

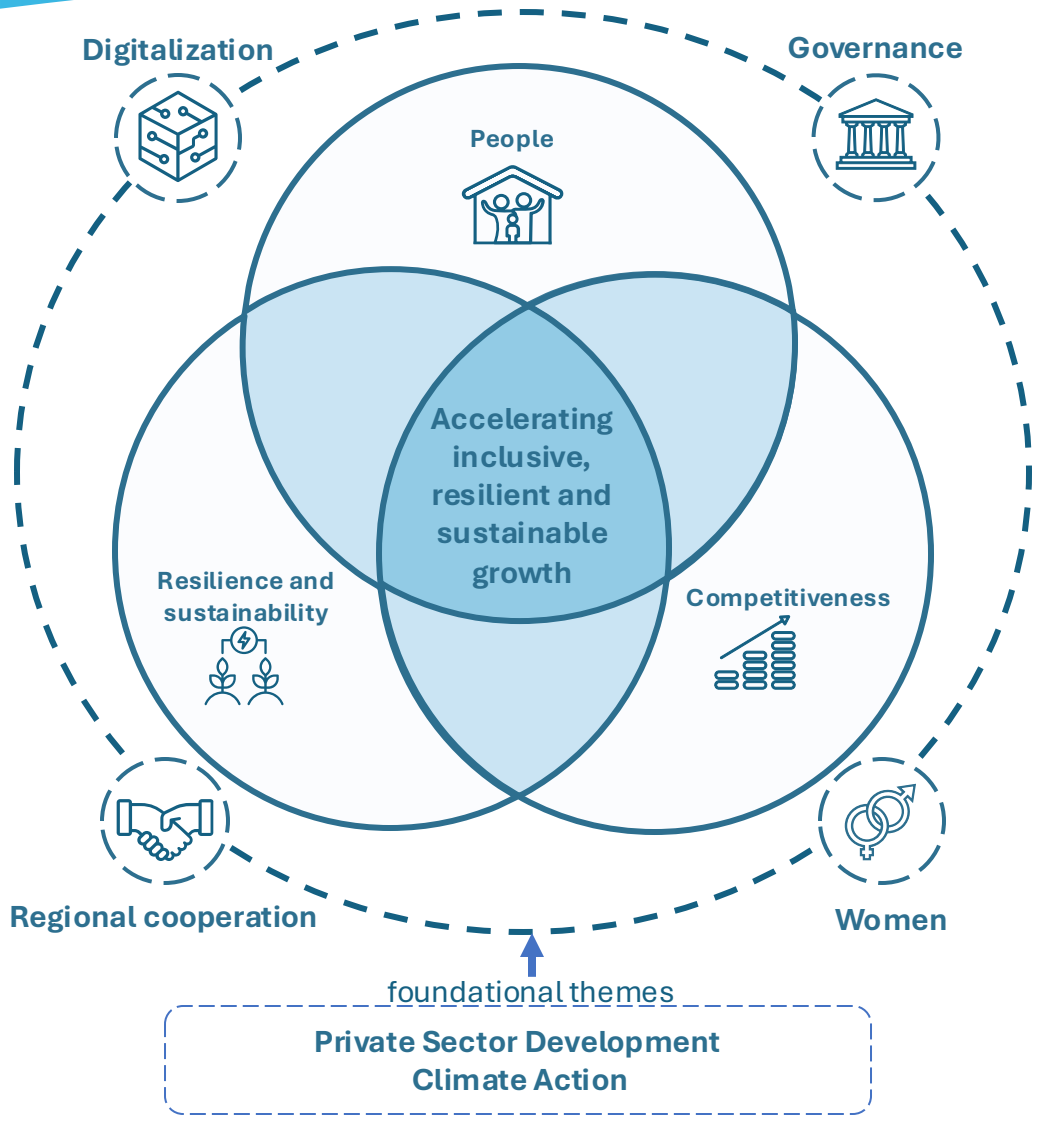
Webinar on Business Opportunities in Indonesia

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Solving Complex Challenges Together

Strategic Pathways for CPS 2025-2029: To accelerate inclusive, resilient, and sustainable growth by focusing on the nexus of:





Investing in People

- Strengthening labor force skills.
- Fortifying health care and nutrition services.
- Consolidating social protection.

Advancing Economic Competitiveness

- Strengthening, trade, investment, and business climate.
- Reforming state-owned enterprises.
- Deepening financial markets and inclusion.
- Bolstering connectivity.
- Mobilizing domestic resources.

Ensuring Resilience and Sustainability

- Improving agriculture production and food security.
- Strengthening water security and mitigating flood risk.
- Expanding clean and secure renewable energy.
- Cultivating blue and circular economy and green cities.

Cross cutting priorities for CPS 2025-2029



Women & Inclusion

- Maternal and child health and reinforced social protection for vulnerable populations.
- Female labor force participation and skills for green industries.
- Support for women-led enterprises and financial inclusion.
- Universal and inclusive design of infrastructure (especially transportation).

Digitalization

- Digitalizing government services for access and transparency (e.g., health and social protection).
- Greater use of digital and innovative technologies for risk informed project design and delivery (e.g., digital twins).
- Expansion of green information and communication technology infrastructure and enabling frameworks (e.g., cyber security and skills).

Governance

- Public financial management at national and subnational level.
- Strengthening of civil service.
- Harmonization of national and local planning and strategies.
- Institutional strengthening and capacity building.

