

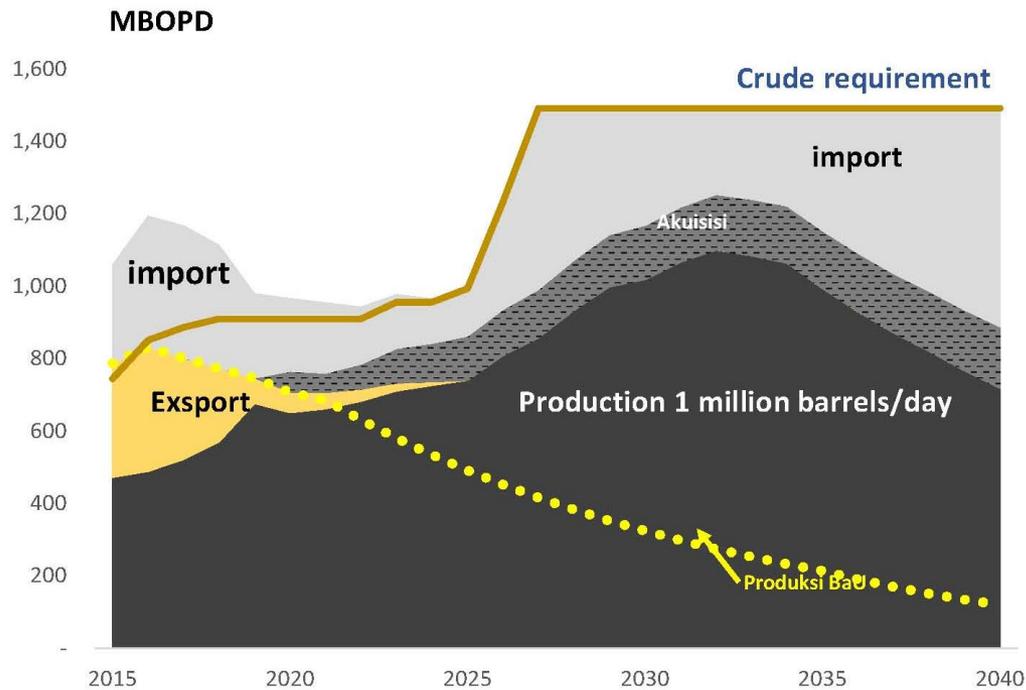
Indonesian Petroleum Association



**Rapat Dengar Pendapat Umum
Rancangan Undang Undang
Konservasi Keanekaragaman
Hayati
(RDPU - RUU KKH)**

Jakarta
15 September 2021

Outlook & Strategy: Crude Oil Production

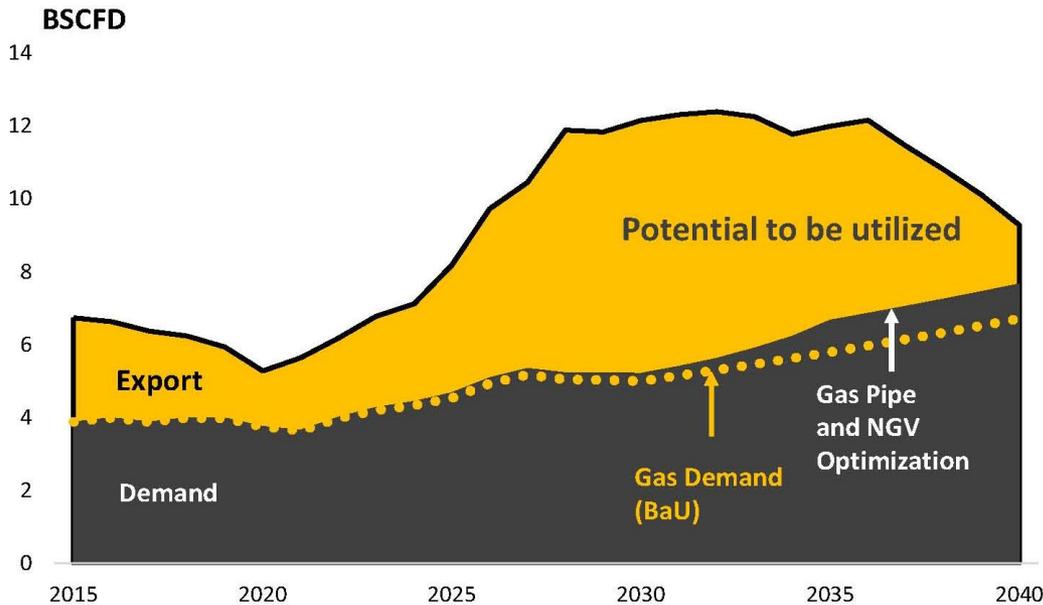


	2020	2025	2030	2040
Crude Demand*	909	993	1.491	1.491
▪ Crude Production	706	739	1.017	717
– Existing production	706	491	323	119
– Reserve to production	-	145	229	80
– EOR	-	87	223	324
– Exploration	-	17	242	194
▪ Acquisition	58	122	150	170
▪ Export	57	-	-	-
▪ Import	202	132	324	604

* Crude needs are adjusted to the increase in other targeted energy source utilization programs

Increase crude oil production 1 million bopd and acquisition of overseas oil fields for refinery needs

Outlook & Strategy: Gas Supply-Demand



	BSCFD			
	2020	2025	2030	2040
Gas Demand	3,8	4,7	5,2	7,7
▪ Gas Production	5,3	8,2	12,1*	9,3
– Existing production	5,3	4,8	2,6	0,9
– Reserve to production	-	2,9	5,8	2,6
– Exploration	-	0,5	3,7	5,8**
▪ Export	1,5	3,5	6,9	1,6

