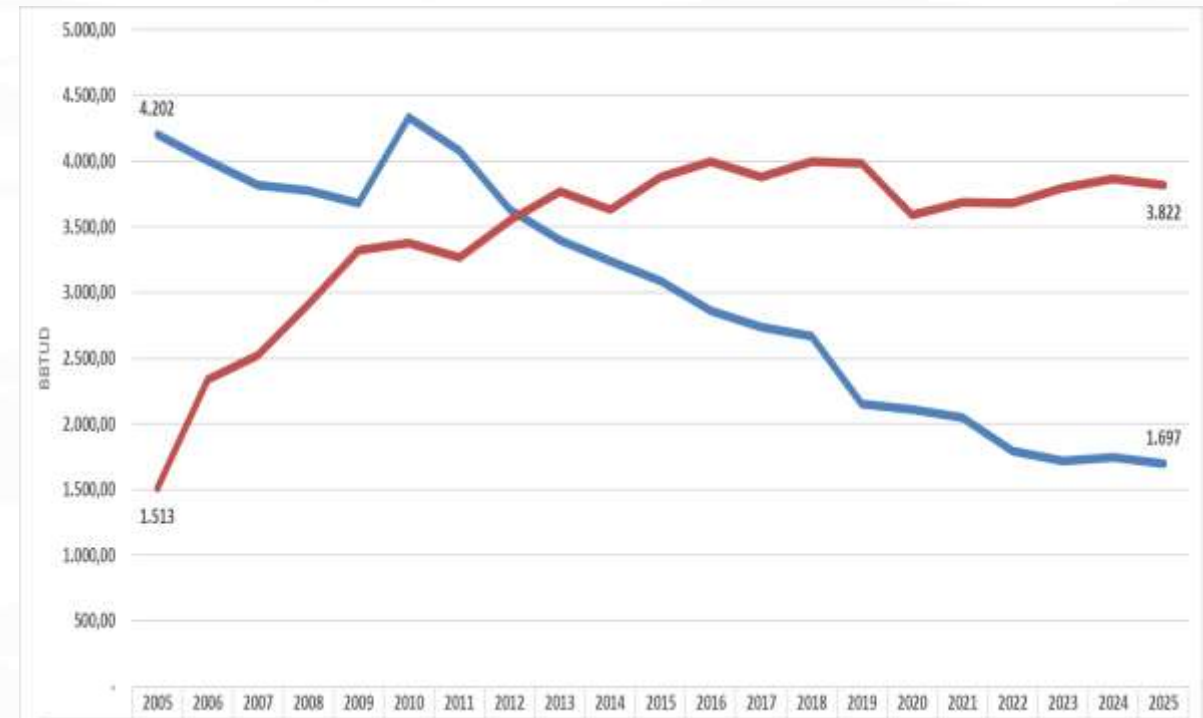
The **World's 5 greatest discoveries** of 2023 (Source: WoodMackenzie, Rystad Energy and S&P Global).

