Climate Action Tracker

Wind and Solar benchmarks for a 1.5°C world

INDONESIA

February 2026

Executive Summary

Context

- In 2022, 80% of Indonesia's electricity was sourced from fossil fuels. Per capita emissions were below the global average.
- With rising electricity demand over the past two decades – growing 7% annually from 2015 to 2019 – the country has turned to coal and gas to meet its energy requirements.
- Hydro is the main clean energy source in the power mix (8%). Wind and solar contributed only 0.2% in 2023.
- Indonesia targets a 34% RE share in its power mix by 2030 under its Just Energy Transition Partnership (JETP), with power emissions peaking at 250 $MtCO_2$ by 2030 and reaching net-zero by 2050. However, this excludes a significant off-grid captive coal pipeline.
- As the country significantly increases its wind and solar capacities, its archipelago nature may pose challenges for integrating high shares of variable renewable energy (VRE).
- This report examines the wind and solar capacity installation Indonesia needs for a 1.5°C compatible pathway, aligning with the goal of tripling renewables by 2030.

Key findings

- For Indonesia to meet electricity demand growth while transitioning away from fossil fuels, 77 GW of solar and 29 GW of wind by 2030 is needed.
- Electricity demand is expected to increase by 1.4x in 2030, 3.2x in 2040, and 4.5x in 2050, compared to 2022 levels. Wind and solar (alongside other renewables such as geothermal) can help meet the growing demand – 115 TWh of solar and 100 TWh of wind are needed by 2030.
- Indonesia has enough wind and solar potential to drive the transition. By 2050, around two-thirds of electricity could be provided by wind and solar.
- Meeting captive electricity demand from industrial sites would further boost the need for wind and solar and, consequently, additional international financial support.
- While our modelling finds solar power will generate more electricity than wind, our results indicate a more balanced split between wind and solar compared to country-level studies, which show a significant emphasis on solar power alone.

Wind & solar
1.5°C benchmarks

Generation capacity in **2022**	Generation capacity in **2030**
0.5 GW	**106 GW**
0.2 GW Wind	**29 GW** Wind
0.3 GW Solar	**77 GW** Solar

Context

At COP28, governments agreed to triple global renewable capacity by 2030 globally to stay in line with 1.5°C. This report highlights the potential implications of this COP28 decision at the national level, focusing on **Indonesia**.

Wind and solar deployment is accelerating around the world. However, expected wind and solar capacity deployment under current policies falls short of what is needed for 1.5°C, and is concentrated mainly in a few regions.

Research is needed to understand the pace of wind and solar deployment that aligns with the highest plausible ambition and is compatible with 1.5°C

This project aims at answering the following questions:

- **How much wind and solar generation is needed (TWh) at the national level?**
- **How much wind and solar needs to be built (GW of capacity)?**
- **When does it need to be built by, and how quickly?**

Policy context

Indonesia's unconditional 2030 NDC target aims to cut emissions by 29-32% below the 2030 BAU scenario, reaching 1805 $MtCO_2e$ in 2030 (excl. LULUCF), which is **148% above the 2010 levels**. The country is updating its 2035 NDC, which is expected to include a net-zero GHG target by 2060.

Indonesia's current renewable targets are to reach **29 GW of solar and 9 GW of wind by 2030**, as per the Just Energy Transition Partnership (JETP) Indonesia from in 2023.

Under current policies and market conditions, the IEA estimates that **solar capacity will reach 16 GW in 2030**, up from 0.3 GW of solar in 2022. Meanwhile, **wind capacity is projected to reach 2 GW in 2030**, up from 0.2 GW in 2022.

The archipelago nature of the country could pose challenges to integrating a high share of variable renewable energy. Additionally, a realistic decarbonization pathway must also address captive coal plans, requiring significant additional deployment of renewable energy to meet off-grid electricity demand in the industry sector.

International support

The key analytical elements (high ambition country-level studies and downscaled 1.5°C compatible global pathways, see Methods) do not consider financing requirements.

Significant global resource transfers will be required in line with 'common but differentiated responsibilities and respective capabilities' to achieve these benchmarks.

We do not quantify the technical and financial support needed to achieve the wind and solar rollout presented in this report. This should be a country-driven exercise and some governments have already initiated such processes, including under the JETP umbrella.

High-income countries will need to provide substantially increased climate finance to support emissions reduction abroad, in line with their 'fair share' of climate action.

