

BCG

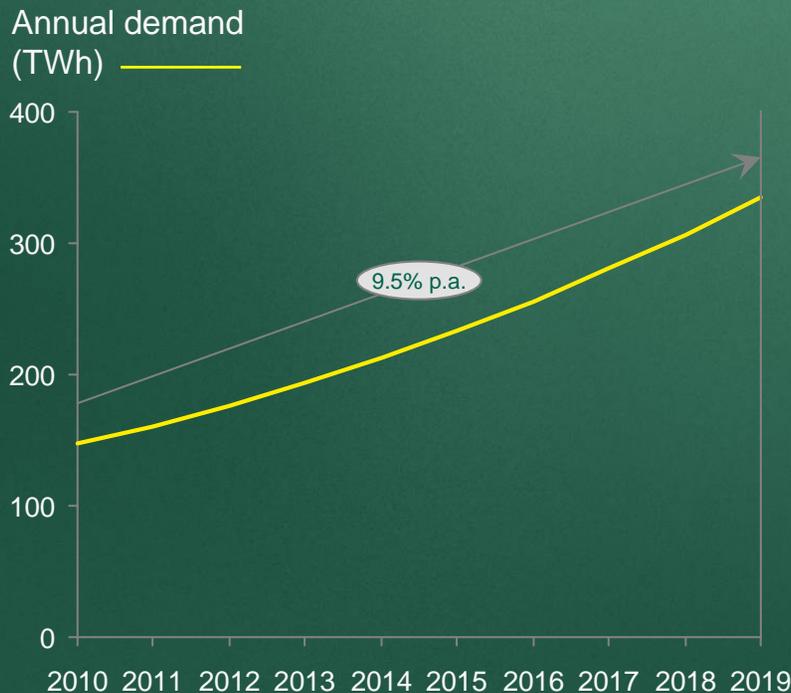
**United States-Indonesia Energy
Investment Roundtable
Panel 1: Natural Gas Pricing &
Policy**

6th February 2012, Jakarta

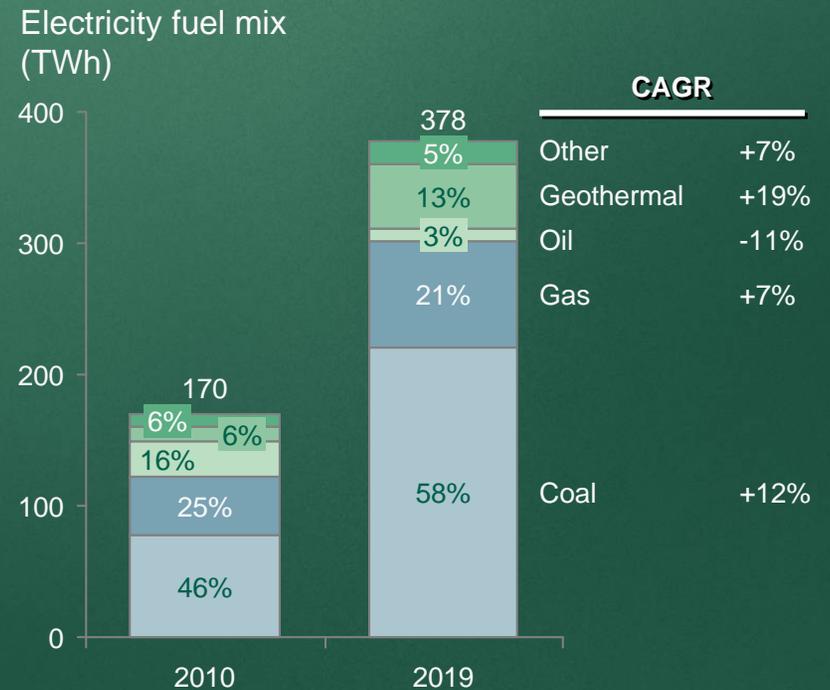
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Electricity and gas demand growing strongly