Regional cooperation

- Regional public goods e.g., ocean health, biodiversity, air quality, and pandemic preparedness.
- Financial cooperation for green and sustainable finance.
- Trade integration for resilient value chains.
- Connectivity infrastructure e.g., power and transport.

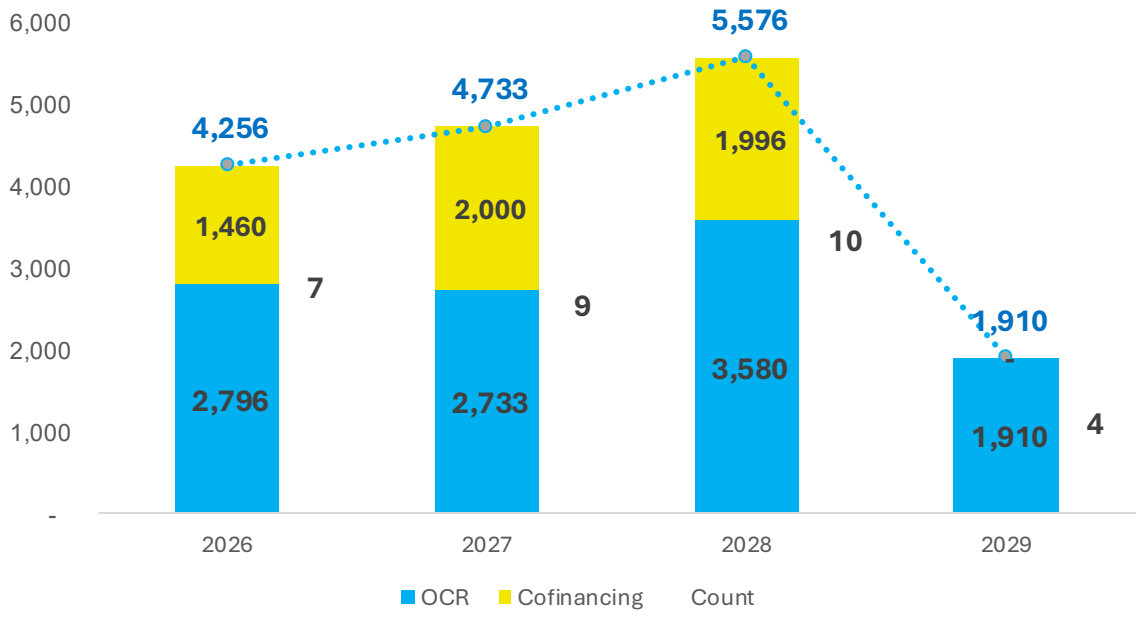
Indicative Lending Pipeline2026 – 2029 –
Subject to confirmation by the Government of Indonesia

Sovereign Lending Pipeline 2026–2029

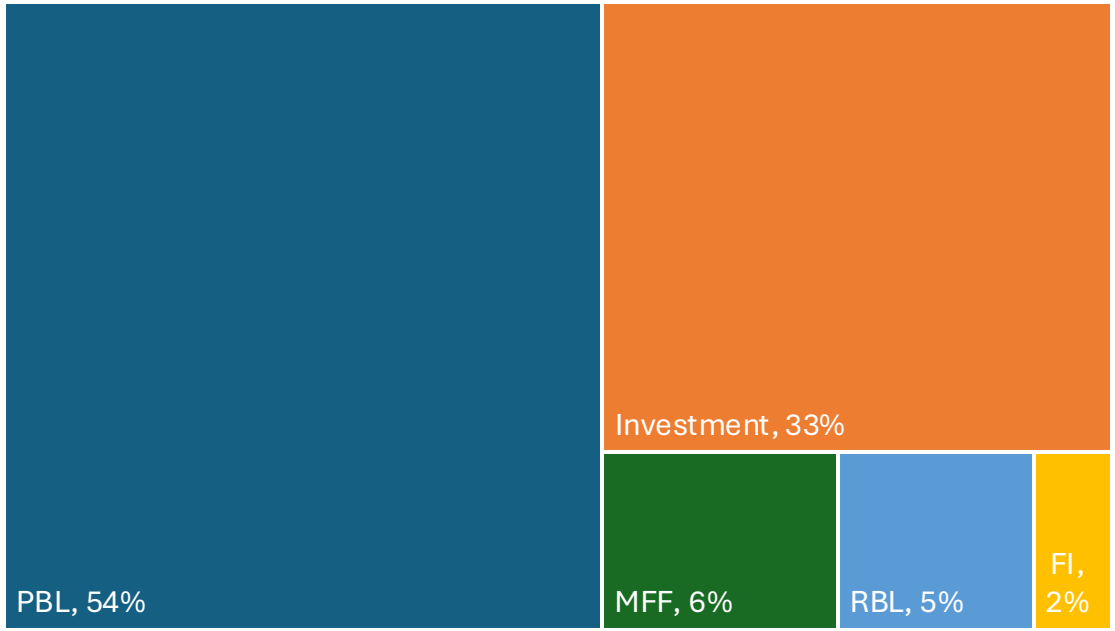
Total indicative pipeline of **firm** projects and programs for 2026-2029 includes **30** initiatives with a total volume of **$16.5 billion** ($11.0 billion ADB, $5.5 billion cofinancing) indicating high demand and strong partnership.



