

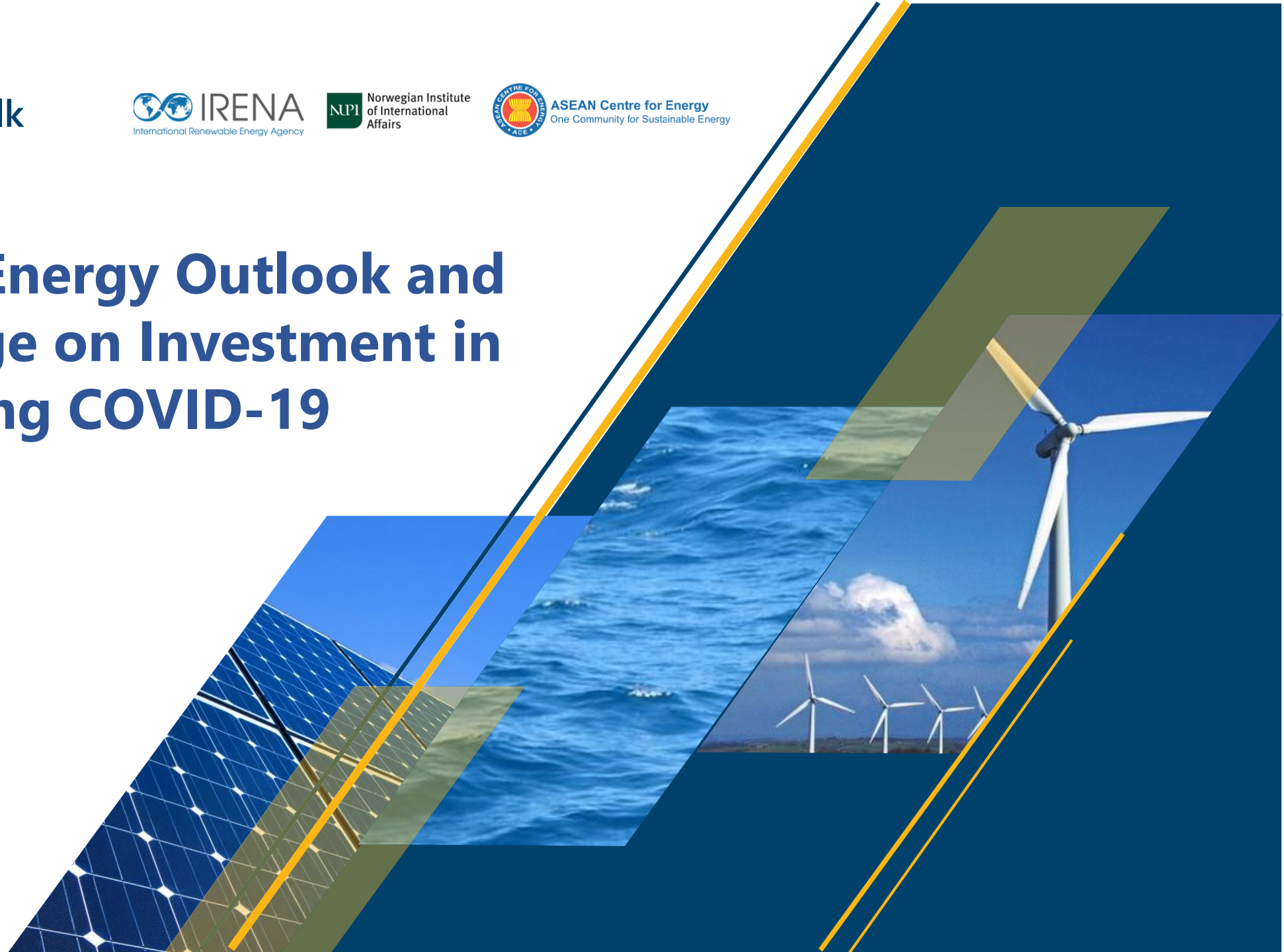


Launching Talk



# Renewable Energy Outlook and the Challenge on Investment in ASEAN during COVID-19 Pandemic

**Thursday,  
6 August 2020**  
14.00 to 15.30  
(GMT+7)





## Renewable Energy Outlook and the Challenge on Investment in ASEAN during COVID-19 Pandemic

### Introductory Note



**H.E. Morten Høglund**  
Ambassador of  
Norway for ASEAN



**Dr Nuki Agya Utama**  
Executive Director, ASEAN  
Centre for Energy (ACE)

### Moderator



**Nadhilah Shani**  
Modelling and  
Policy Planning  
(MPP) Officer,  
ASEAN Centre for  
Energy (ACE)



**Badariah Yosiyana**  
Programme Officer,  
South East Asia,  
International Renewable  
Energy Agency (IRENA)

### Speakers



**Dr Roman Vakulchuk**  
Senior Research Fellow,  
Norwegian Institute of  
International Affairs  
(NUI)



**Dr Zulfikar Yurnaidi**  
Senior Officer of  
Sustainable Energy,  
Renewable Energy, and  
Energy Efficiency (REE),  
ASEAN Centre for  
Energy (ACE)



# Renewable Energy Outlook and the Challenge on Investment in ASEAN during COVID-19 Pandemic

## Agenda:

1. Introductory Note
2. Topic 1
3. Topic 2
4. Topic 3
5. Q&A



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# Introductory Note



**Dr Nuki Agya Utama**  
Executive Director, ASEAN  
Centre for Energy (ACE)

GoToWebinar | 06 August 2020

Organised by: ASEAN Climate Change and  
Energy Project (ACCEPT)



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# Introductory Note



**H.E. Morten Høglund**  
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# Topic 1



**Badariah Yosiyana**  
Programme Officer,  
South East Asia,  
International Renewable  
Energy Agency (IRENA)

GoToWebinar | 06 August 2020

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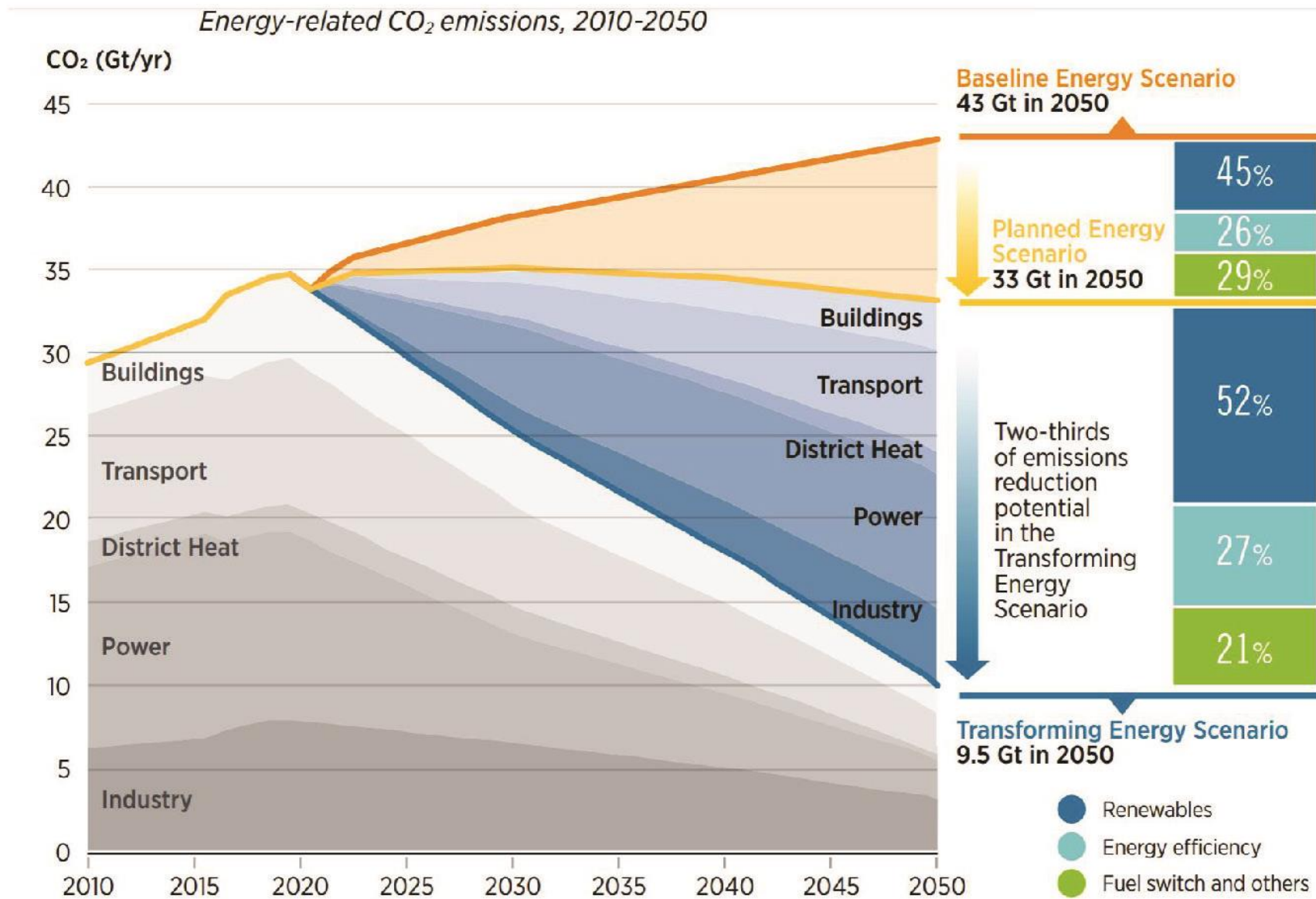
# GLOBAL RENEWABLES OUTLOOK