Gas Buyer Profile

Export VS Domestic

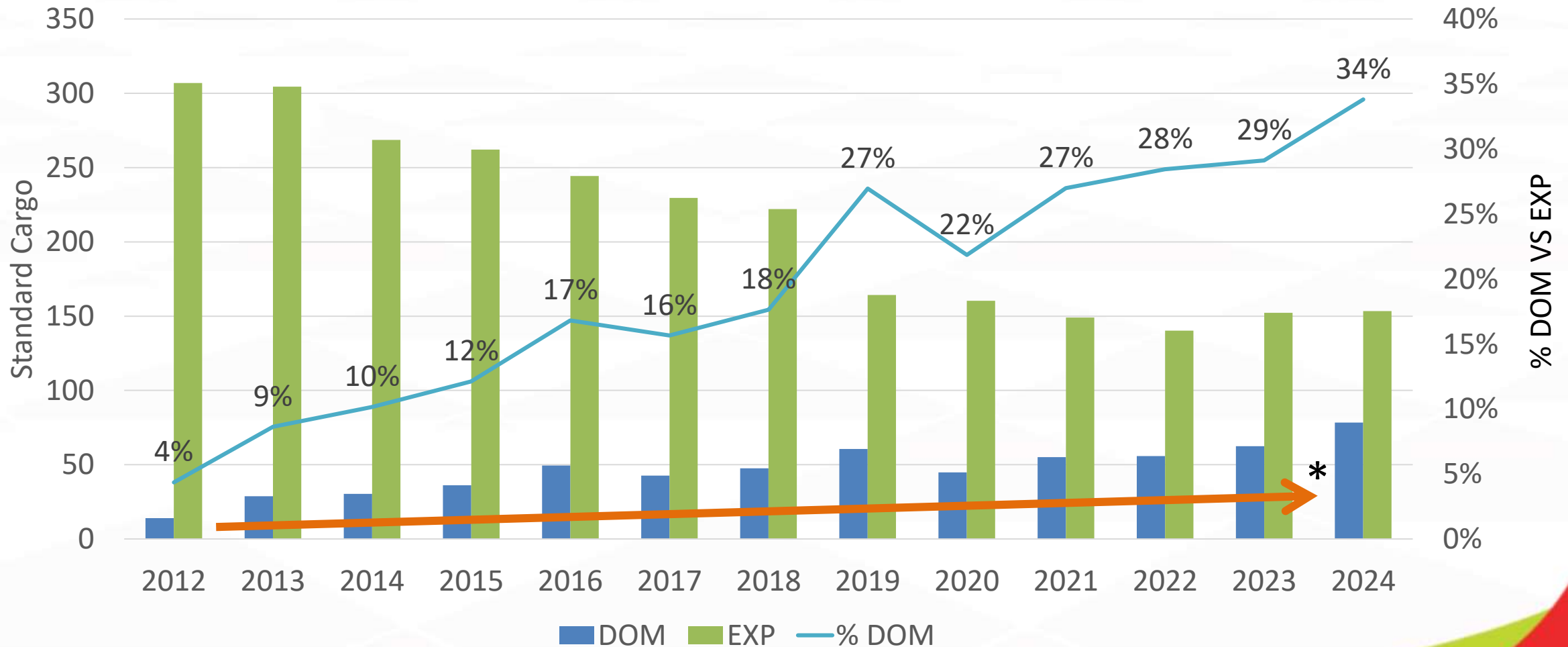


- BBG
- Ekspor GP
- Industri
- City Gas
- Domestik LNG
- Ekspor LNG
- Domestik LPG
- Kelistrikan
- Lifting Minyak
- Pupuk



TOTAL LIFTING GAS BUMI TAHUN 2025
S.D. APRIL: 5.519 BBTUD

LNG Domestic VS Export



*Peningkatan domestik demand sekitar 7% perthn



Indonesia's Upstream Strategic Project & Pipeline Gas Infrastructure

PRESENTED AT:



PERTAGAS
INTEGRATED
PIPELINE AND
ENERGY SUMMIT



South Andaman Block, KKKS Mubadala

- Layaran-1 drilled in 2023 has potential reserve 6 TCF of gas in place.
- Tangkulo-1 potential for up to 2,7 TCF of gas-in place.
- Total production 400-500 mmscfd on stream in 2028



Jambaran Tiung Biru

Est. Peak Prod. : 190 MMSCFD Net gas
Investment (Est) : US\$ 1,53 Billion
Onstream: 2022

IDD (Indonesia Deepwater Development) Gendalo & Gehem



Est. Peak Prod. : 844 MMSCFD dan 27.000 BOPD
Target on stream 2027, Investment (Est) : US\$ 6,98 Billion

Tangguh Train-3



Est. Peak Prod. : 700 MMSCFD dan 3.000 BCPD
Already Operating, Investment (Est) : US\$ 8,9 Billion

Est. Peak Prod. : 9,5 MTPA LNG (1600 MMSCFD); Gas Pipe line 150 MMSCFD;
35.000 BCPD