Annual Sovereign Lending Amount and No. of Project (firm projects, $ million, Count)



Modality Composition (firm projects, exclude cofinancing)



Sector Share by amount (firm projects, exclude cofinancing)



Indicative 2026 Pipeline



2026 FIRM PROJECTS (7 Operations), $2,796M

Reducing Marine Debris, SP2
AFNR | $500M + $647M cofinancing

Affordable & Sustainable Energy Transition, SP2
ENE | $500M + $650M cofinancing

Financial Market Deepening Program, SP1
FIN | $500M

Accelerating Decentralization for Local Governance, SP1
PSMG | $500M

Regional Water Supply Project
WUD | $372M

Development & Rehabilitation of Irrigation Project
AFNR | $400M

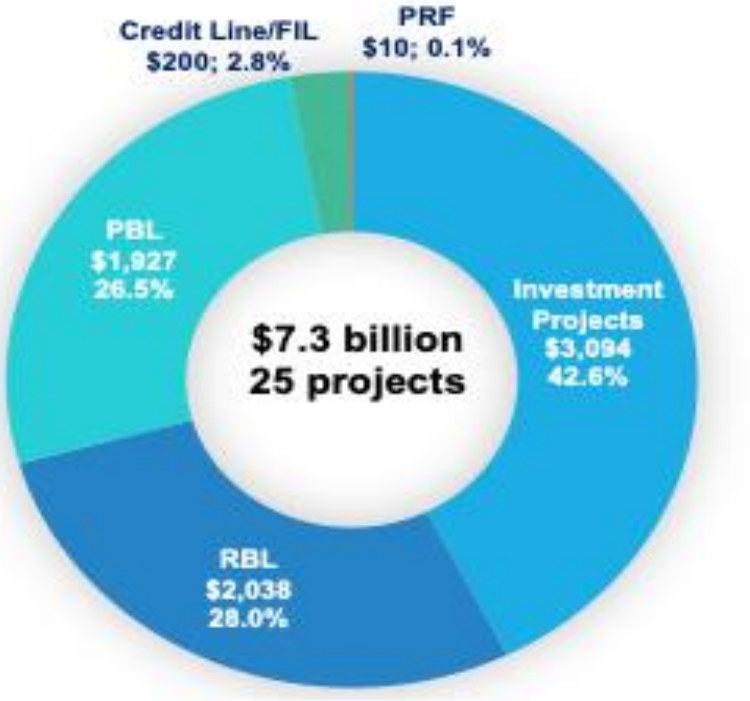
2026 STANDBY PROJECT (1 Operation), $500M

State-Owned Enterprises Reform, SP2
PSMG | $500M

Portfolio Share by Modality and Sector



Portfolio Share by Modality, as of 31 December 2025
($ million)



Source: PPFD Data for the annual portfolio performance report (APPR)

Sectoral Distribution, as of 31 December 2025

	Sector	Net Amount (USD Million)	% Share	# Project
1	Energy (ENE)	2,185.26	30%	5
2	Public Sector Management and Governance (PSMG)	1,533.81	21%	4
3	Health (HLT)	1,079.52	15%	2
4	Agriculture, Food, and Natural Resources (AFNR)	699.51	10%	5
5	Finance (FIN)	683.27	9%	3
6	Education (EDU)	408.74	6%	4
7	Water and Urban Development (WUD)	395.77	5%	1
8	Transport (TRA)	282.78	4%	1
	Total	**7,268.66**	**100%**	**25**

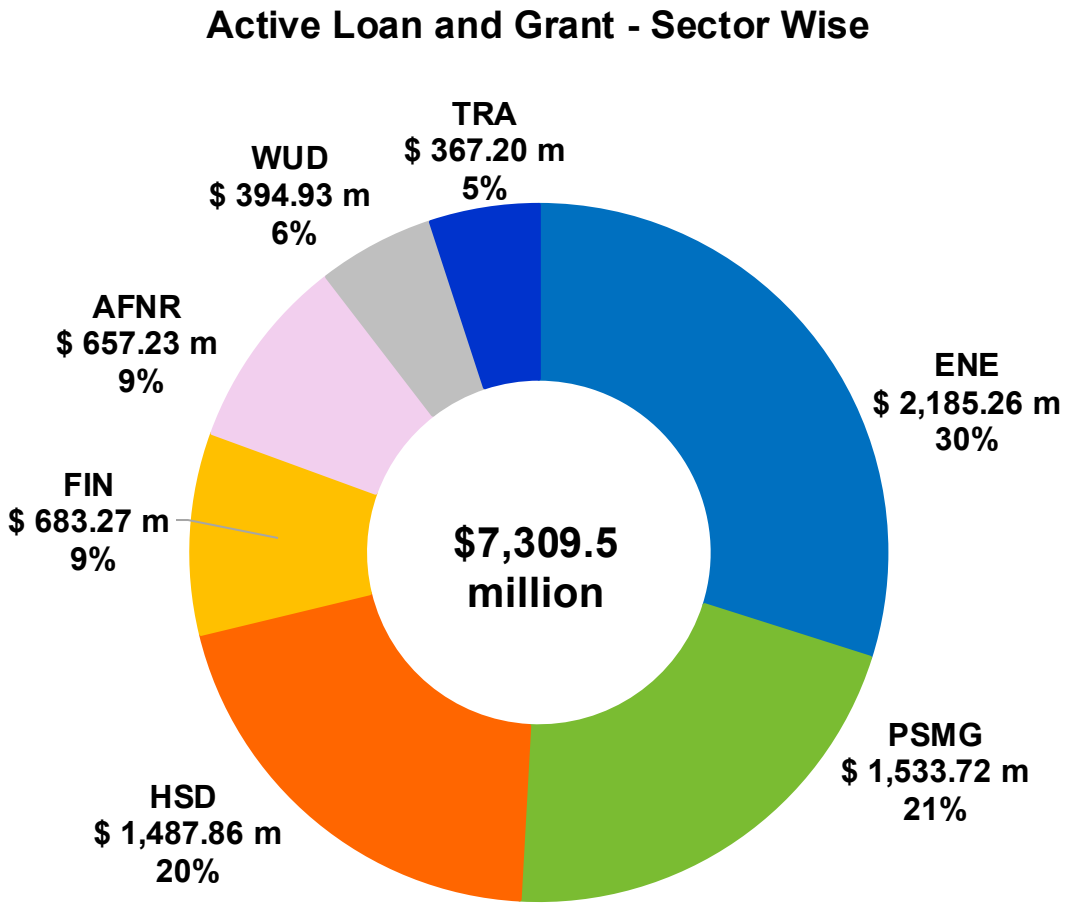
[1] Excluding cofinancing amount for L8453-INO (IFAD): HDDAP ($43.36 million) under AFNR sector.