## Strategies of Post-COVID Recovery and Renewable Energy Outlook for Southeast Asia

Badariah Yosiyana,  
Programme Officer, Southeast Asia



# Renewables and efficiency key to meeting global climate goals



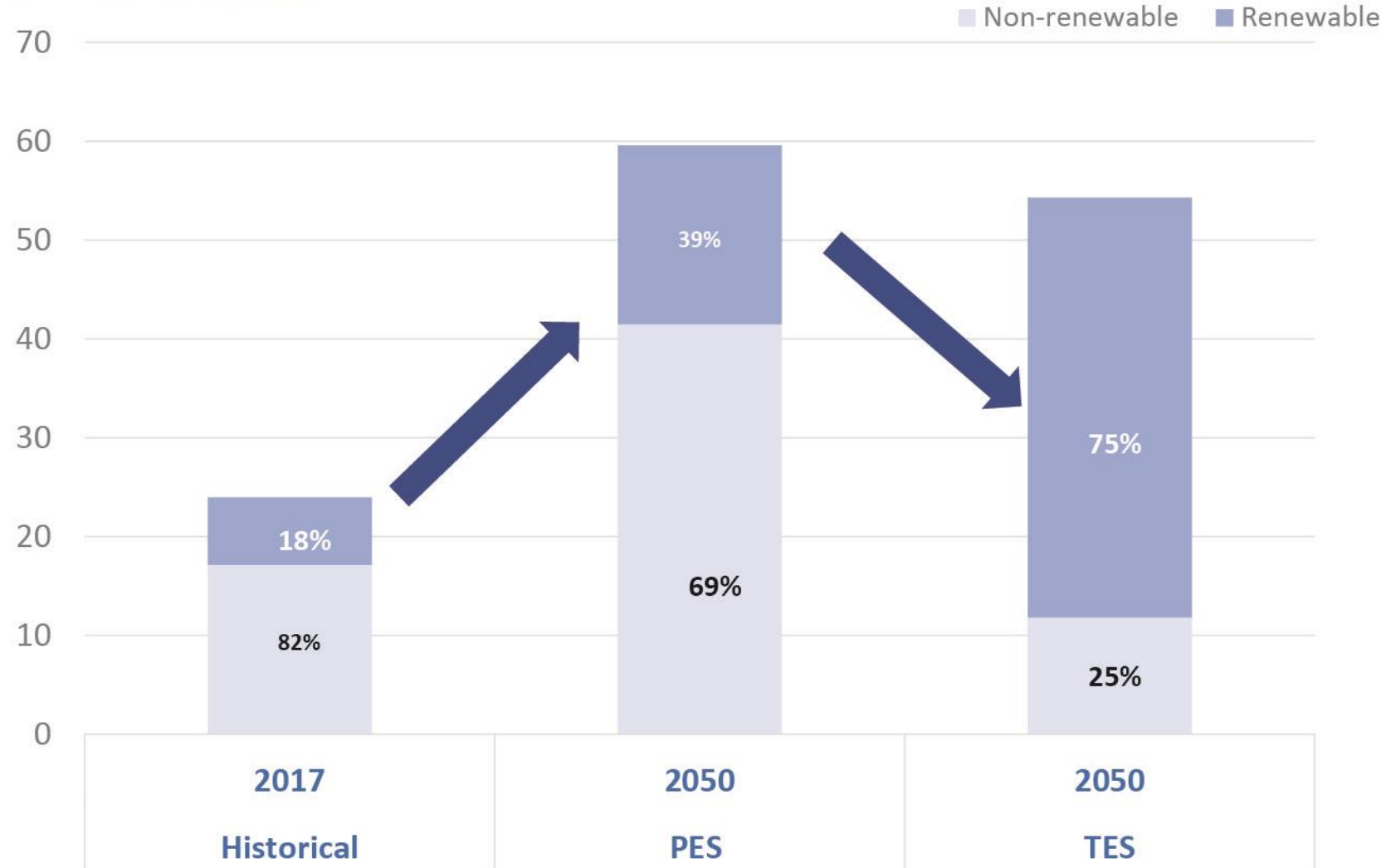
Based on IRENA analysis





# IRENA's Transforming Energy Scenario pathway for Southeast Asia

Total primary energy supply (EJ/yr)

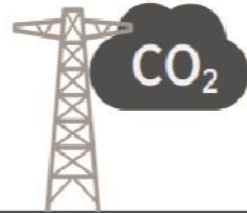




# IRENA's Transforming Energy Scenario pathway for Southeast Asia

## Emissions

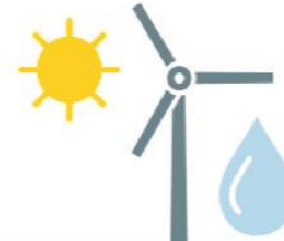
Energy-related CO<sub>2</sub>  
(Gt CO<sub>2</sub>/yr)



2017                      2030                      2050

|                               |                               |                               |
|-------------------------------|-------------------------------|-------------------------------|
| 1.4<br>Gt CO <sub>2</sub> /yr | 1.6<br>Gt CO <sub>2</sub> /yr | 0.8<br>Gt CO <sub>2</sub> /yr |
|-------------------------------|-------------------------------|-------------------------------|

## Renewable energy share in power generation (%)



2017                      2030                      2050

|     |     |     |
|-----|-----|-----|
| 20% | 53% | 85% |
|-----|-----|-----|

## Clean energy investments (USD billion per year)



2016-2030                      2016-2050

|             |             |
|-------------|-------------|
| 143 USD bln | 141 USD bln |
|-------------|-------------|



Improved energy efficiency leading to lower energy consumption per capita

## Southeast Asia

| 2017 | Where we are heading |            |            | Where we need to be |            |            |
|------|----------------------|------------|------------|---------------------|------------|------------|
|      | 2030 (PES)           | 2040 (PES) | 2050 (PES) | 2030 (TES)          | 2040 (TES) | 2050 (TES) |

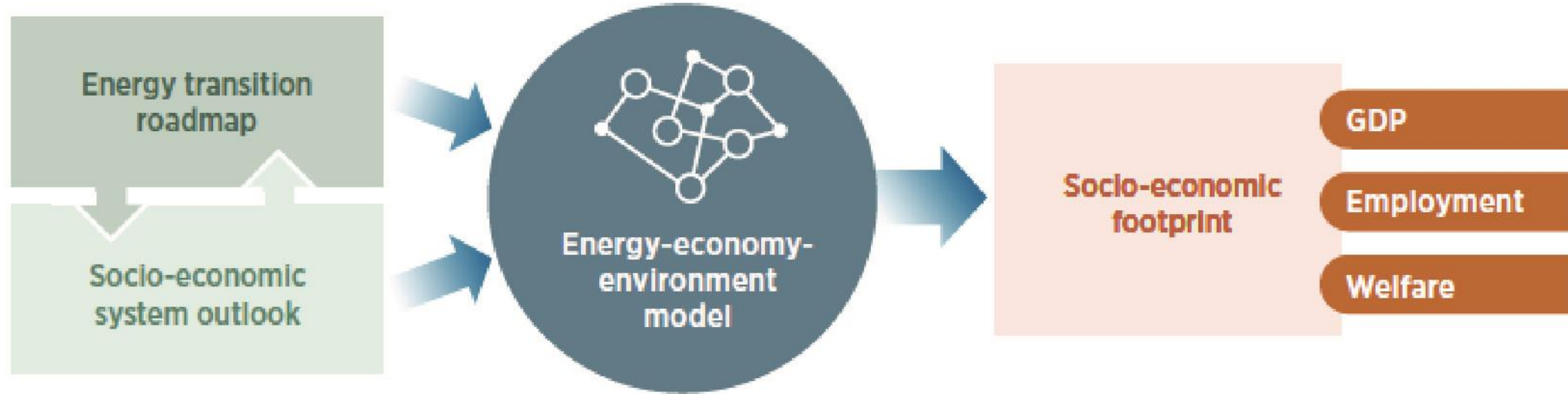
### Energy consumption per capita (GJ/capita)

| Consumption (TFEC) per capita | 28 | 29 | 35 | 40 | 29 | 33 | 35 |
|-------------------------------|----|----|----|----|----|----|----|
|-------------------------------|----|----|----|----|----|----|----|





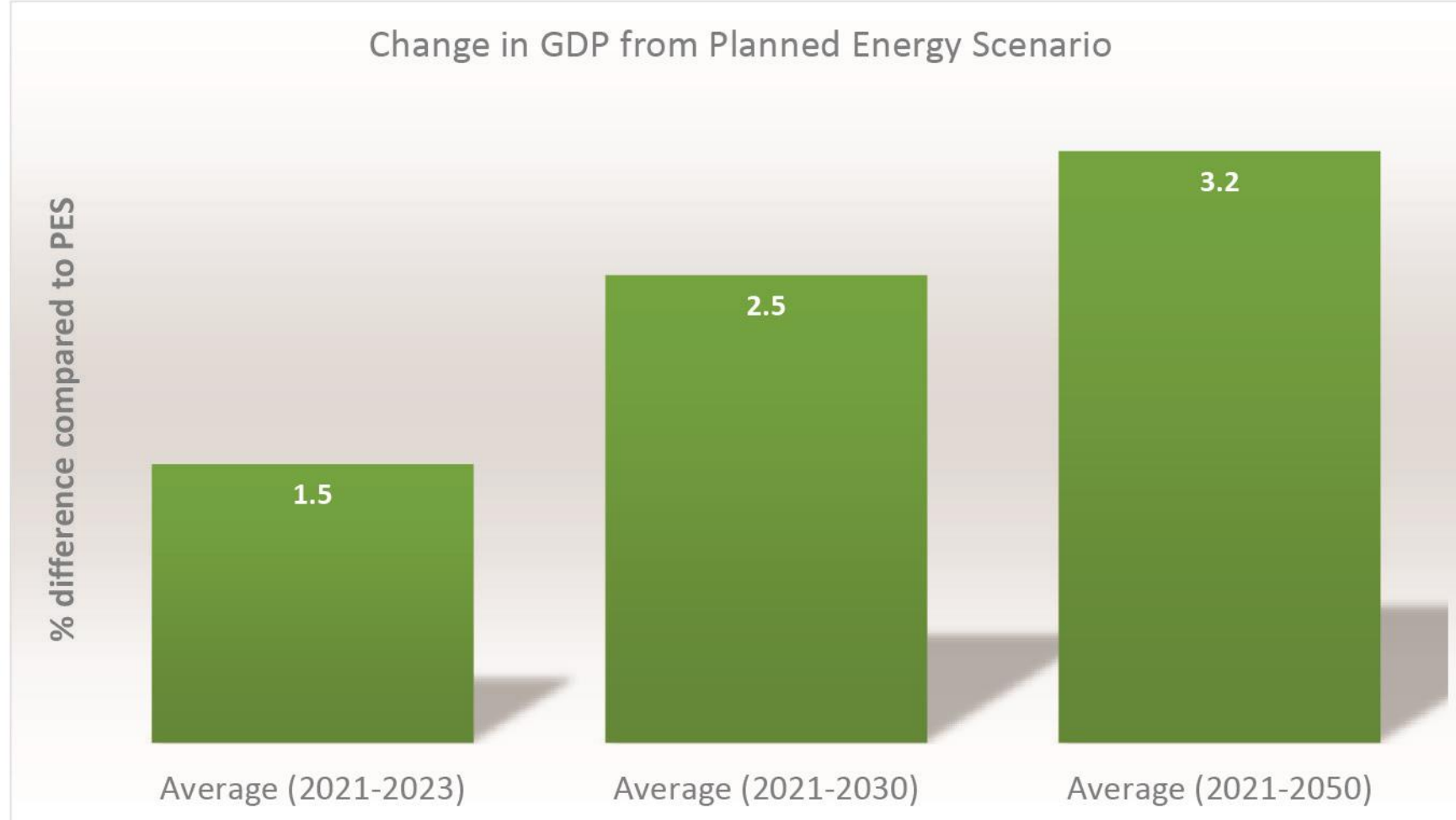
# The need for a holistic approach to understand the socio-economic impacts of the energy transition



- A true and complete assessment of the transition includes both the energy sector and the socioeconomic system, and their interlinkages.
- IRENA has undertaken a holistic approach that links the energy system and the economies within a single and consistent quantitative framework, and analyses variables such as GDP, employment and welfare.