* Excludes Natuna D-Alpha

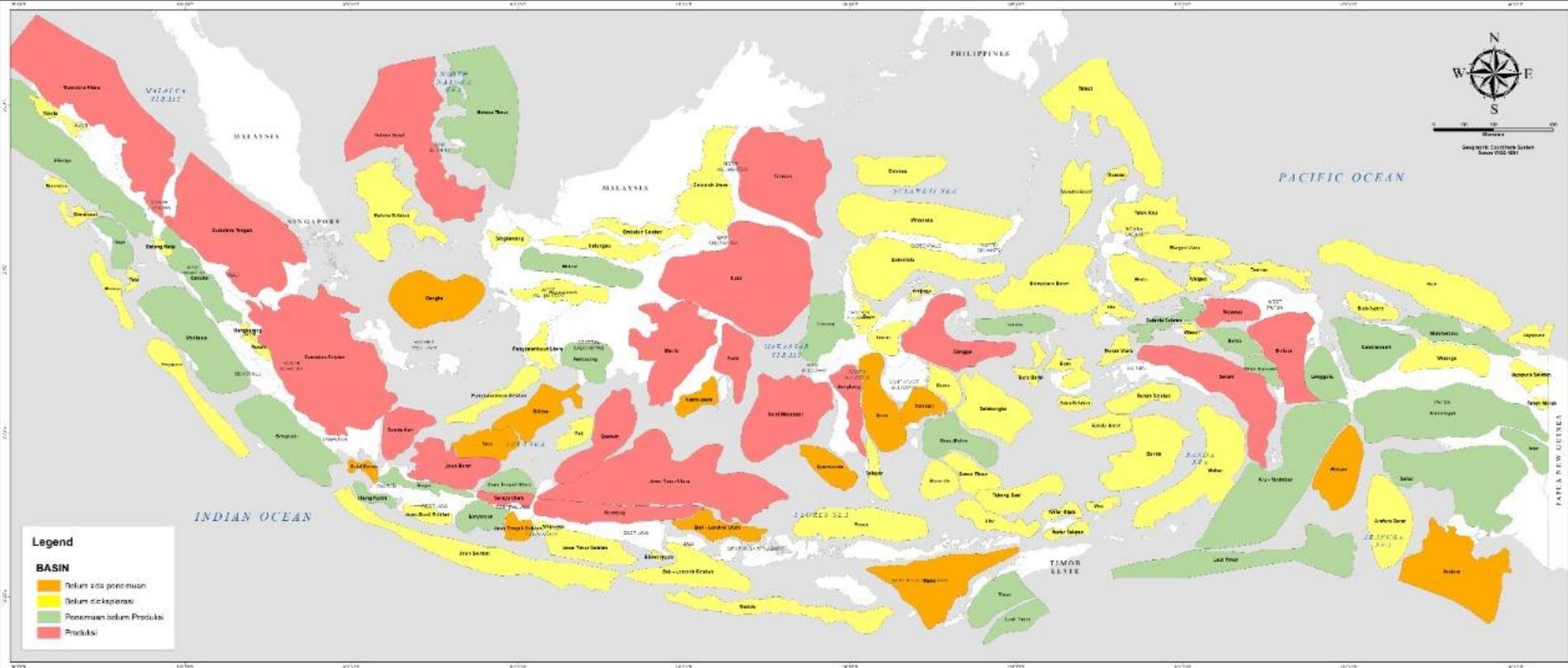
** Includes syngas production in 2037

1. Produce 500 thousand tons of Rich Gas/year starting in 2022 and increase **gas production to 12 BSCFD in 2030.**
2. **Investors and gas producers need support**, including: certainty of demand, especially from the power generation