SD1-Energy (ENE) Sector

Overview



- **2 active investment projects and 3 RBLs** under Energy (ENE) Sector, with total of **$2,185.26 million**.
- ENE contributes the **highest share** of active projects in Indonesia, with **30%** of ADB's active portfolio.



Source of data: ADB Operations Dashboard as of 31 December 2025

Geothermal Power Generation Project

EA	PT Geo Dipa Energi (Persero)
Total Amount	$345.0 million (including support from Clean Technology Fund $35 million, and Japan Fund for the Joint Crediting Mechanism $10 million)
Approval Date	28 May 2020
Effective Date	21 September 2020
Closing Date	30 June 2028
Location	Wonosobo (Dieng), Central Java
Project Description	The project supports the expansion of Indonesia's geothermal generating capacity to strengthen the sustainability, resiliency, and sufficiency of the electricity system, aligning with SDG 7 on access to affordable, reliable, sustainable energy and SDG 13 on urgent climate action. It enables GDE, a state-owned geothermal company, to commission an additional 110 megawatts (MW) of capacity—55 MW at the Dieng geothermal field in Central Java and 55 MW at the Patuha geothermal field in West Java.
Outputs	1. Geothermal power plants constructed and commissioned 2. Institutional capacity of GDE strengthened 3. Community development program enhanced

Geothermal Power Generation Project – Second Additional Financing

EA	PT Geo Dipa Energi (Persero)
Total Amount	$180.0 million
Approval Date	30 October 2025
Effective Date	
Closing Date	30 June 2028
Location	Bandung Regency, West Java

Accelerating Indonesia's Clean Energy Transition Program – Phase 1 (RBL)

EA	PT PLN (Persero)
Total Amount	$593.0 million (including funds from GEAPP Energy Access and Transition Trust Fund, ASEAN Infrastructure Fund, European Union-ASEAN Catalytic Green Finance Facility Trust Fund, and United Kingdom-ASEAN Catalytic Green Finance Facility Trust Fund)
Approval Date	18 November 2025
Effective Date	
Closing Date	31 December 2031
Location	Nationwide
Project Description	Indonesia's clean energy transition program—supported by ADB and partners—helps the government expand reliable, low-carbon power in line with its 2045 high-income vision by scaling solar and wind generation, strengthening the grid, and boosting PLN's institutional capacity. The program enables at least 3,000 GWh of new renewable supply, major grid upgrades, and workforce development, including 1,950 trained staff and 30% women in renewable-energy roles. With strong safeguards and private-sector participation, it will help Indonesia avoid over 2.5 million tons of CO_2 annually and build a foundation for long-term energy security and regional power-grid integration.
Outputs	1. Transition to renewable clean electricity supply facilitated. 2. Power grid infrastructure for renewable energy integration strengthened. 3. Institutional capacity to manage an energy transition enhanced.

Energy pipeline



- **Strong focus on renewable energy**, particularly **geothermal projects** included in the pipeline, alongside selective investments to support system stability and reliability.
- **Geothermal projects are primarily concentrated in Sumatra**, specifically in known geothermal development areas: **Gunung Tiga (Ulu Belu area, Sumatra)**
- Focus on grid strengthening, energy security, and system flexibility, to support renewable energy integration and enhance system resilience.