## Boost in Southeast Asia economy, as measured by GDP



**The GDP of Southeast Asia improves by 2.9% in 2050, compared to the Planned Energy Scenario. In absolute terms, it amounts to additional USD 5.64 trillion.**



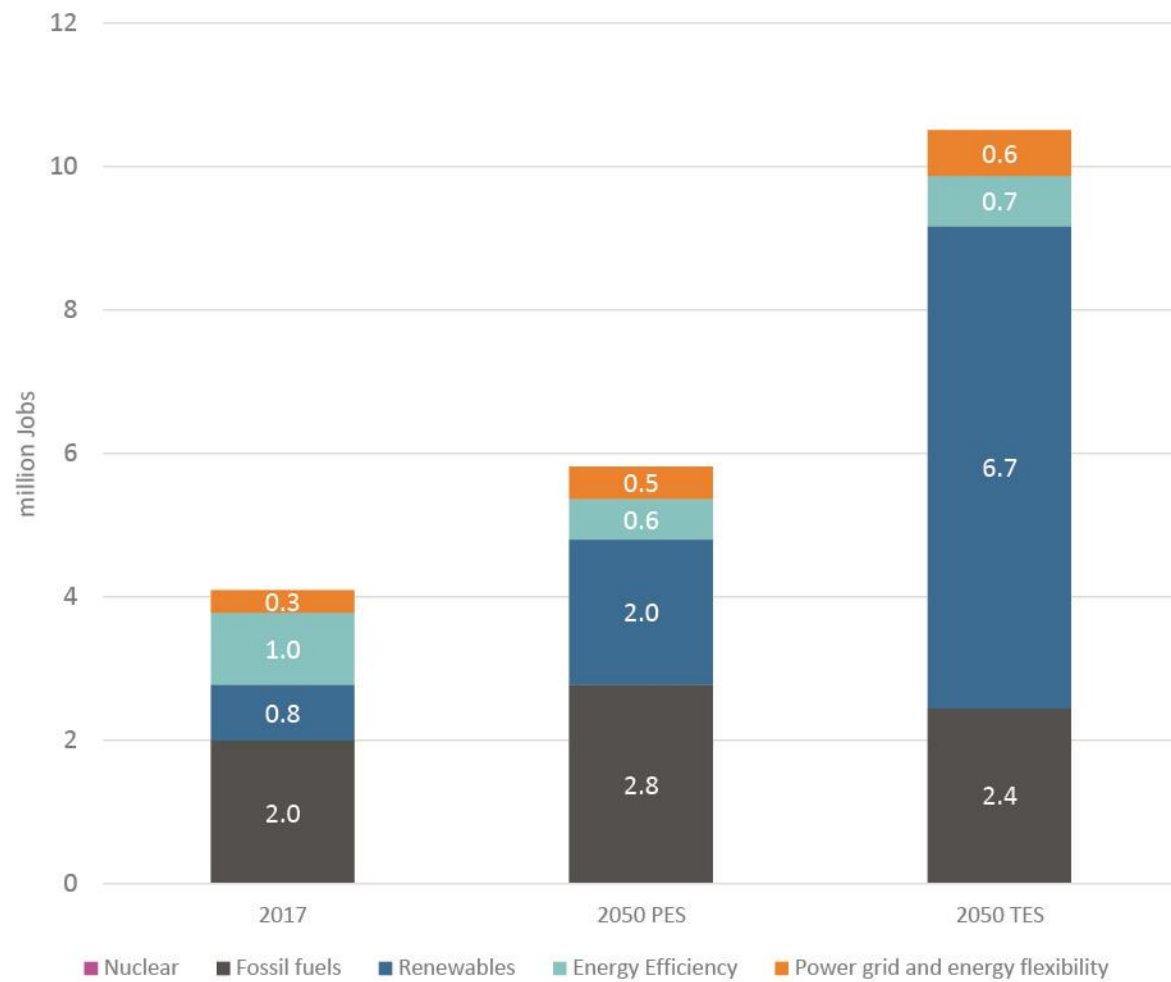


# All regions see gains in energy sector jobs, including Southeast Asia

Difference in employment by 2050 between the Transforming Energy and Planned Energy scenarios, by region and sector (in millions)