sector, the industrial sector (fertilizer, petrochemical, others), and the transportation sector, fiscal/non fiscal incentives, gas prices have taken into account the economics of the gas field, and the availability of gas infrastructure

Cekungan & Wilayah Kerja Migas

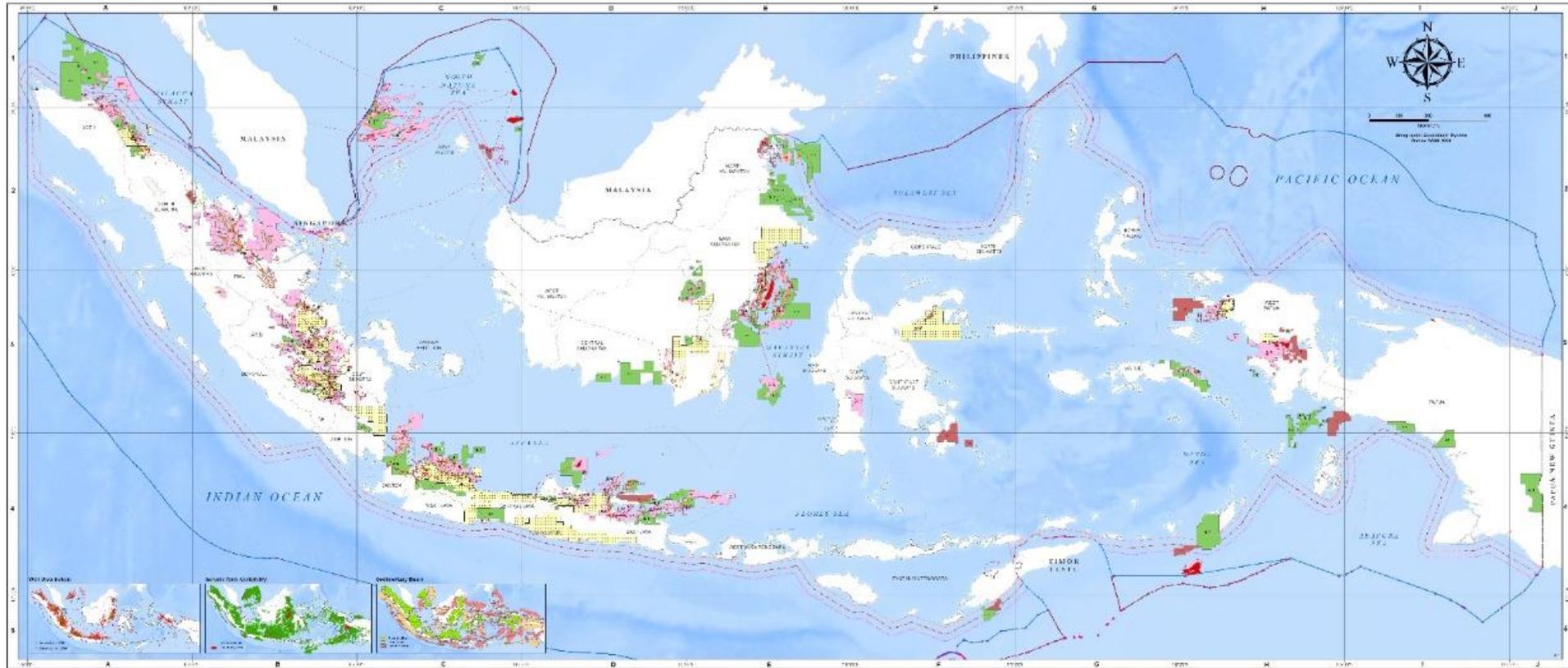


INDONESIA OIL AND GAS BASIN (2020)