Target on stream 2029, Investment (Est) : US\$ 19,8 Billion

Tuna dan Mako KKKS Harbour dan Conrad

- Mako Estimated onstream 2027 Puncak Prod 111 MMSCFD (2030)
- Tuna Onstream 2029 Puncak Prod 114.7 MMSCFD (2030)



Dumai-
Seimangke
556 KM, 2027

Cirebon –
Semarang
245 KM, 2026



Abadi

Bontang



Tangguh

INPEX
Masela



Suplai LNG mulai

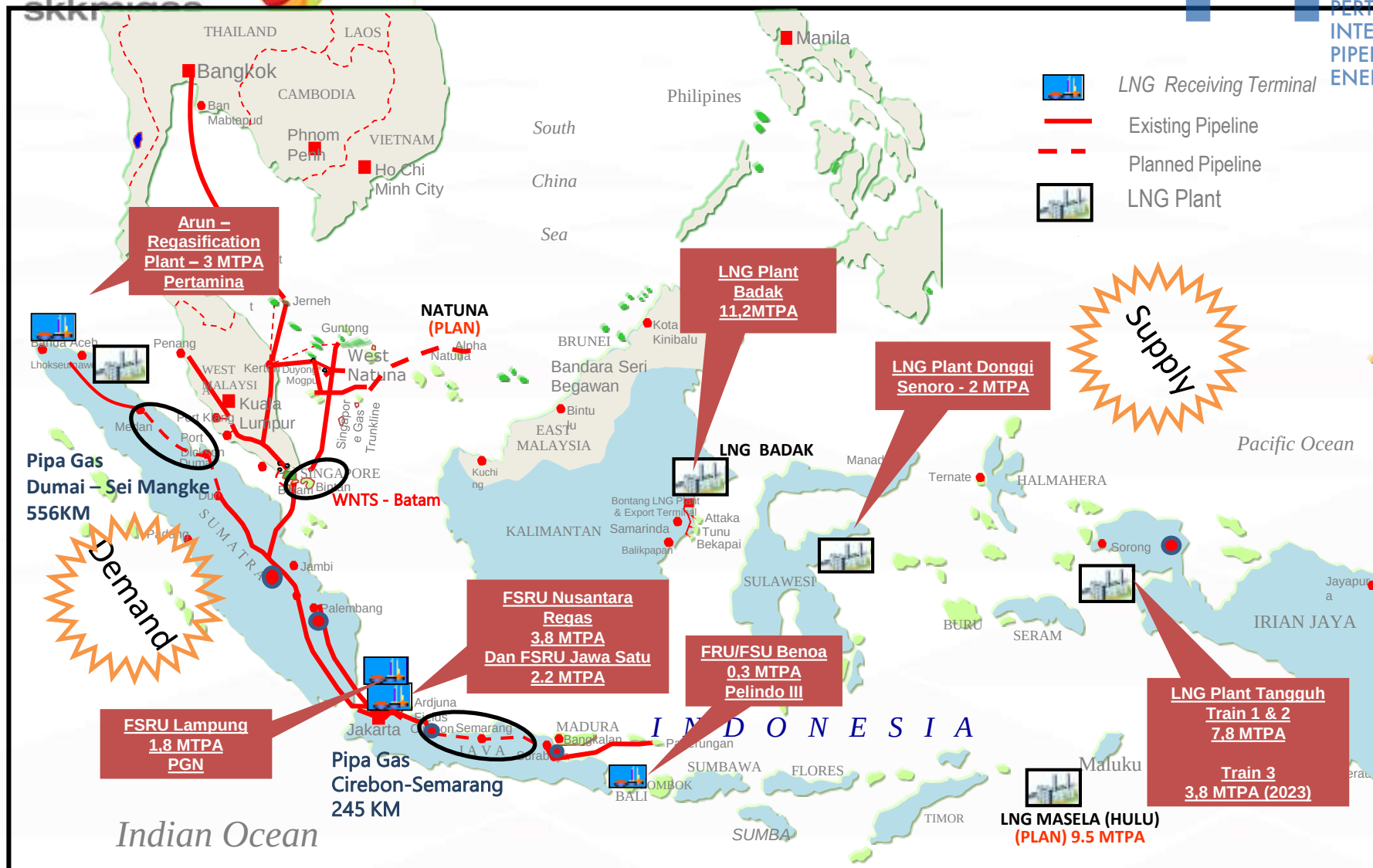
- 2028 IDD
- 2029 Masela



Existing LNG

Peta Suplai dan Permintaan serta ketersediaan infratraktur gas

PRESENTED AT:
PIPES 2025
PERTAMINA
INTEGRATED
PIPELINE AND
ENERGY SUMMIT



Peluang dan tantangan:

1. Diperlukan pembangunan infrastruktur pipa gas untuk memberikan **fleksibilitas dan efisiensi biaya pengiriman gas melalui pipa** dari sumber gas kepada pengguna maupun area industri dari ujung Sumatera hingga Jawa Timur. Pipa yang belum tersambung antara lain:
 - Dumai – SeiMangke 556 KM
 - Cirebon – Semarang 245 KM
 - *West Natuna Transportation System (WNTS)* ke Batam (Pulau Pemping)
2. Ketersediaan receiving terminal LNG di Sumatera dan Jawa
3. Potensi dari lapangan gas Mubadala WK Energy South Andaman dapat menggunakan pipa gas untuk mengalirkan gas ke pasar Sumatera bahkan wilayah Jawa.