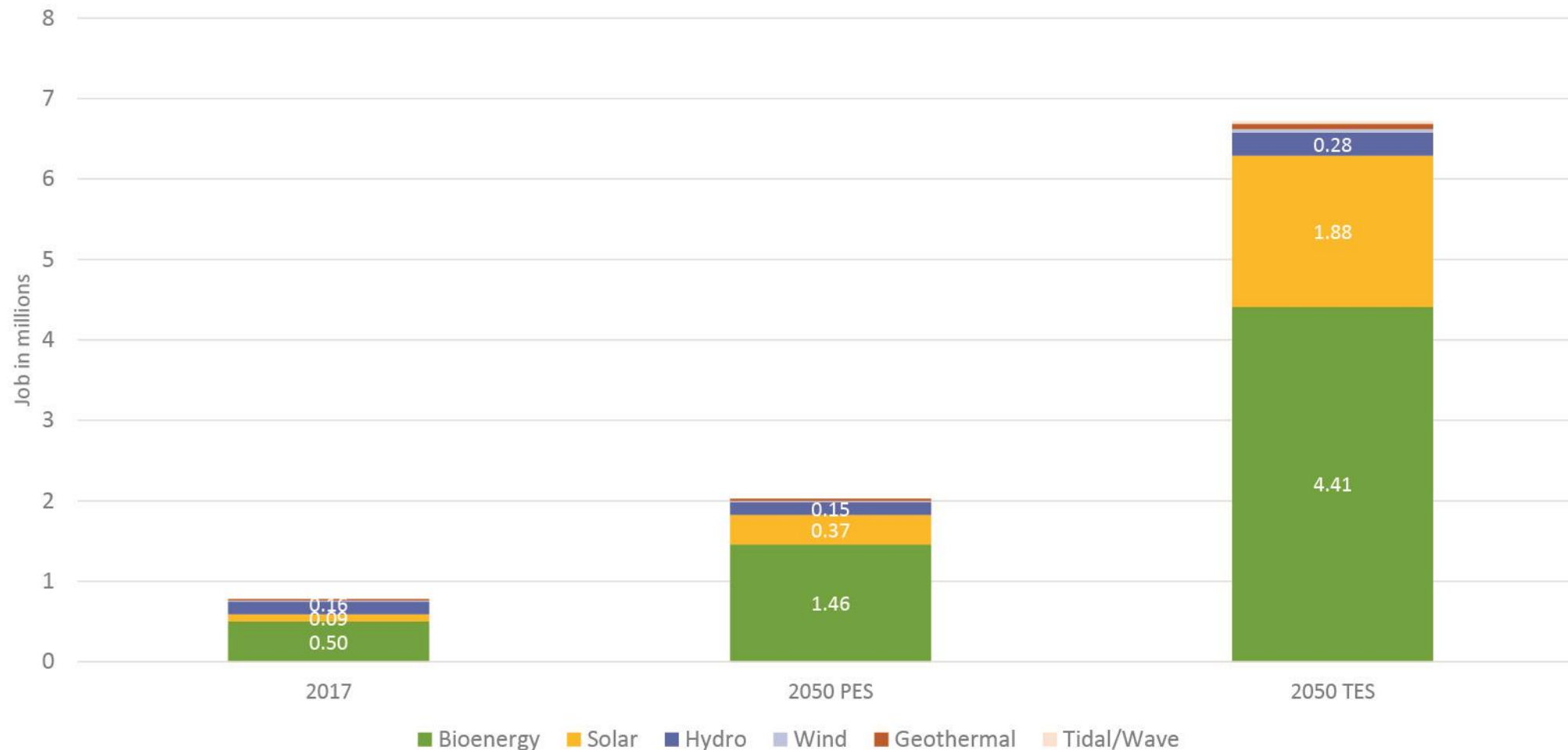
Source: IRENA analysis







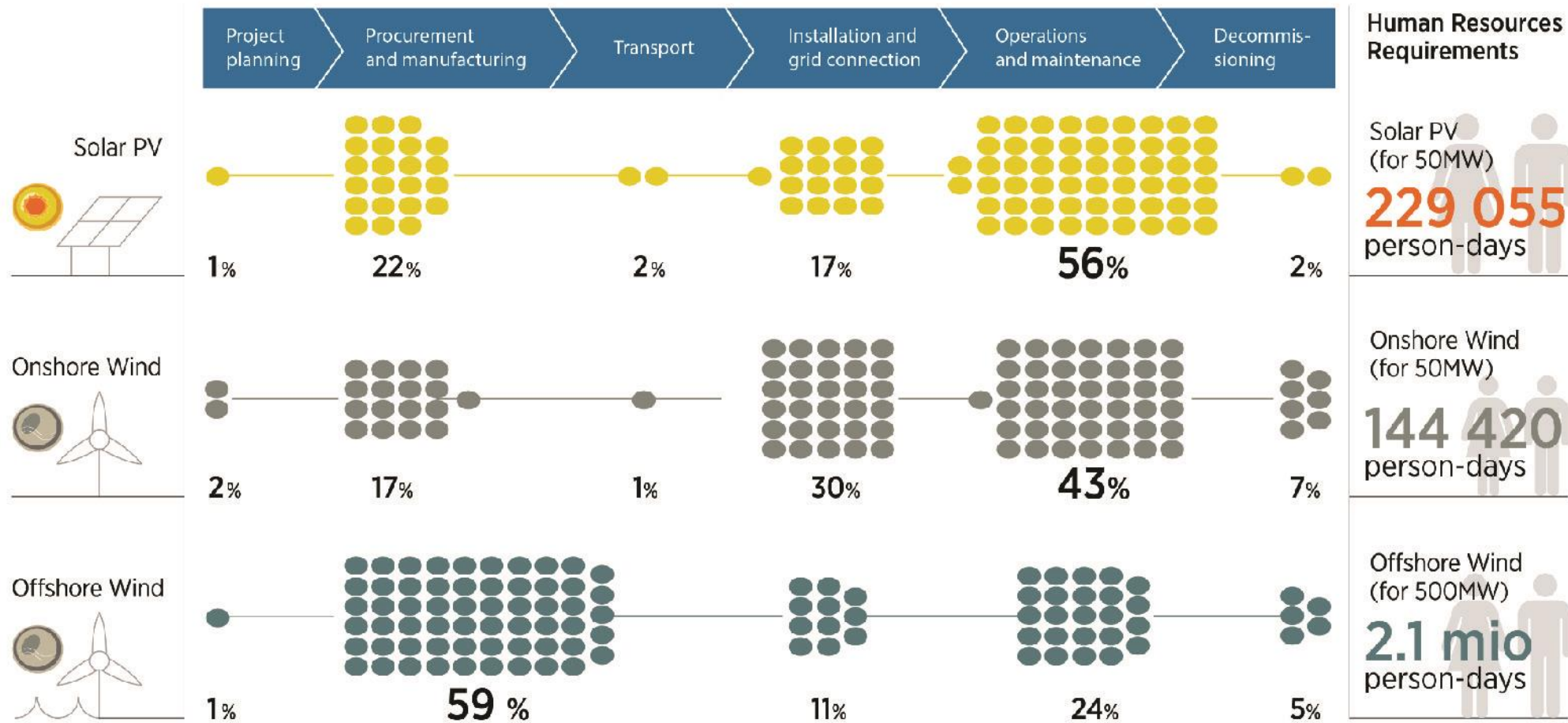
# Bioenergy creates the most jobs in renewables in Southeast Asia



**Jobs in renewables almost double compared to the Planned Energy Scenario, reaching 6.7 million in 2050.**



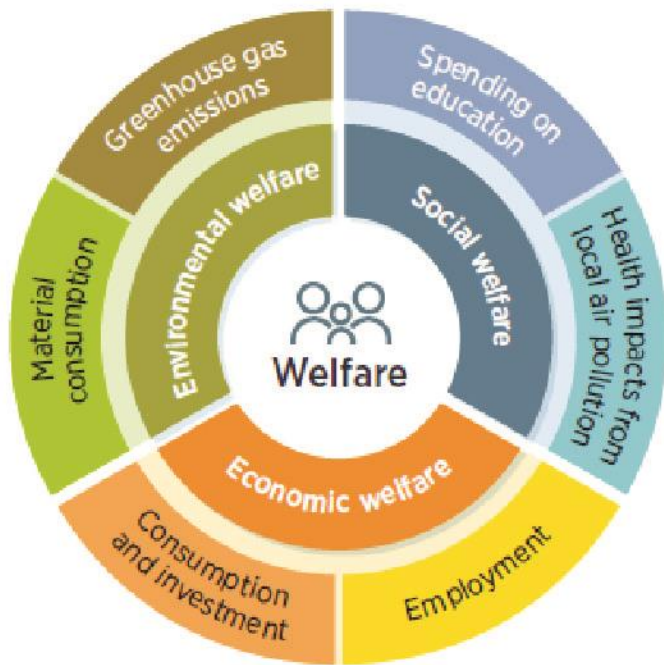
# Employment along several important renewable value chains



Policy makers need to recognise how many renewable energy jobs can be created along each segment of the value chain, so they can design green recovery programmes that maximise regional and national value creation.



# Improvement in welfare



## Welfare improvement (%): TES vs. PES

|                  | 2030       | 2050        |
|------------------|------------|-------------|
| <b>Indicator</b> |            |             |
| Economic         | 0.1        | 0.0         |
| Social           | 1.5        | 7.7         |
| Environmental    | 1.6        | 3.5         |
| <b>Total</b>     | <b>3.2</b> | <b>11.2</b> |

Welfare improves by 3.2% in 2030 and 11.2% in 2050, primarily due to improvement in health and GHG emission reduction



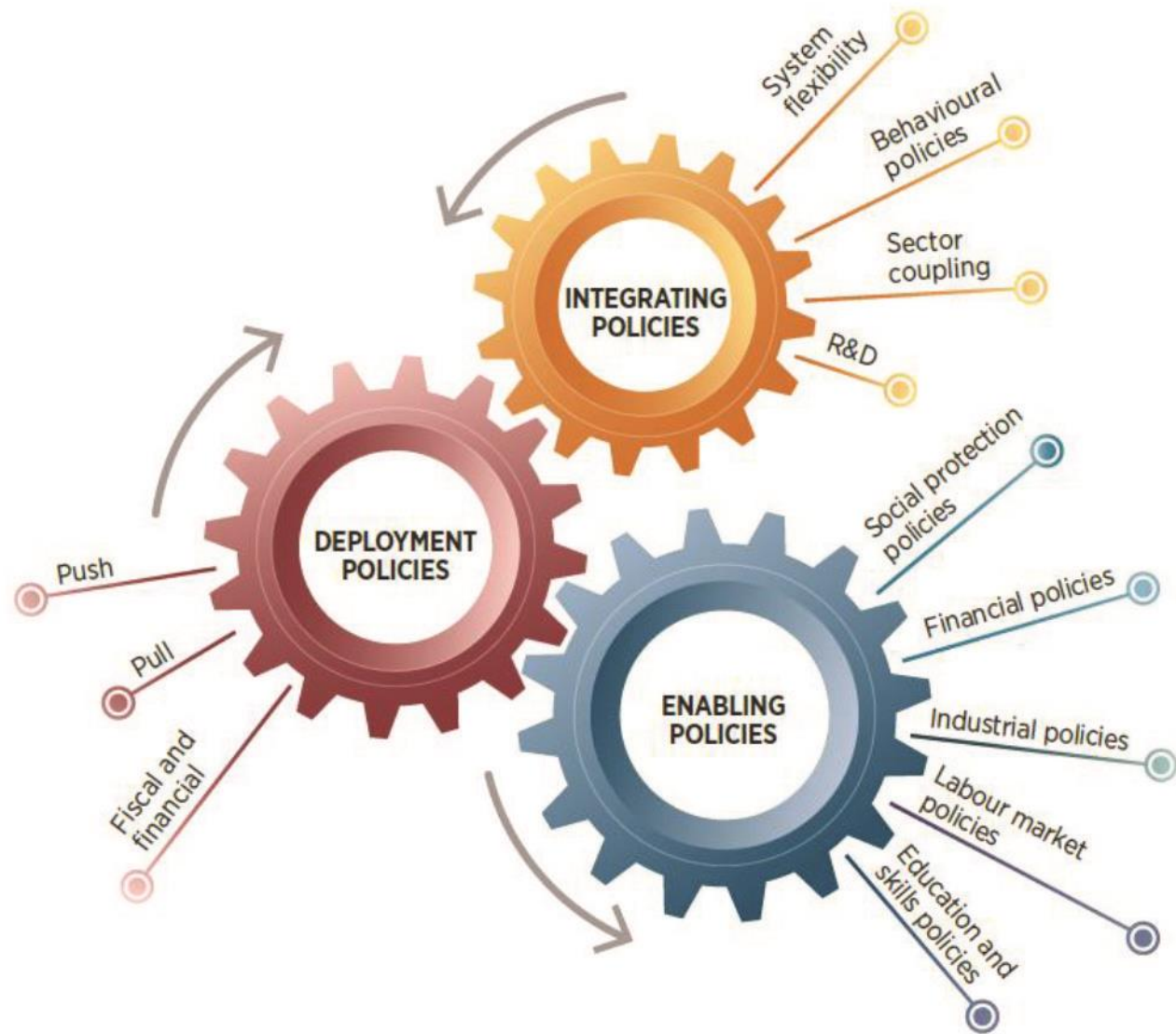


# Objectives for the recovery and the energy transition





# Policy interventions for a decarbonised society



- Investing in clean energy infrastructure is critical, and as essential is investing in people and institutions to support the transition.
- Successful stimulus and recovery packages call for policy cohesion and increased international co-operation.





# IRENA's Socioeconomic impact analyses

## Jobs Annual Review series

2011

2012

2013

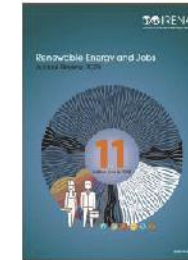
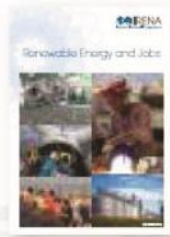
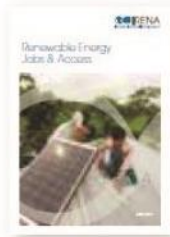
2014

2015

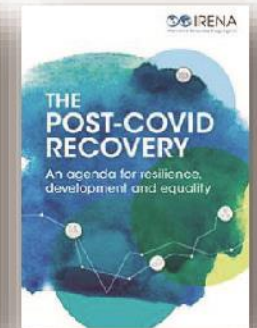
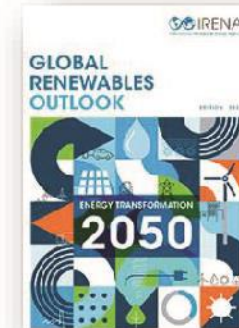
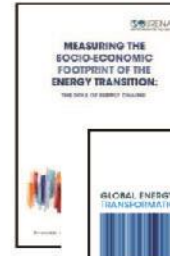
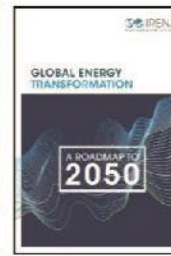
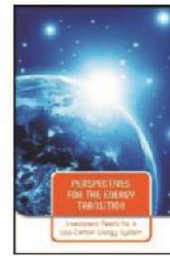
2016