Ongoing Discussions



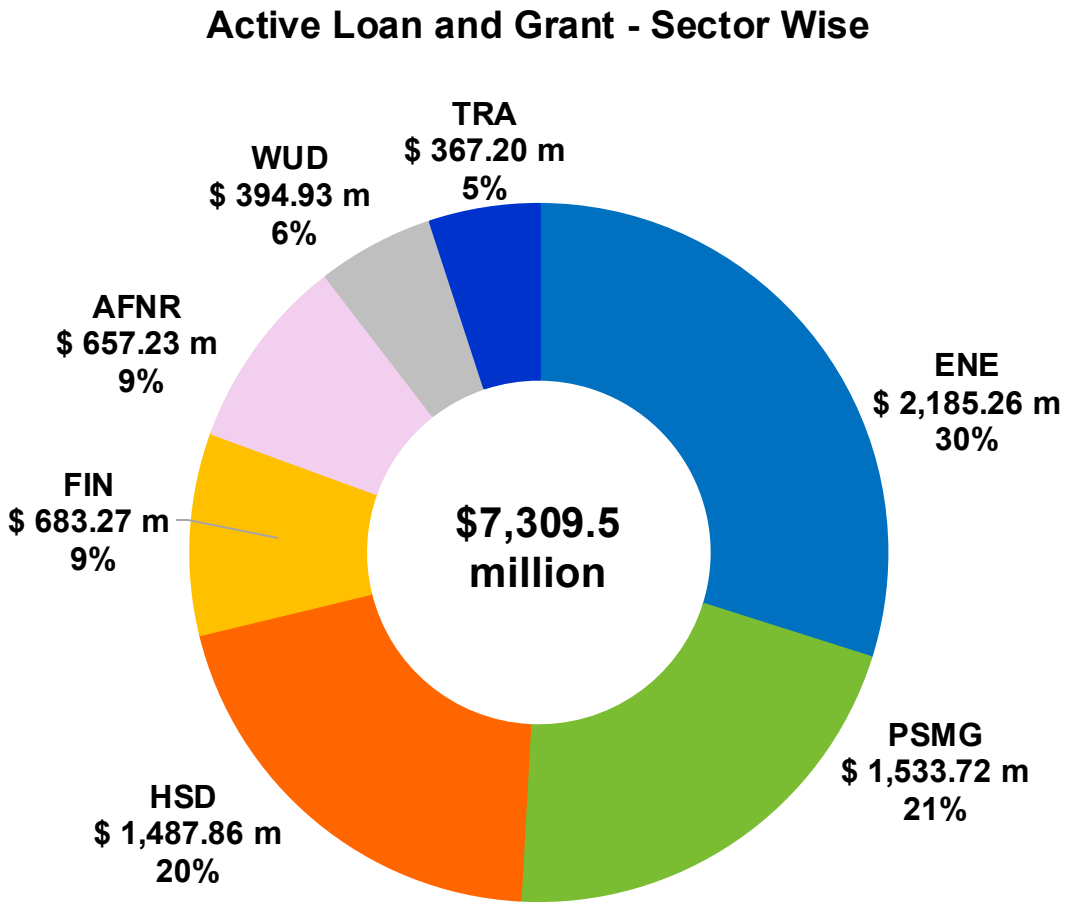
- **Sulawesi**: Development of energy corridors to support regional power system expansion and integration.
- **Java–Sumatra**: Strengthening cross-island interconnection to enhance overall system reliability and power transfer capacity.
- **Kalimantan**: Expansion of backbone transmission infrastructure to improve grid connectivity.
- **Sumatra (including western and surrounding areas)**: Transmission and interconnection investments to support energy security and network efficiency.
- **Nationwide / multi-regional**: Programmatic and system-level interventions to accelerate clean energy transition and improve grid flexibility.

SD2-Agriculture, Food, Nature, Rural Development (AFNR) Sector

Overview



- **5 active projects** under Agriculture, Food, Nature, Rural Development (AFNR) Sector, with total of **$657.23 million**.
- AFNR contributes **9%** of the total ADB active portfolio.



Source of data: ADB Operations Dashboard as of 31 December 2025

Flood Management in North Java Project (previously Enhanced Water Security Investment Project)



EA	Ministry of Public Works
Total Amount	$242.2 million (including support from UK-ACGFTF $10.0 million)
Approval Date	5 December 2023
Effective Date	9 February 2024
Closing Date	30 June 2029
Location	Semarang, Central Java
Project Description	The Flood Management in North Java Project strengthens climate resilience in the Cimanuk–Cisanggarung (CimanCis) and Seluna river basin territories. It reduces flood risks for 485,000 people, including 200,000 poor and vulnerable residents, as well as for agricultural land and assets along Java's rapidly urbanizing northern coast. The project operationalizes flood risk management by (i) establishing earth observation and early warning systems, (ii) improving regional planning and land zoning, and (iii) enhancing the climate resilience and maintenance of flood protection infrastructure.
Outputs	1. Planning for FRM enhanced 2. Land management improved and flood infrastructure upgraded 3. Capacity for CBFRM enhanced 4. Policy, coordination, and capacity at the national level improved

ADB

Emergency Assistance for Rehabilitation and Reconstruction



EA	Ministry of Public Works
Total Amount	$181.3 million
Approval Date	26 June 2019
Effective Date	4 November 2019
Closing Date	30 September 2024
Location	Palu, Central Sulawesi
Project Description	The Emergency Assistance for Rehabilitation and Reconstruction (EARR) supports the Government of Indonesia in rebuilding critical infrastructure in Central Sulawesi, following the 2018 earthquake, tsunami, landslides, and liquefaction. Aligned with the Master Plan for Recovery and Reconstruction and responding to the government's request, the project applies a One ADB Team approach to deliver a faster, integrated recovery. It aligns with ADB's Country Partnership Strategy (2016–2019) and Strategy 2030 priorities, including poverty reduction, gender equality, and rural development.
Outputs	1. Human settlement infrastructure constructed, rehabilitated, and upgraded 2. Water resource infrastructure constructed, rehabilitated, and upgraded 3. Ports rehabilitated and reconstructed 4. Airport rehabilitated and reconstructed