Strong electricity demand growth

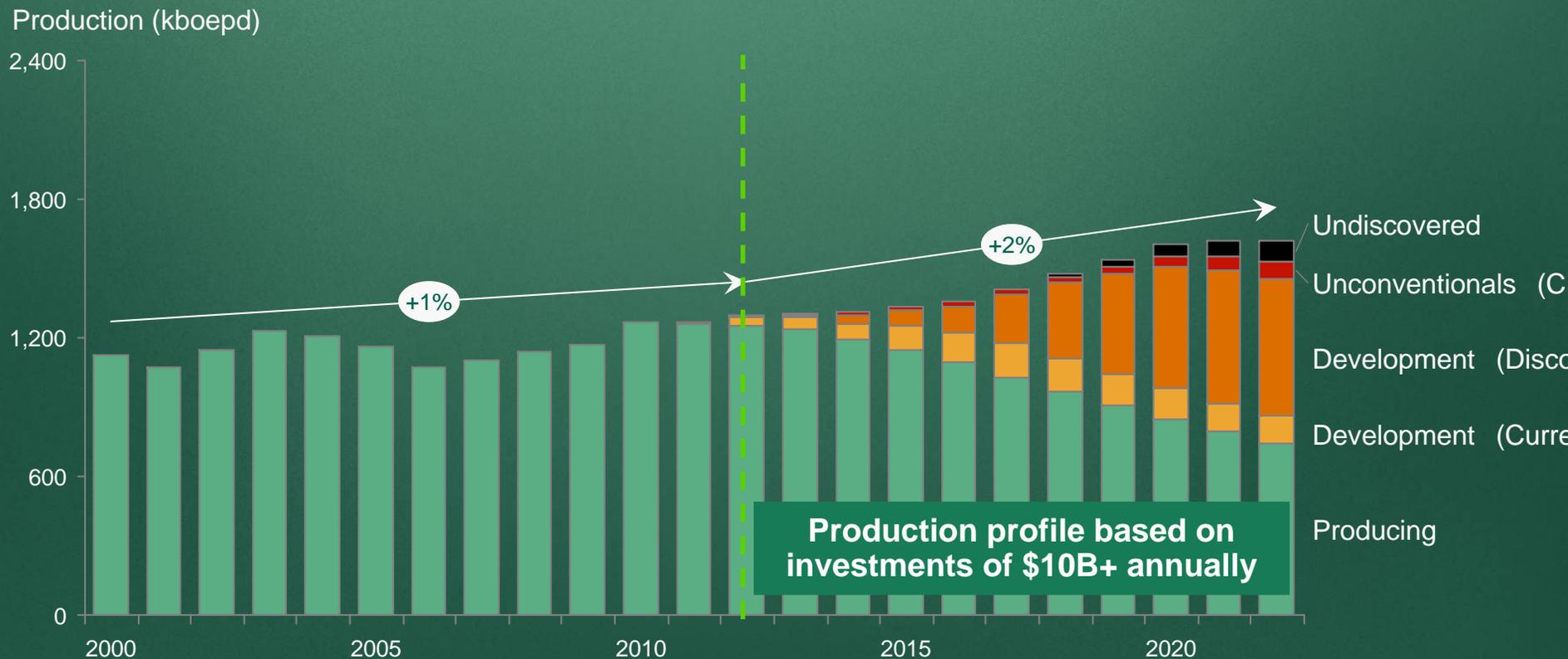


Gas demand is expected to double in the next 10 years



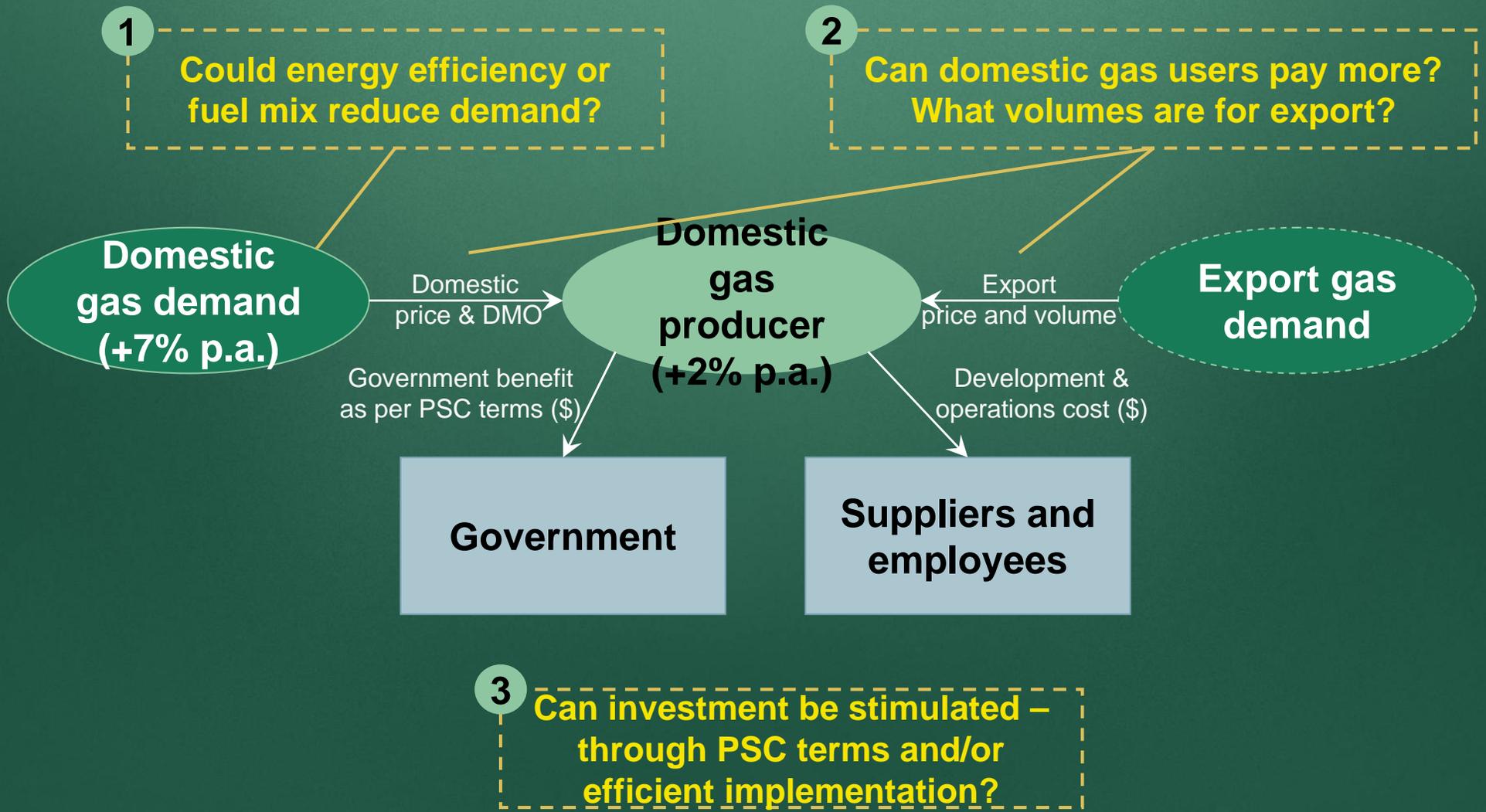