2017

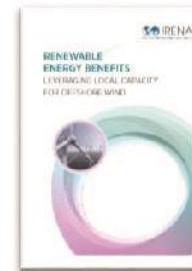
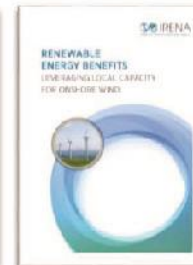
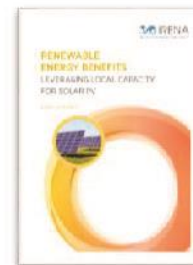
2018



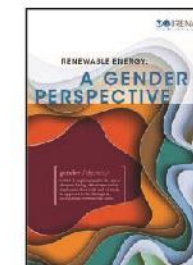
## Socioeconomic impact analysis



## Leveraging Local Capacities series



## Empowering Women, local communities and livelihood benefits





# Thank you



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# Launching Policy Briefs RE Investment Series





Launching Talk



## Topic 2



**Dr Roman Vakulchuk**  
Senior Research Fellow,  
Norwegian Institute of  
International Affairs  
(NUPI)

GoToWebinar | 06 August 2020

Organised by: ASEAN Climate Change and  
Energy Project (ACCEPT)

# Action plan to attract more investment in renewable energy in the ASEAN countries

Dr Roman Vakulchuk,  
Senior Researcher  
NUPI







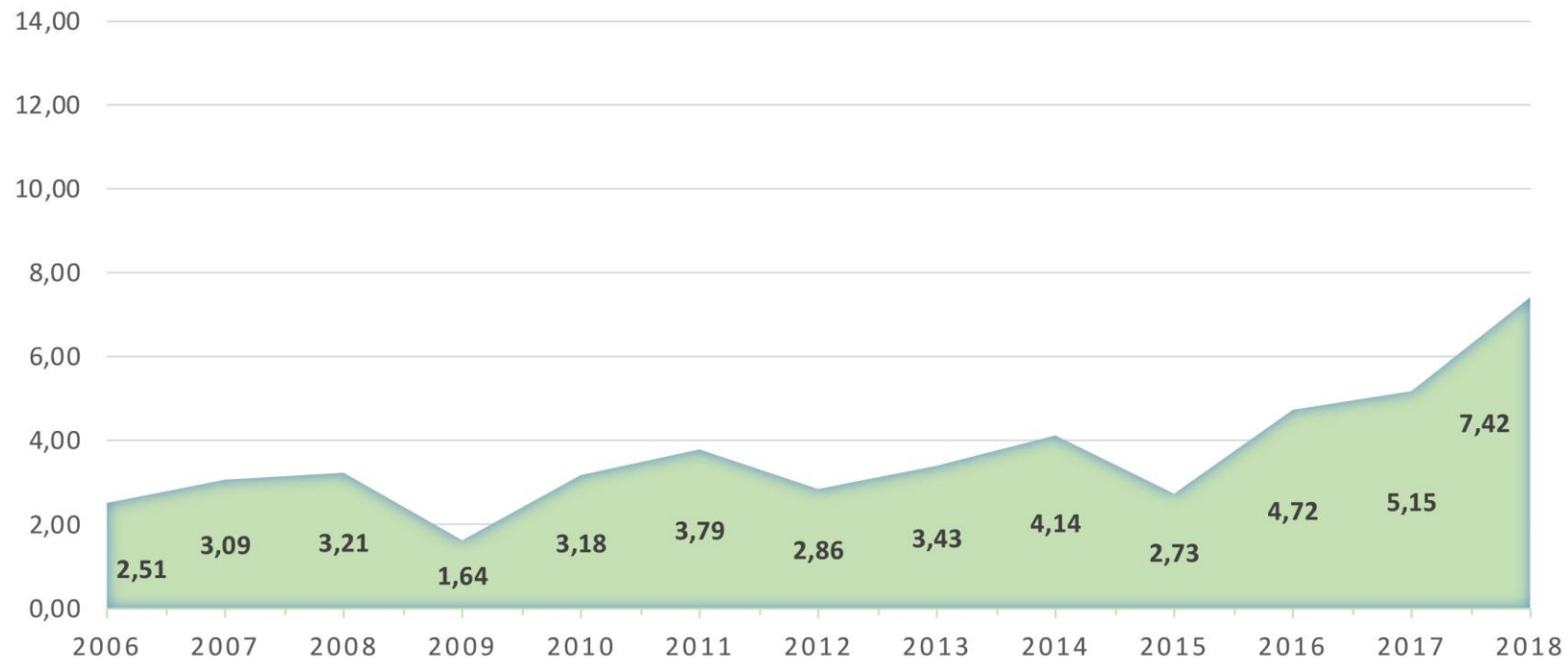
# The global race for investment in renewable energy

- The competition for renewable energy investment has been heating up globally
- In 2018, global investment increased by 206% compared to 2006 (from USD 89 billion to USD 272.9 billion)
- 513% increase in developing countries vs. 93% in developed ones
- ASEAN has not been part of the global trend



- ASEAN target: **23%** renewable energy in the energy mix by 2025
- ASEAN needs to attract USD **27 billion** in renewables every year from 2019 onwards
- In 2018, it attracted USD **7.42 billion**

## Total investment in renewable energy in ASEAN 2006–2018 (billion USD)



Sources: BNEF (2017); IRENA (2018); UN Environment, Frankfurt School-UNEP Centre, Bloomberg, NEF (2019).

# Renewable energy legislation progress in AMS

| Type of policy                         |  | Philippines | Vietnam   | Indonesia | Malaysia  | Thailand | Singapore | Myanmar  | Laos     | Brunei   | Cambodia |
|--|--|-------------|-----------|-----------|-----------|----------|-----------|----------|----------|----------|----------|
| Regulatory policies                    | 1. Renewable energy targets                        | •           | •         | •         | •         | •        | •         | •        | •        | •        | •        |
|  | 2. Renewable energy in INDC or NDC                 | •           | •         | •         | •         | •        | •         | •        | •        | •        |          |
|  | 3. Feed-in tariff/auctions/premium payment         | •           | •         | •         | •         | •        |           |          |          |          |          |
|  | 4. Electric utility quota obligation/RPS           | •           | •         | •         | •         |          |           |          |          |          |          |
|  | 5. Net metering/billing/direct consumption-supply  | •           | •         | •         | •         |          | •         |          |          |          |          |
|  | 6. Biofuel blend obligation/mandate/target         | •           | •         | •         | •         | •        |           |          |          |          |          |
|  | 7. Tradable REC                                    |             | •         |           |           |          |           |          |          |          |          |
| Fiscal incentives and public financing | 8. Tendering                                       | •           |           | •         | •         |          | •         |          |          |          |          |
|  | 9. Tax incentives                                  | •           | •         | •         | •         | •        |           | •        | •        |          | •        |
|  | 10. Investment or production tax credits           | •           | •         | •         |           |          |           |          |          |          |          |
|  | 11. Reductions in sales, CO2, VAT or taxes         | •           | •         | •         | •         | •        |           | •        |          |          |          |
|  | 12. Energy production payments                     | •           |           |           |           | •        |           |          |          |          |          |
|  | 13. Public investment/loans/grants/capital/rebates | •           | •         | •         | •         | •        | •         |          | •        |          |          |
| <b>Total</b>                           |  | <b>12</b>   | <b>11</b> | <b>11</b> | <b>10</b> | <b>8</b> | <b>5</b>  | <b>4</b> | <b>3</b> | <b>2</b> | <b>2</b> |

Sources: REN (2019); ACE (2020).

## Regulatory Indicators for Sustainable Energy (WB, 2018)

|                    | Total score | (1) Legal framework for RE | (2) Planning for RE expansion | (3) Incentives and regulatory support | (4) Attributes of financial and regulatory incentives | (5) Network connection and use | (6) Counter-party risk | (7) Carbon pricing and monitoring |
|--------------------|-------------|----------------------------|-------------------------------|---------------------------------------|---|--------------------------------|------------------------|-----------------------------------|
| <b>Vietnam</b> 32  | 467         | 100                        | 98                            | 79                                    | 58  | 66                             | 66                     | 0                                 |
| <b>Philippines</b> | 437         | 100                        | 59                            | 77                                    | 83  | 53                             | 65                     | 0                                 |
| <b>Malaysia</b>    | 404         | 100                        | 71                            | 70                                    | 58  | 32                             | 73                     | 0                                 |
| <b>Singapore</b>   | 377         | 100                        | 64                            | 19                                    | 67  | 60                             | 67                     | 0                                 |
| <b>Indonesia</b>   | 376         | 100                        | 66                            | 31                                    | 33  | 13                             | 83                     | 50                                |
| <b>Thailand</b>    | 329         | 50                         | 56                            | 56                                    | 67  | 20                             | 80                     | 0                                 |
| <b>Cambodia</b>    | 289         | 100                        | 15                            | 18                                    | 0   | 30                             | 76                     | 50                                |
| <b>Laos</b>        | 214         | 100                        | 55                            | 27                                    | 8   | 7                              | 17                     | 0                                 |
| <b>Myanmar</b> 111 | 195         | 50                         | 48                            | 34                                    | 17  | 6                              | 40                     | 0                                 |

### In 2018:

- **146** countries had renewable energy targets
- **138** established support policies
- **113** passed national renewable energy laws



## Vietnam success story



*Southern Vietnam's Binh Thuan province: wind turbine and solar panels (source: The ASEAN Post 2020).*

## Key barriers that limit investment

- Limited governance capacity to promote renewable energy
- Investors *expect* that relevant institutions are established to support and implement advanced legislation
- Limited human resources
- Weakly developed financial markets

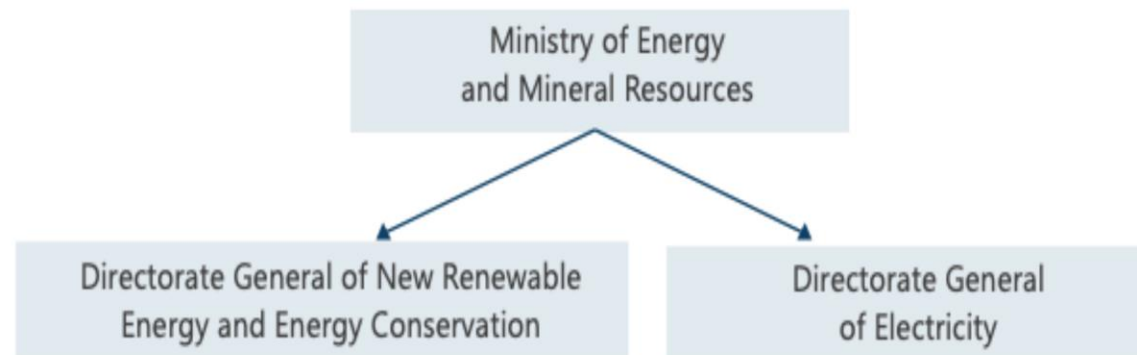
## Action plan (I)