ADB

Horticulture Development in Dryland Areas Sector Project



EA	Ministry of Agriculture
Total Amount	$133.9 million (including support from IFAD)
Approval Date	21 August 2023
Effective Date	4 December 2023
Closing Date	30 June 2029
Location	Buleleng, **Bali**; Batang and Wonosobo, **Central Java**; Gresik, Lumajang, and Sumenep, East Java; Ende, Flores; Dairi, Karo, and Papak Barat, North Sumatra; Enrekang and Gowa, South Sulawesi; Sumedang, West Java
Project Description	The project supports the Ministry of Agriculture in optimizing underutilized dry land to promote modern, profitable, and climate-resilient agriculture. It contributes to COVID-19 recovery by revitalizing rural economies and strengthening smallholder entrepreneurship. Through an integrated cluster approach, the project enhances productivity and profitability by improving value addition, modern farming adoption, irrigation reliability, market access, and land utilization. It also promotes climate-smart agriculture and leverages digital technologies to expand farmers' access to information and innovation.
Outputs	1. Farm inputs, land, water, infrastructure and services improved 2. Climate adaptive on-farm practices introduced 3. Value chain systems in horticulture clusters strengthened 4. Institutional capacity for horticulture development increased

ADB

Infrastructure Improvement for Shrimp Aquaculture Project



EA	Ministry of Marine Affairs and Fisheries
Total Amount	$92.1 million
Approval Date	14 December 2022
Effective Date	22 January 2023
Closing Date	30 June 2028
Location	East Java
Project Description	The project supports the Ministry of Marine Affairs and Fisheries in promoting sustainable shrimp aquaculture to enhance productivity, quality, profitability, and environmental sustainability among smallholder farmers. Implemented across seven provinces, it improves access to quality inputs, sustainable infrastructure, and stronger value chains. The project contributes to increasing the fisheries sector's role in the national economy by fostering climate-adaptive practices, improving production and post-harvest systems, and strengthening the shrimp supply chain.
Outputs	1. Quality and sustainability of inputs for shrimp production increased 2. Sustainable and climate adaptive aquaculture infrastructure and services developed 3. Shrimp aquaculture supply chain strengthened

Integrated Fishing Ports and International Fish Markets - Phase 2 Preparation Project



EA	Ministry of Marine Affairs and Fisheries
Total Amount	$9.9 million
Approval Date	1 December 2023
Effective Date	21 February 2024
Closing Date	31 August 2026
Location	Nunukan, North Kalimantan & Banyumas, Central Java
Project Description	The Project Readiness Financing (PRF) supports the Directorate General of Capture Fisheries under the Ministry of Marine Affairs and Fisheries in preparing the Integrated Fishing Ports and International Fish Markets Phase 2 Project. It finances the preparation of eco-fishing port master plans, feasibility studies, engineering designs, safeguards, and bidding documents, and provides procurement support to ensure a smooth transition to implementation and faster project startup.
Outputs	1. Master plans, detailed feasibility studies, detailed engineering designs, and procurement support completed. 2. Environmental and social safeguard requirements complied with. 3. Pre-implementation project management and institutional capacity improved.

Development and Rehabilitation of Irrigation Project



Impact

Rice production in project areas for supporting economic growth and nation's autonomy strengthened.

Outcome

Performance and sustainability of irrigation services improved.

Outputs

Output 1: Efficient and climate-resilient irrigation systems developed and modernized

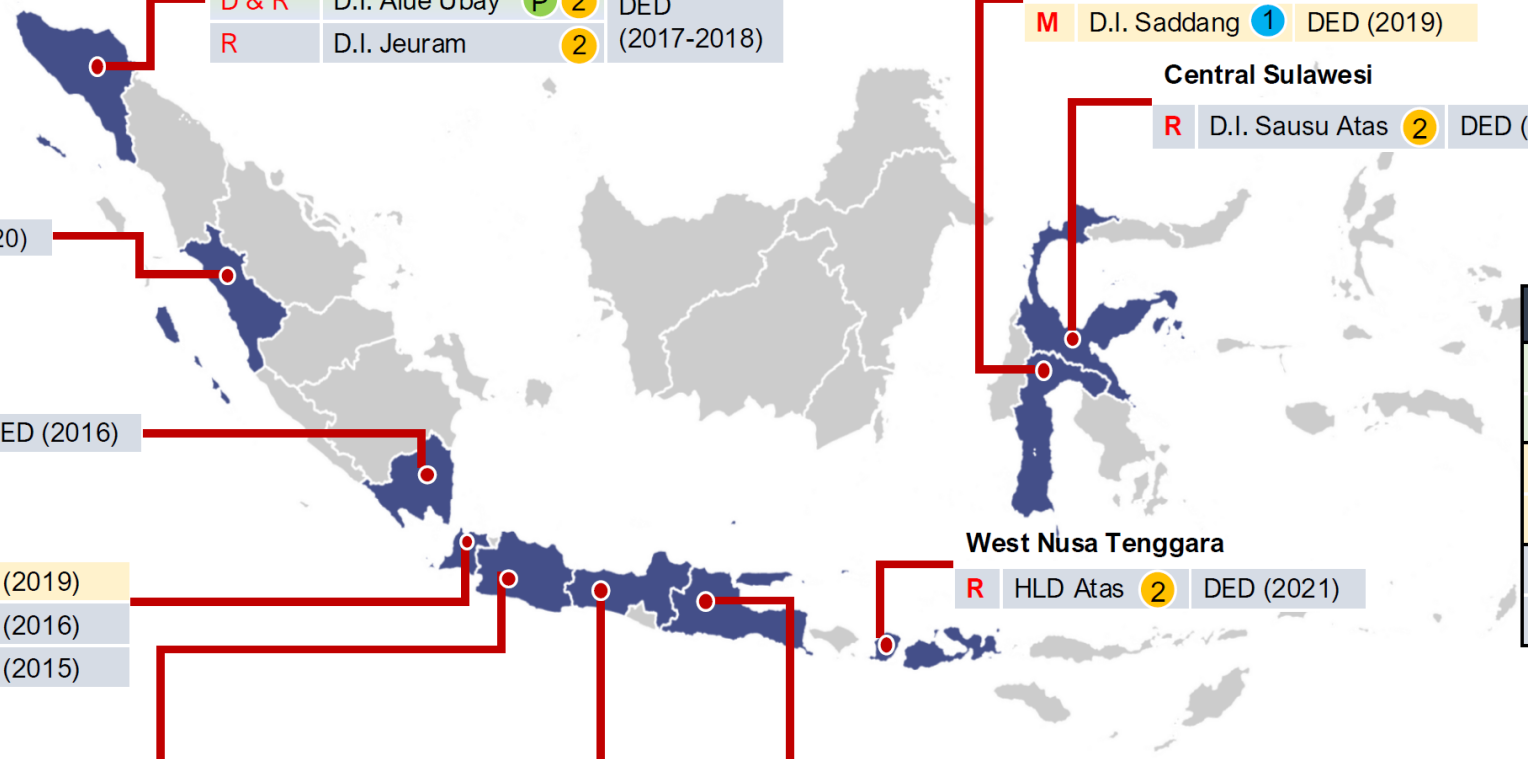
- Improve 18 irrigation schemes (1 with service area expansion, 17 with existing areas) with climate-resilient measures and basin approach.
- Modernize 4 out of 18 irrigation schemes by installing and operationalizing real-time monitoring and control systems for efficient water allocation and management.