Source: PLN, MEMR, press search

Resource available but production has stagnated

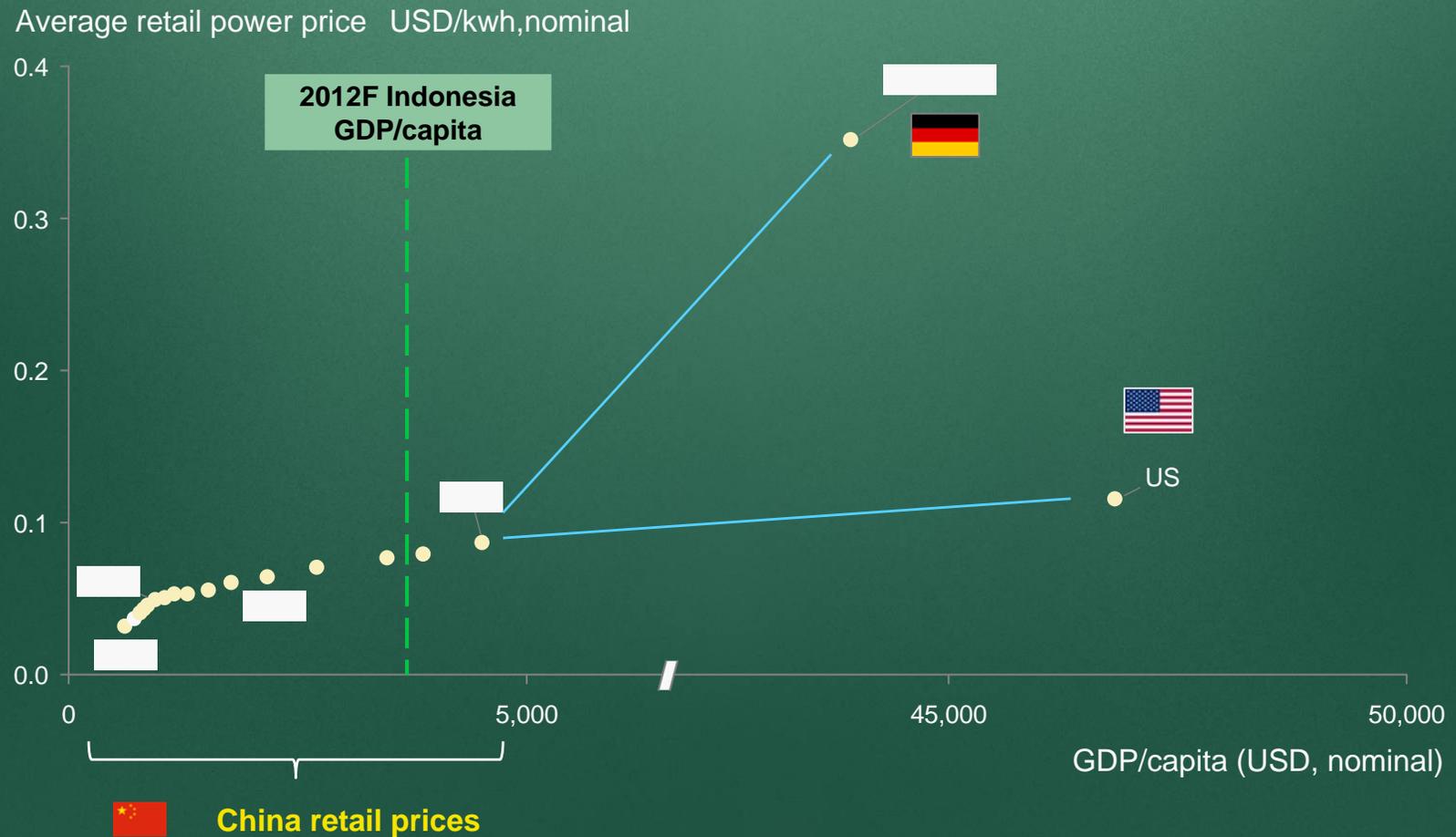


Note: Production curve does not include Natuna D-Alpha
Source: Rystad U-Cube

Framing the discussion



Economic development brings the ability to pay



Source: Berkeley, EIU, EIA, European Commission

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