Achieving these benchmarks in lower-income countries is therefore a global responsibility, rather than a domestic responsibility. Therefore, ambitious climate finance commitments and delivery are essential to support high ambition at the national level.

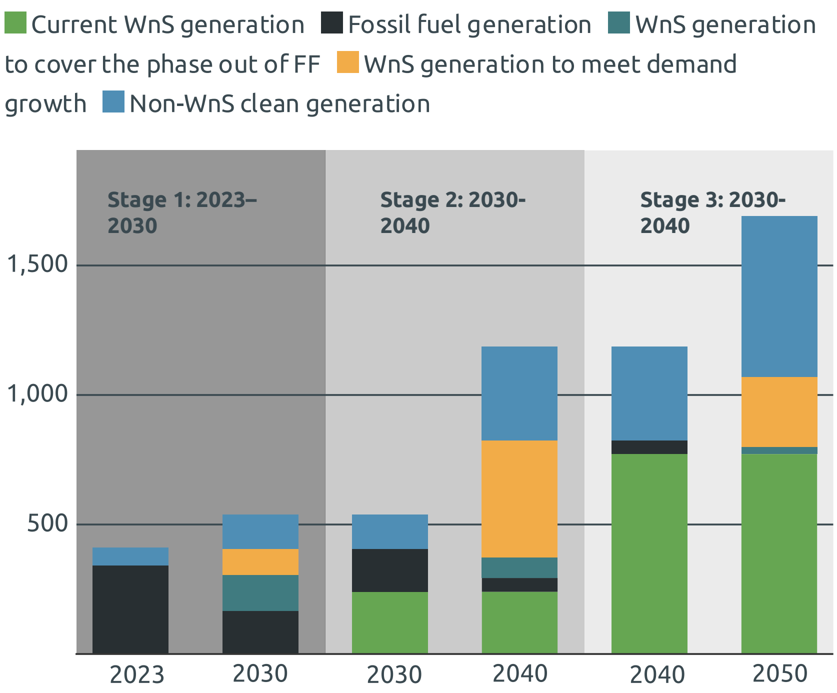
National enabling factors

Key enabling factors for ambitious wind and solar rollout include:

- **Institutional capacity.** A rapid build-out of wind and solar will require the governance and institutional capacity to develop, implement and enforce policy frameworks.
- **Just transition.** A just transition will be needed to take along all stakeholders, particularly those employed by the fossil economy.
- **Grid development.** Substantial increases in both transmission and distribution grid infrastructure will be necessary to integrate large-scale new wind and solar generation into the power system.
- **Fossil fuel phase-out.** Existing fossil fuel infrastructure often will need to be retired earlier than its economic lifetime. Policies need to be developed to achieve the early phase out of fossil fuel plants.
- **System flexibility.** Energy storage (diurnal and seasonal), flexible generation technologies such as hydro and geothermal, and increased demand side flexibility will all be crucial.
- **Market design.** Reform of market designs and regulation adapted to RE-based systems that incentivise and mobilise investments to install renewable energy at the scale needed (e.g., minimise cost of capital, ensure revenue certainty, etc).

Results

Stages of power sector decarbonisation



The stages of the electricity system transition in Indonesia

WnS = Wind and Solar

Figure 1 – Electricity generation in each stage in TWh

In a 1.5°C pathway, countries must add solar, wind, and other clean technologies to meet rising power demand while replacing phased-out fossil fuels. The evolution of the power capacity mix over successive decades varies across countries.

From now until 2030, Indonesia would need to add 12 GW of wind and 32 GW of solar capacity to meet growing demand alone. Another 16 GW of wind and 44 GW of solar will be needed to displace the share of fossil fuels in the electricity generation mix.

Power sector transformation and the increasing participation of variable renewable energy (VRE) – mainly wind and solar – in a country's power mix gives rise to a set of technical challenges linked to the integration of VRE sources. Six phases can be distinguished here, from phase 0 (pre-development with negligible amount of VRE shares) to phase E (with over 80% VRE shares). More information about these phases can be found in Annex A.

Meeting the benchmarks for 2030 will put the Indonesia in Phase C, with wind and solar making up 45% of the generation mix. Periods in which VRE dominates system behaviour become increasingly frequent. A key operational challenge is maintaining system stability during sudden disruptions in supply or demand. Curtailment of VRE may become necessary to preserve system security. Without structural adjustments, integration constraints of VRE into the system may slow further increases in renewable energy shares despite additional installed capacity.