“Dengan 128 cekungan, Indonesia terdapat *potensi* yang mampu meningkatkan cadangan dan produksi migas”

INDONESIA OIL & GAS WORKING AREA MAP - STATUS SEPTEMBER 2021



UPSTREAM OIL AND GAS MAP
REPUBLIC OF INDONESIA
(SKK Migas Internal Use Only)

Legend

Working Area

- SKK Migas
- SKK Migas (Subsidiary)
- SKK Migas (Joint Venture)
- SKK Migas (Partner)
- SKK Migas (Operator)
- SKK Migas (Contractor)
- SKK Migas (Service Provider)
- SKK Migas (Supplier)
- SKK Migas (Other)

Legend (Color)

- Red: Conventional
- Green: Unconventional
- Blue: Other

Legend (Symbol)

- Circle: Conventional
- Square: Unconventional
- Triangle: Other

Legend (Text)

- Conventional
- Unconventional
- Other

Legend (Scale)

- 0 - 100 - 200 km

Legend (Date)

- 2021

REGION I (SUMATRA & NATUNA ISLANDS)

1.1.1.1	1.1.1.2	1.1.1.3	1.1.1.4	1.1.1.5	1.1.1.6	1.1.1.7	1.1.1.8	1.1.1.9	1.1.1.10	1.1.1.11	1.1.1.12	1.1.1.13	1.1.1.14	1.1.1.15	1.1.1.16	1.1.1.17	1.1.1.18	1.1.1.19	1.1.1.20	1.1.1.21	1.1.1.22	1.1.1.23	1.1.1.24	1.1.1.25	1.1.1.26	1.1.1.27	1.1.1.28	1.1.1.29	1.1.1.30	1.1.1.31	1.1.1.32	1.1.1.33	1.1.1.34	1.1.1.35	1.1.1.36	1.1.1.37	1.1.1.38	1.1.1.39	1.1.1.40	1.1.1.41	1.1.1.42	1.1.1.43	1.1.1.44	1.1.1.45	1.1.1.46	1.1.1.47	1.1.1.48	1.1.1.49	1.1.1.50
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REGION II (JAVA, MADURA & KALIMANTAN)

2.1.1.1	2.1.1.2	2.1.1.3	2.1.1.4	2.1.1.5	2.1.1.6	2.1.1.7	2.1.1.8	2.1.1.9	2.1.1.10	2.1.1.11	2.1.1.12	2.1.1.13	2.1.1.14	2.1.1.15	2.1.1.16	2.1.1.17	2.1.1.18	2.1.1.19	2.1.1.20	2.1.1.21	2.1.1.22	2.1.1.23	2.1.1.24	2.1.1.25	2.1.1.26	2.1.1.27	2.1.1.28	2.1.1.29	2.1.1.30	2.1.1.31	2.1.1.32	2.1.1.33	2.1.1.34	2.1.1.35	2.1.1.36	2.1.1.37	2.1.1.38	2.1.1.39	2.1.1.40	2.1.1.41	2.1.1.42	2.1.1.43	2.1.1.44	2.1.1.45	2.1.1.46	2.1.1.47	2.1.1.48	2.1.1.49	2.1.1.50
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REGION III (SYSTEM ROOMS)

3.1.1.1	3.1.1.2	3.1.1.3	3.1.1.4	3.1.1.5	3.1.1.6	3.1.1.7	3.1.1.8	3.1.1.9	3.1.1.10	3.1.1.11	3.1.1.12	3.1.1.13	3.1.1.14	3.1.1.15	3.1.1.16	3.1.1.17	3.1.1.18	3.1.1.19	3.1.1.20	3.1.1.21	3.1.1.22	3.1.1.23	3.1.1.24	3.1.1.25	3.1.1.26	3.1.1.27	3.1.1.28	3.1.1.29	3.1.1.30	3.1.1.31	3.1.1.32	3.1.1.33	3.1.1.34	3.1.1.35	3.1.1.36	3.1.1.37	3.1.1.38	3.1.1.39	3.1.1.40	3.1.1.41	3.1.1.42	3.1.1.43	3.1.1.44	3.1.1.45	3.1.1.46	3.1.1.47	3.1.1.48	3.1.1.49	3.1.1.50
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UNCONVENTIONAL