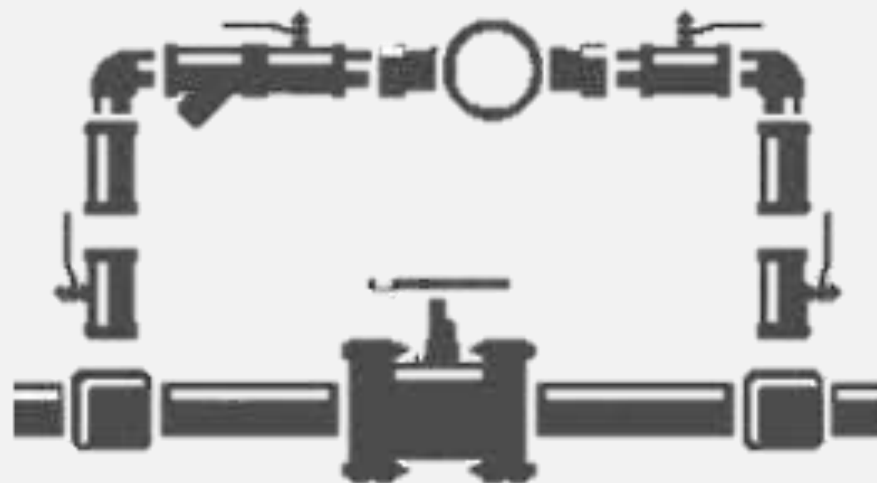
Pull Strategy

“Built” demand near Gas Supply

Petrochemical Industry,
especially in the Eastern Part
of Indonesia



New customers:
Glass Industries



Push Strategy

Develop infrastructure to
“bring” gas to the demand.



Gas transmission pipeline



Small and medium scale -
LNG Plant



Jaringan Gas Kota
(Jargas) infrastructure
to reduce LPG Import



New regasification LNG
terminal

COLLABORATION AND INTEGRATION IS THE KEY

Collaboration between Upstream, Midstream, Downstream, and all stakeholders will optimize the utilization of Indonesian natural gas in supporting the achievement of SKK Migas' Long Term Vision

Global: Geopolitik mempengaruhi harga Minyak Mentah dan LNG

Memberikan keseimbangan antara kebutuhan domestik serta optimasi penerimaan dari penjualan pasar ekspor

Pengaturan **Harga gas** Khusus Domestik

Kesempatan meningkatkan kehandalan melalui infrastruktur gas pipa (Medan – Dumai **Pipeline** and Cirebon - Semarang Pipeline) and **LNG Receiving Terminals**



PRESENTED AT:



THANK YOU