Output 2: Irrigation systems management improved and technical innovations in the irrigation sector promoted

- Strengthen irrigation management by introducing irrigation service agreements, enhancing monitoring, and O&M training and certification programs.
- Upgrade two irrigation-related technical implementation units to serve as center of excellence and promote innovations

ADB

Project Locations



Aceh

D & R	D.I. Alue Ubay	P	2	DED (2017-2018)
R	D.I. Jeuram		2	

South Sulawesi

M	D.I. Saddang	1	DED (2019)

Central Sulawesi

R	D.I. Sausu Atas	2	DED (2015)

West Sumatera

R	D.I. Panti Rao	1	DED (2020)

Lampung

R	D.I. Way Rarem	P	2	DED (2016)

Banten

M	D.I. Cisadane		2	DED (2019)
R	D.I. Ciujung	P	2	DED (2016)
R	D.I. Cidurian		2	DED (2015)

West Nusa Tenggara

R	HLD Atas	2	DED (2021)

19 D. I.	93.870 Ha
Development (D)	
1 D.I.	1.311 Ha
Modernization (M)	
4 D.I.	35.338 Ha
Rehabilitation (R)	
14 D.I.	57.221 Ha

NOTES:
- 1 Batch I
- 2 Batch II
- P Premium Irrigation

West Java

Improvement of Technical Implementation Unit

- Irrigation Technical Implementation Unit in Bekasi City
- Hydraulics and Water Geotechnics Technical Implementation Unit in Bandung City

Central Java

M	D.I. Waduk Wadaslintang	P	1	DED (2021&2022)
R	D.I. Waduk Gunung Rowo	P	1	DED (2019)
R	D.I. Sragi		1	DED (2019)
R	D.I. Singomerto		2	DED (2018)
R	D.I. Tajum		2	DED (2016)

East Java

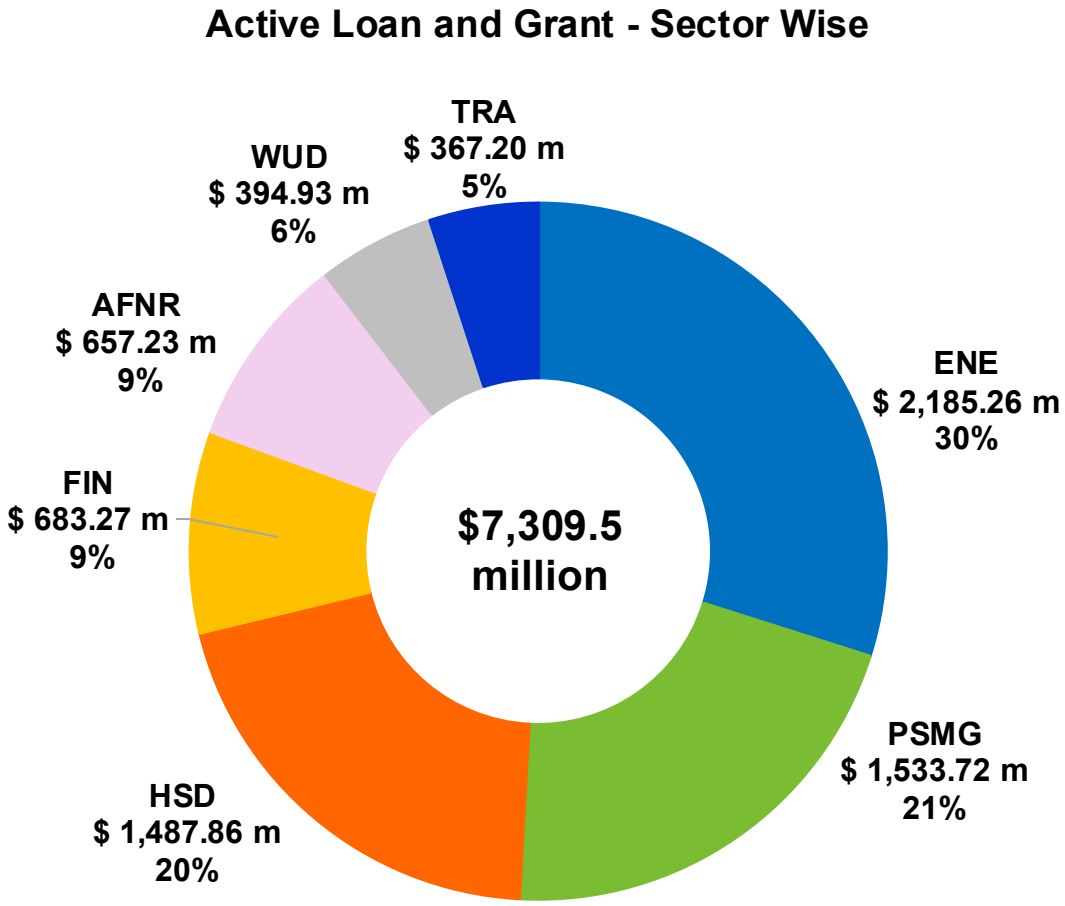
M	D.I. Lodoyo		2	DED (2017)
R	D.I. Bedadung		2	DED (2011)
R	D.I. Asin Bawah	P	2	DED (2021)