- Initiate major governance reform in favour of renewable energy
- Set up a **ministry of renewable energy**

Example: Current energy governance in Indonesia

Main energy body

Smaller government bodies responsible for renewable energy



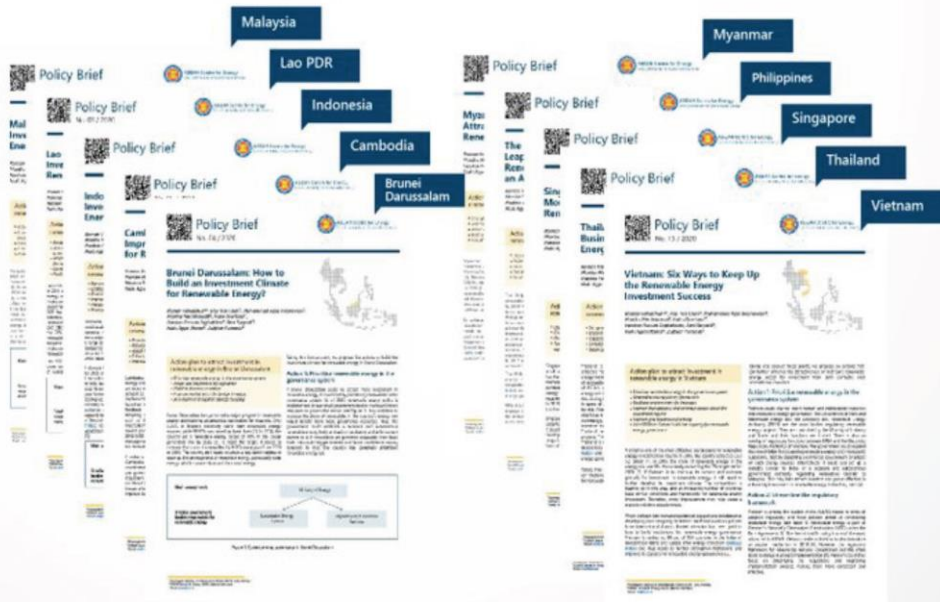
## Setting up a separate renewable energy ministry/body has clear advantages



## Action plan (II)

- Build capacity for renewable energy governance (requesting more targeted support from IRENA)
- Prioritise renewables in the regulatory framework
- Facilitate market entry for investors and mobilise domestic investors
- Improve bankability of renewable energy projects





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## Topic 3



**Dr Zulfikar Yurnaidi**  
Senior Officer of  
Sustainable Energy,  
Renewable Energy, and  
Energy Efficiency (REE),  
ASEAN Centre for  
Energy (ACE)

GoToWebinar | 06 August 2020

Organised by: ASEAN Climate Change and  
Energy Project (ACCEPT)

**Launching Talk – Renewable Energy Outlook and the Challenge on Investment in ASEAN during Covid-19 Pandemic**

# **Covid-19 Impacts on RE Sector in ASEAN**

**August 6<sup>th</sup>, 2020**

Presented by:  
**Zulfikar Yurnaidi, Senior REE Officer**  
**ASEAN Centre for Energy**



**One Community  
for Sustainable  
Energy**

# About ACCEPT

- Three years' project (2018-2021), supported under Norwegian-ASEAN Regional Integration Programme (NARIP).
- Aims to produce analysis and actionable recommendations to make ASEAN energy policies more coherent along two axes: the axis between energy policy and energy-related climate policy within each ASEAN country, and the axis between policies at the national and regional levels.

“

We welcomed the ACCEPT to support ASEAN in improving the coherence between the ASEAN energy and climate policies and contribute to more climate-friendly development of the energy sector.

”

Joint Ministerial Statement (JMS)  
of the 37th The ASEAN Ministers on  
Energy Meeting (AMEM),  
Bangkok, 4 September 2019.

7 AFFORDABLE AND  
CLEAN ENERGY



13 CLIMATE  
ACTION













# ACCEPT

ASEAN Climate Change and Energy Project

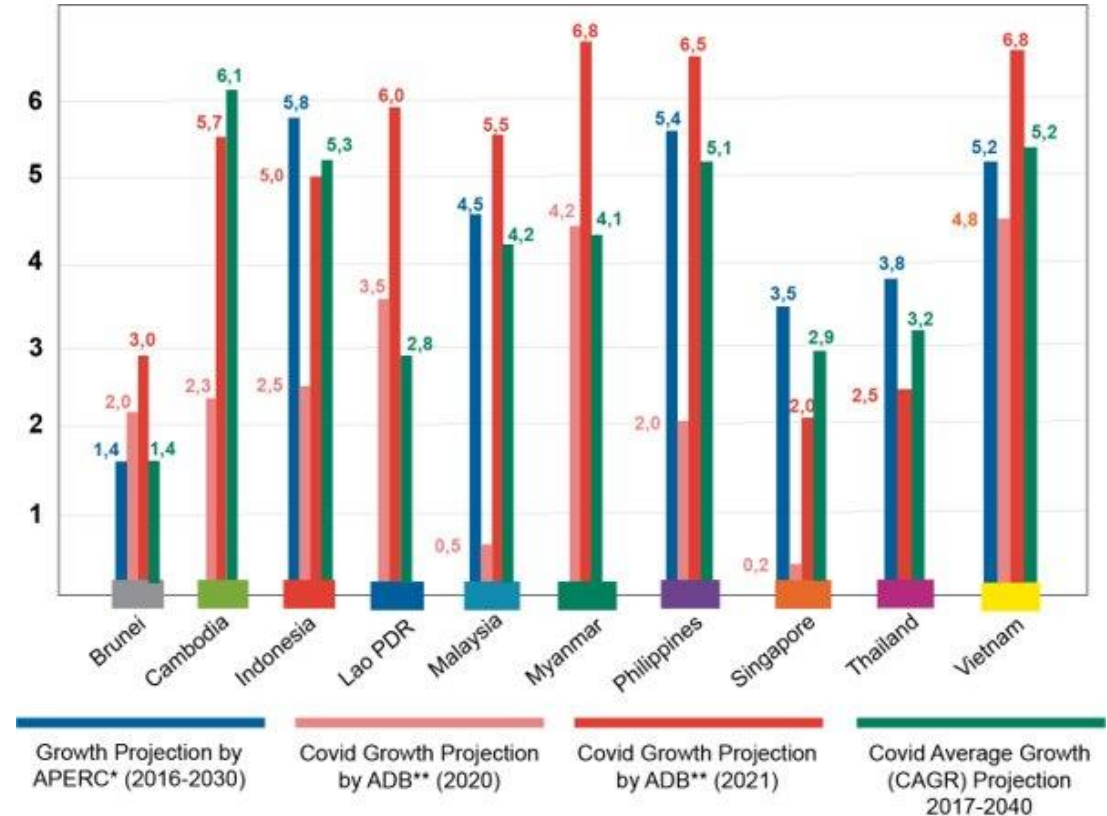


# COVID-19 in ASEAN

| Countries  | Index case(s)                          | Confirmed      | Recovered      | Deaths       | Active        | Tests            |
|--|--|----------------|----------------|--------------|---------------|------------------|
|  <b>Brunei</b>      | 09-Mar Tutong, Tutong District         | 141            | 138            | 3            | 0             | 40,202           |
|  <b>Cambodia</b>    | 27-Jan Sihanoukville                   | 239            | 164            | 0            | 75            | 64,597           |
|  <b>Indonesia</b>   | 02-Mar Kemang, Jakarta                 | 108,376        | 65,907         | 5,131        | 37,338        | 1,506,191        |
|  <b>Laos</b>        | 24-Mar Vientiane, Vientiane Prefecture | 20             | 19             | 0            | 1             | 27,106           |
|  <b>Malaysia</b>    | 25-Jan Sungai Buloh, Selangor          | 8,976          | 8,644          | 125          | 207           | 970,644          |
|  <b>Myanmar</b>     | 23-Mar Yangon                          | 353            | 296            | 6            | 51            | 112,381          |
|  <b>Philippines</b> | 30-Jan Manila, Metro Manila            | 93,354         | 65,178         | 2,023        | 26,153        | 1,497,313        |
|  <b>Singapore</b>  | 23-Jan Sentosa, Southern Islands       | 52,205         | 46,491         | 27           | 5,687         | 1,321,094        |
|  <b>Thailand</b>  | 13-Jan Bangkok, Central Thailand       | 3,310          | 3,125          | 58           | 127           | 717,814          |
|  <b>Vietnam</b>   | 23-Jan Ho Chi Minh City, Southeast     | 546            | 373            | 2            | 171           | 430,000          |
| <b>Total</b>   |  | <b>267,544</b> | <b>190,359</b> | <b>7,375</b> | <b>69,810</b> | <b>6,688,910</b> |

Source:

\* <https://www.worldometers.info/coronavirus/#countries> (31 July 2020)



Source:

\*APERC GDP projection on the APEC Energy Demand & Supply Outlook 7th Edition (2019)

\*Cambodia and Lao PDR's non-covid projection are from IIASA, while Myanmar is from OECD due to them not being in APEC