SUMATRA

4.1.1.1	4.1.1.2	4.1.1.3	4.1.1.4	4.1.1.5	4.1.1.6	4.1.1.7	4.1.1.8	4.1.1.9	4.1.1.10	4.1.1.11	4.1.1.12	4.1.1.13	4.1.1.14	4.1.1.15	4.1.1.16	4.1.1.17	4.1.1.18	4.1.1.19	4.1.1.20	4.1.1.21	4.1.1.22	4.1.1.23	4.1.1.24	4.1.1.25	4.1.1.26	4.1.1.27	4.1.1.28	4.1.1.29	4.1.1.30	4.1.1.31	4.1.1.32	4.1.1.33	4.1.1.34	4.1.1.35	4.1.1.36	4.1.1.37	4.1.1.38	4.1.1.39	4.1.1.40	4.1.1.41	4.1.1.42	4.1.1.43	4.1.1.44	4.1.1.45	4.1.1.46	4.1.1.47	4.1.1.48	4.1.1.49	4.1.1.50
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KALIMANTAN

4.2.1.1	4.2.1.2	4.2.1.3	4.2.1.4	4.2.1.5	4.2.1.6	4.2.1.7	4.2.1.8	4.2.1.9	4.2.1.10	4.2.1.11	4.2.1.12	4.2.1.13	4.2.1.14	4.2.1.15	4.2.1.16	4.2.1.17	4.2.1.18	4.2.1.19	4.2.1.20	4.2.1.21	4.2.1.22	4.2.1.23	4.2.1.24	4.2.1.25	4.2.1.26	4.2.1.27	4.2.1.28	4.2.1.29	4.2.1.30	4.2.1.31	4.2.1.32	4.2.1.33	4.2.1.34	4.2.1.35	4.2.1.36	4.2.1.37	4.2.1.38	4.2.1.39	4.2.1.40	4.2.1.41	4.2.1.42	4.2.1.43	4.2.1.44	4.2.1.45	4.2.1.46	4.2.1.47	4.2.1.48	4.2.1.49	4.2.1.50
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Tantangan terkait KKH

- Akses untuk eksplorasi & fasilitas produksi (sumur / pipa) yang sudah ada dalam kawasan
- Akses potensi sumber daya migas dalam kawasan.
- Kegiatan pada wilayah kerja yang *overlaying* (tumpang tindih), berbatasan, atau berdekatan dengan **kawasan konservasi** atau **ekosistem penting**.



Ekplorasi Migas di Kawasan Konservasi

Canada memberikan ijin kepada BP untuk melakukan ekplorasi Migas di Area Konservasi Laut

Amerika: 5.002 sumur & 2.155 km dari 595 jalur pipa di area (NWRS, *National Wildlife Refuge System*) – Sistem suaka margasatwa nasional

Ekstraksi Migas diizinkan secara hukum di dalam kawasan lindung di **Uganda**, seperti banyak **negara Afrika lainnya**, dan bahwa **otoritas satwa liar** dan **perusahaan minyak** beradaptasi untuk hidup berdampingan di dalam kawasan lindung



Usulan

1. Penguatan Kawasan Konservasi Keanekaragaman Hayati (KKH) dan Penetapan Wilayah Kerja (WK) secara *vice-versa* perlu rekomendasi KL terkait; dengan mempertimbangkan:
 - a) WK/ Kegiatan yang sudah ada
 - b) Potensi Ekplorasi/ Eksploitasi.Usul menambahkan: “*rekomendasi /konsultasi dengan kementerian/lembaga terkait*” pada pasal 63 RUU KKH.

2. Pemanfaatan **kawasan jasa ekosistem** untuk mengakses sumber daya energi (baik masa air, panas bumi, atau migas) sejalan dengan upaya mempertahankan fungsi ekosistem & memperkuat pemanfaatan jasa ekosistem untuk kepentingan khusus. Pasal 102, 103 & 104 RUU KKH.

Indonesian Petroleum Association

TERIMA KASIH

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