Human and Social Development (HSD) Sector

Overview



- **5 active investment projects and 1 RBL** under Human and Social Development (HSD) Sector, with total of **$1,487.86 million** – 3 projects under education and 2 projects under health
- HSD contributes the **third-highest share** of active projects in Indonesia, with **20%** of ADB's active portfolio.



Source of data: ADB Operations Dashboard as of 31 December 2025

Promoting Research and Innovation through Modern and Efficient Science and Technology Parks Project



EA	Ministry of Higher Education, Science, and Technology
Total Amount	$134.4 million (including support from UK-ACGFTF)
Approval Date	8 December 2022
Effective Date	23 January 2023
Closing Date	30 June 2028
Location	Bandung, West Jave; Bogor, West Java; Depok, West Java; Yogyakarta, Yogyakarta Special Region
Project Description	The project supports Indonesia's strategy to commercialize R&D and boost start-up incubation at four science and technology parks (STPs) by upgrading facilities, providing grants, and strengthening staff and researcher capacity. STP development aligns with Presidential Regulation No. 18 of 2020 and RPJMN 2020–2024, prioritizing five universities: IPB, ITB, Gadjah Mada, University of Indonesia, and ITS. HEIs, government agencies, and the private sector conduct R&D, with large public universities managing funds and operating STPs to support research, education, community service, and commercialization.
Outputs	1. Facilities for research and development and innovation at four science and technology parks upgraded 2. The four science and technology parks research and development administration, partnerships, and start-up incubation strengthened 3. Capacity of the four science and technology parks and the Ministry of Education, Culture, Research and Technology strengthened

Promoting Research and Innovation through Modern and Efficient Science and Technology Parks Project (Additonal Financing)

EA	Ministry of Higher Education, Science, and Technology
Total Amount	$5.0 million (support from CTF)
Approval Date	24 November 2025
Effective Date	19 January 2026
Closing Date	30 June 2029
Location	Bandung, West Jave; Bogor, West Java; Depok, West Java; Yogyakarta, Yogyakarta Special Region

Primary Healthcare and Public Health Laboratories Upgrading and Strengthening Project



EA	Ministry of Health
Total Amount	$696.0 million
Approval Date	11 December 2023
Effective Date	7 March 2024
Closing Date	30 June 2029
Location	Nationwide
Project Description	The project assists the Ministry of Health in strengthening primary care services and public health laboratories. Along with three multilateral development banks, ADB co-finances the provision of equipment to upgrade and enhance the capacity of primary care facilities and public health laboratories nationwide. It also addresses the adverse health impacts of climate change and improves the preparedness and resilience of the health system to handle future public health threats. The project outcome is expanded equitable access to primary care and public health laboratory services for the prevention, detection, and treatment of communicable and noncommunicable diseases and other health conditions.
Outputs	1. Procurement, installation, operation, and maintenance of equipment for primary healthcare facilities across Indonesia supported (SOPHI) 2. Procurement, installation, operation, and maintenance of equipment to tier 2, 3, 4, and 5 public health laboratory facilities across Indonesia supported (InPULS)

Health Sector:
Goods Packages – Open for International Bidding



Project Name: Loan 4430-INO Primary Healthcare and Public Health Laboratories Upgrading and Strengthening Project
Executing Agency: Ministry of Health

Goods Package	Estimate Amount
Procurement of Infant Warmer & Laboratory Analyzer	$50,928,994
Procurement of Chemistry Analyzer, Centrifugal (for Clinical Use)	$49,400,000
Procurement of High Pressure Steam Sterilizer (Autoclave)	$16,166,887
Procurement of High Pressure Steam Sterilizer (Autoclave)	$16,166,887
Procurement of Patient Bed	$10,565,466
Procurement of Vaccine Refrigerator	$19,346,067
Procurement of Dehumidifier	$50,296,825
Procurement of Non-Contact Tonometer	$100,228,474
Procurement of Thermal Ablation	$64,312,263
Procurement of Urine Analyzer II	$160,433,682