\*\* COVID-19 projection refers to ADB Asian Development Outlook (ADO) 2020



# Q1 Survey – Covid-19 on Energy

*Public perspective pointed fossil fuels, but RE is to be hit, as well*

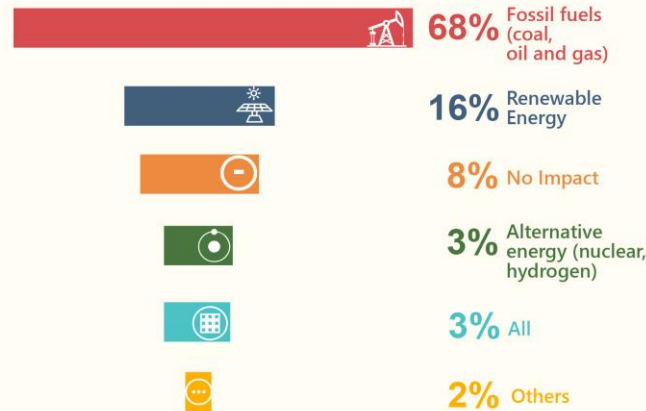


## COVID-19 and Energy

**3** Industry and transportation are the two most energy intensive sectors, and the most impacted

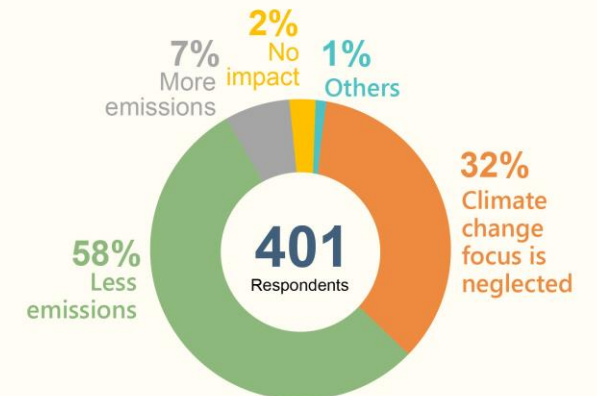


**4** Fossil fuels get impact most, but RE is not immune either



## COVID-19 and Climate Change

**5** Less emissions as economic slowdown, but somehow the public feel that our focus on climate change is also neglected



The Impact of COVID-19 on Energy and Climate Change in ASEAN: ACE Survey

# RE in ASEAN Pre-Covid-19

*Pre-pandemic, the region had been gearing up towards RE acceleration*



LCOE of solar has also dropped down even reaching grid parity in several Member States.



Solar has reached grid parity in the Philippines and Singapore, and soon in Thailand too if the equipment costs can be brought down.



Following revision of the FiT for wind power and release of updated guideline for wind power projects in the Vietnam, there are a total of 7,000 MW of wind power project proposals submitted.



## Vietnam

- Vietnam revises its feed-in-tariff (FiT) incentive scheme for solar early this year. The FiT will be differentiated by regions, higher for cloudy region in the north and lower for sunny region in the south and would also differ depending on the category.



## Thailand

- Thailand has also gotten its hand on the floating solar technology in their dams and reservoir.
- Thailand also begins to plan for recycling plant of solar cell.



## Singapore

- Singapore will have one of the world's largest offshore floating solar system along the Straits of Johor, with capacity of 5 MW which is estimated to operate this year.



## Cambodia

- The RE sector is also increasingly attractive for investors in Cambodia as an outcome of the Kingdom's largest solar energy project (60 MW in Kampong Speu) which will operate this year.

# RE in ASEAN during Covid-19 Q1 2020

## *Supply chain disruption and the postponed RE projects*

*The importance of independency is highlighted*



### Laos

Laos government suspended all hydropower construction throughout the country



### Cambodia

Cambodia postponed two potential hydro projects in March.



### Philippines

Philippines' utility suffers the delay of commissioning 135 MW solar project as the country sources most of the solar PV modules from China



### Malaysia

As the country imposed a nationwide lockdown since mid-March, the palm oil plants shutdown undermines biomass supply



### Thailand

Ministry of Energy is urged to sign a moratorium on Power Purchase Agreements of new power projects in neighbouring countries



### Indonesia

The Indonesian Geothermal Association (INAGA / API) examined the effect of the present COVID-19 crisis and the depreciation of the Indonesian rupiah on geothermal ventures in Indonesia.

# RE in ASEAN during Covid-19 Q1 2020

## Keeping the hopes of renewables alive amid dark times

*Global recession and extremely low oil prices could discourage the clean energy transition agenda due to less competitiveness of RE*

*Despite the black cloud hanging over the RE, several positive actions are observed in ASEAN during the COVID-19 crisis, including social initiatives*



**Viet Nam**

Vietnam planned to launch its second Feed-in-Tariff (FiT) scheme for solar projects



**Malaysia**

Rural community in Malaysia constructed a solar-fueled buggy and water pump

## Shaping the post-pandemic RE industry

*RE sector is believed to be able to create the biggest job opportunities.*

*Governments can provide green stimulus packages for RE markets, such as renewing their investment, easing credit terms in financing RE projects, and reducing cost competitiveness with fossil fuels.*



**ASEAN**

As ASEAN countries with the emerging economies are among the most vulnerable nations, regional cooperation would be necessary



**Malaysia**

Malaysia planned to spend US\$2.9 billion including towards the rooftop solar panels installation, and to invite investments for a 1400 MW solar power project.

# RE in ASEAN during Covid-19 Q2 2020

*RE development was pushed back a little as projects delayed*



150GW of Asia-Pacific renewables 'at risk'



Malaysia postponed the national enforcement of the B20 biodiesel programme rollout



- ✓ Demand for photovoltaic panels dropped from the previous year in the March-April period
- ✓ Government to delay auction of geothermal working areas this year
- ✓ The completion of Batang Toru hydro power would be delayed to 2025
- ✓ Delay of B40 (40% biodiesel blend) and B100 or "green diesel" policy

*The resilient effort of RE amid the new normal roll-out*



Under a US\$300 million loan granted by the ADB to the state-owned PT Geo Dipa Energi (GDE), Indonesia is installing two new geothermal plants



- ✓ Vietnam launched its second Feed-in-Tariff (FiT) scheme for solar projects
- ✓ Vietnam's FiT scheme for wind projects is being considered be extended for another two years until 2021



DOE reported that there will be no suspension on the bioethanol blending program have E10 blend in all gasoline products sold in the country



# RE in ASEAN during Covid-19 Q2 2020

## Countries are urged to not lose sight of the long-term Green Recovery

*While combatting the pandemics, AMS are starting to strategize the recovery plan and ensuring that sustainable pathways are taken, including to keep pursuing RE.*



### Thailand

Thailand plan to spur 30 billion baht for Energy for All scheme.



### Philippines

The Philippines urges to switch to 'resilient' renewables after the pandemic, as Central Bank offers support for energy transition and renewables



### Myanmar

IFC to boost funding for off-grid solar power in Myanmar



### Indonesia

Studies to design rooftop solar-centred recovery scheme called Solar Archipelago is conducted.



### Cambodia

EU will provide \$5.97 million to fund two new projects in Cambodia, "Switch to Solar" and "Promotion of sustainable energy practices in the garment sector in Cambodia".



### ASEAN

South East Asia Clean Energy Facility (SEACEF) gathered \$10 million of fund, with additional \$40 million more in the pipeline.

# “Progressive” Development?



**The Impact of COVID-19 on Energy and Climate Change in ASEAN: ACE Survey**

Affecting fossil fuels the most, but RE is also to be hit.



**SPECIAL PAGE**

**Assessing the Impact of COVID-19 Pandemic on Energy and Climate Change in ASEAN**



**COVID-19 vs ASEAN Energy Sector: Renewables**

**Q1/2020:** “Renewable energy sector is also inevitably hit by this pandemic, **remarkably under the disrupted supply chain and logistic which cause inevitable postponed projects.**

This pandemic creates both, opportunities and threat to RE as target and priorities of government are still on the fence. However, there is an optimism that this pandemic could shine a silver lining on how to progress with the energy transition and shape the RE industries once the economy bounces back.”



**COVID-19 vs ASEAN Energy Sector: Renewables (Q2)**

**Q2/2020:** “Renewable Energy **projects continuously experience inevitable struggles** during the COVID-19 pandemic. However, currently, ASEAN governments see that RE could be an integral part of re-building energy resiliency of the region as the new normal begin. RE shall and will be the driver for ASEAN to look towards green recovery plan, ensuring the economy rise and sustainability are inline. After half-year pandemic hit, there might be a silver lining that this COVID-19 outbreak is giving ASEAN a **chance to re-orient its economy to be greener with renewables being the key solution.**”

# Sneak Peek of H2 2020



## Malaysia

- ✓ Petronas Malaysia signed an agreement to invest in solar energy start-up
- ✓ Hydropower project remains on track amid the challenges during the movement control order



## Viet Nam

- ✓ Planned to shift ~17 GW of planned coal power plants in favor of natural gas and renewables.
- ✓ 5 MWp solar power farm was inaugurated on schedule despite multiple challenges.



## Philippines

The rise of prosumers lead to solar installation in Filipino household

*Global financing is become tighten during the Covid-19 pandemic, while local banks are reluctant to finance renewable energy capacity and generation projects*

*Government could provide incentives for financial institutions and investors to finance renewable energy projects, which could become part of the stimulus package for economic recovery.*

# Special Page on COVID-19

## Related Analysis



**ASEAN Energy Development: Pre COVID-19 Status and Progress**  
2020 is incredibly tough for ASEAN energy development as Covid-19 brings unprecedented challenges to the...



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ACCEPT initiated an In-House Sharing Session, discussing five different topics under a common theme regarding the COVID-19 pandemic and climate crisis via online...



**COVID-19 and the Energy Sector: Policy Perspectives**  
The Asia Clean Energy Forum (ACEF) of the Asia Development Bank (ADB) is one of Asia's leading clean energy events and is held each June. ACEF connects...



**Building Resilience to Pandemic With Residential Energy Efficiency and Conservation**  
It has been half a year since COVID-19 was first reported in December 2019, followed by the World Health...



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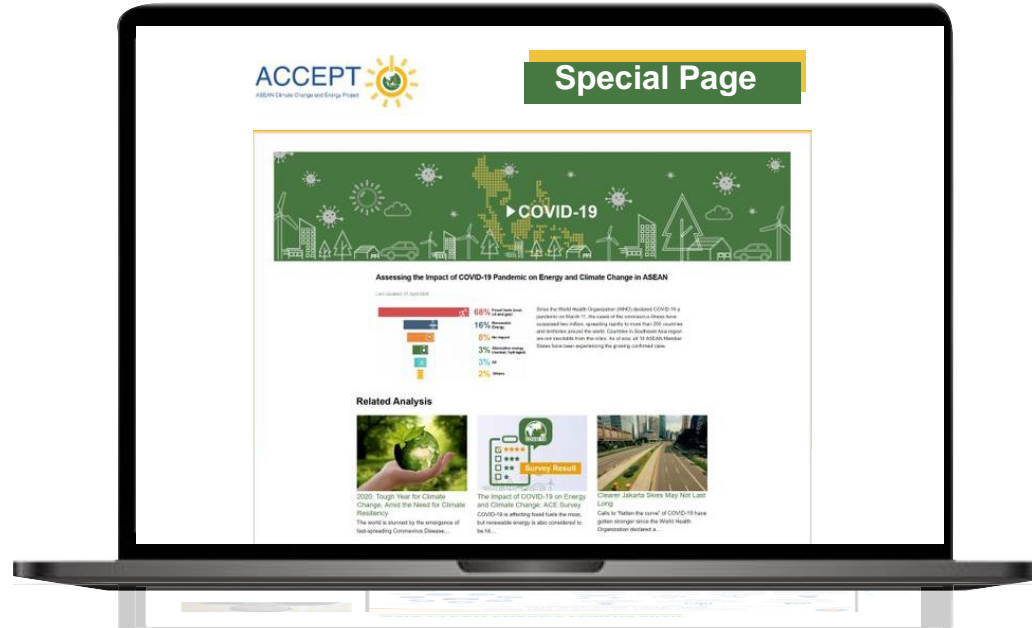
## Energy and Climate Policy Tracker on COVID-19

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## ASEAN

### Related News

- 23 June – In post-Covid Asia, countries should develop their own renewable energy capabilities
- 22 June – Embracing renewables in ASEAN countries for post COVID-19
- 15 June – Standing tall: How green buildings are adapting to the post-Covid era
- 5 June – UK seeks to boost ties with Southeast Asia through ASEAN
- 15 May – PH reports significant improvement in air quality
- 13 May – Post-pandemic stimulus may slow end of coal in Southeast Asia and Japan
- 11 May – COVID-19 will not slow Southeast Asia's shift from coal to renewables
- 10 May – Air pollution clearing up in Southeast Asia
- 7 May – Air pollution clears in some cities in SE Asia during lockdown, but not all, study finds
- 6 May – KrisEnergy reviewing commerciality of oilfield operations offshore Thailand
- 5 May – Covid-19 offers preview of impact of environmental threats
- 2 May – Global oil price crash leaves ASEAN economies staring down the barrel
- 27 April – Don't Waste The Pandemic Response
- 24 April – Coronavirus means cheap oil isn't good news for energy-hungry Southeast Asia
- 24 April – Lower oil prices hurting China and Southeast Asia
- 22 April – COVID-19: 150GW of Asia-Pacific renewables 'at risk'
- 22 April – Reduce risk of future epidemics by improving climate change commitments now, MPs warn



## Indonesia

### Key Policy Responses

As a result of the coronavirus pandemic, Indonesia took another step back toward a clean energy economy due to fossil fuel subsidies and hampered clean power plant projects such as geothermal. Indonesia introduces a domestic coal price of \$20 below market price in January and set a subsidised fuel quota at 26.87 million kiloliters (mL) as a government position to protect the people's purchasing power and ensure the business community.

### Related News

- 16 June – Indonesia pushes back target for palm oil fuel refinery to 2026
- 11 June – SKK Migas lowers upstream oil and gas investment target this year
- 8 June – Energy ministry rejects miners' request for relaxation on coal royalties
- 1 June – Govt Should Review Energy Prices: Apindo
- 29 May – Sustainable development crucial in Indonesia's COVID-19 recovery, experts say
- 26 May – 11 companies sign deals to buy gas at lower prices



**COVID-19 vs ASEAN Energy Sector: Electricity**

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# Thank You





## Launching Talk



# Q & A



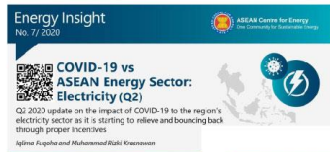
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**Energy Insight**  
No. 7/2020

**COVID-19 vs ASEAN Energy Sector: Electricity (Q2)**  
Q2 2020 update on the impact of COVID-19 to the region's electricity sector as it is starting to relieve and bouncing back through proper procedures.

*Agilina Puspita and Muhammad Rizki Kresnawan*

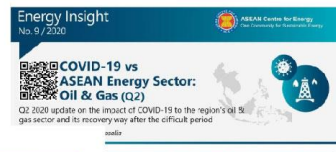
This edition is part of the related analysis on the impact of Covid-19 on energy in ASEAN. Further detail, please access: <https://acept.aeenergycentre.org/insight-19/>.

To update the readers on how the COVID-19 pandemic hits the energy sector, and how the recovery may affect the energy sector in ASEAN, ASEAN Centre for Energy (ACE) release several energy insights highlighting the impact of COVID-19 in the ASEAN Energy Sector from our previous ones. In this insight, we highlight the impact of COVID-19 on the ASEAN Electricity sector.

Accounting for more than 11 million people infected, including that of whom have not yet been reported by WHO, the ASEAN-19 crisis, worsened and the recovery looks unclear amidst uncertain globally. Currently, ASEAN region having more than 170 thousand confirmed cases by 8 July 2020, several countries already recorded slight high new cases or even nearly zero for the past weeks. Meanwhile, in the last few countries, Indonesia, the Philippines, and Singapore, are still keeping effort to flatten the curve.

Since the announcement of the COVID-19 pandemic, ASEAN-19 countries have taken the most restrictive policies and began to resume business activities since June. Despite continuous case as a balance as a technical and the Philippines, the government decided to bring the new normal after the recovery starts slightly in the first quarter when bringing the transportation to the regular plan may not be the severely affected sectors with various scenarios.

In contrast to energy insights, we discussed the most advanced demand, shared and several power projects halted due to disrupted supply chain at construction, production, investment, and other therapeutic necessities. The ASEAN governments must provide more stimulus because the sufficient investment in machinery power and hydrocarbon power are hydrocarbon challenges.



**Energy Insight**  
No. 9/2020

**COVID-19 vs ASEAN Energy Sector: Oil & Gas (Q2)**  
Q2 2020 update on the impact of COVID-19 to the region's oil & gas sector and its recovery way after the difficult period.

*Nashidh Shani and Zulfariz Tamsil*

This edition is part of the related analysis on the impact of Covid-19 on energy in ASEAN. Further detail, please access: <https://acept.aeenergycentre.org/insight-19/>.

To update the readers on how the COVID-19 pandemic hits the energy sector, and how the recovery may affect the energy sector in ASEAN, ASEAN Centre for Energy (ACE) release several energy insights highlighting the impact of COVID-19 in the ASEAN Energy Sector from our previous ones. In this insight, we highlight the impact of COVID-19 on the ASEAN Renewable Energy sector.

Entering the second half of 2020, Covid-19 keeps haunting the economic activity in the region, along with differing level of severity. Some countries already experienced alternative infection rates, while others still struggle to contain the spread of the high infectious disease.

Against that backdrop, ASEAN needs to put its 2020 renewable target in total primary energy supply within the framework of post-pandemic recovery. As in 2017, the renewables stood at 51.6% or 20% of energy supply mix, which around 166 GW of capacity is required to reach the regional target by the deadline of 2025. To keep that regional target in sight, a well-organized green recovery should be rolled-out, aiming at both economic recovery and sustainability.

RE development was pushed back a little as projects delayed.

The grip of covid-19 pandemic on the energy sector, including renewables, was still strong in the Q2 2020. In Indonesia, the demand for photovoltaic panels, inverters, attached to the economic slow-down, forcing consumers to refrain from non-essential spending. Commercial PV demand, based on its decreased by up to 70 percent in the March-April period from previous year. Indonesian government also decided to delay its Government Working Area (GWA) management office, stated to be postponed to later.

# Energy Insight Series

## COVID-19 vs ASEAN Energy Sector

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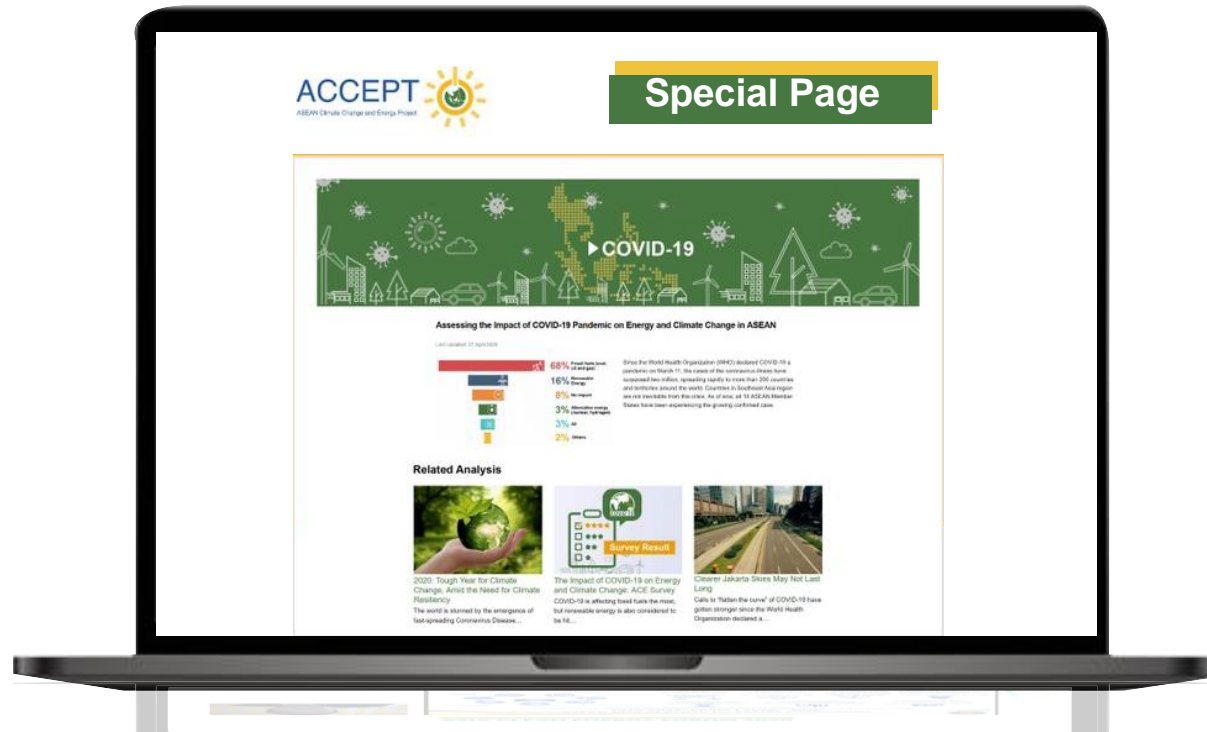




Launching Talk



# Special Page on COVID-19



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