Figure 1 and Table 1 both show the stages of the transition to a decarbonised power sector in terms of the volumes of existing wind and solar and what is needed to displace fossil fuels and meet demand increases. Figure 1 shows the stages in terms of electricity generation and Table 1 shows it in terms of generation, capacity and share of the electricity mix.

Table 1: Stages of the electricity system transition detailing how much generation capacity of wind and solar will be needed to displace fossil fuels in the system and meet growing electricity demand

	2023		2030		2040		2050
Grid integration phase (share of variable renewable energy in total electricity generation)							
Phase	Phase 0		Phase C		Phase D		Phase D
Share of VRE	**< 5%**		**< 40%**		**< 70%**		**< 70%**
Share of electricity generation							
Wind & Solar	**0.3 %**		**45 %**		**65 %**		**63 %**
Other renewables	17 %		25 %		31 %		37 %
Fossil Fuels	**83 %**		**31 %**		**4.5 %**		**0 %**
Generation capacity							
To displace fossil fuels		**+60 GW**		**+54 GW**		**+25 GW**	
Wind & Solar	**2.4 GW**	**+15 GW/yr**	**110 GW**	**+36 GW/yr**	**470 GW**	**+27 GW/yr**	**740GW**
To meet demand increase		**+44 GW**		**+310 GW**		**+240 GW**	
Generation							
Total	**410 TWh**	32%	**540 TWh**	120%	**1200 TWh**	42%	**1700 TWh**
Wind & Solar	1.2 TWh		240 TWh		770 TWh		1100 TWh
Generation Capacity of VRE (variable renewable energy)							
To displace fossil fuels			16 GW		7 GW		7 GW
Wind capacity	**1.2 GW**		**29 GW**		**75 GW**		**146 GW**
To meet demand increase			12 GW		39 GW		65 GW
To displace fossil fuels			44 GW		47 GW		19 GW
Solar capacity	**1.3 GW**		**77 GW**		**394 GW**		**589 GW**
To meet demand increase			32 GW		270 GW		180 GW

Note: Numbers are rounded to two significant figures, which may contribute to minor differences in totals. The calculations assume that wind, solar, and other renewables contribute equally and proportionally to displacing fossil fuels and meeting demand growth.

Future electricity demand

Electricity demand is taken from the IEA's study "An Energy Sector Roadmap to Net Zero Emissions in Indonesia" exploring net zero pathways for Indonesia. We take demand from the pathway which achieves net zero CO_2 emissions by 2050. Total electricity demand grows strongly out to 2050, driven by economic development and increased electrification.

This scenario excludes the potential rise of new off-grid coal plants to power heavy industrial facilities, particularly for critical mineral processing. Including this demand would increase the need for wind and solar capacity, requiring additional international financial support.

Future electricity demand growth in Indonesia is highly uncertain: the IEA's net zero scenario for Indonesia only reaches 1700 TWh in 2050, while in the IRENA 1.5°C scenarios, electricity demand reaches 2300-2500 TWh.

There is a significant range in the studies in terms of the expected electricity generation in 2050 – from 950 TWh to 2900 TWh. This would affect the necessary growth of wind and solar significantly. Our demand estimate is in the middle of that estimated by country-level studies.

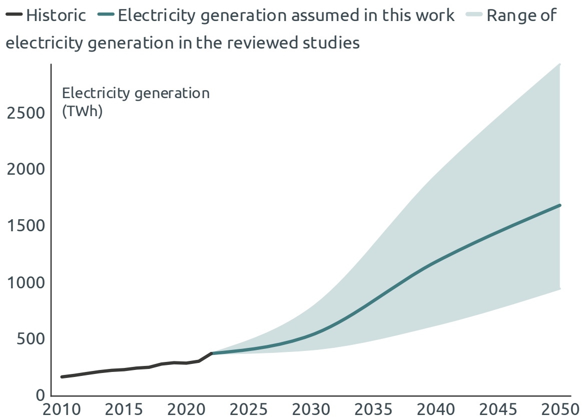


Figure 2 – Total electricity generation in TWh

Electricity generation grows more than four times in Indonesia over 2022–2050

The solid line shows the electricity generation projection used to develop the benchmarks

Pace of fossil fuel phase-out needed

The rate of fossil fuel phase-out is set by the overlap between country-level studies, downscaled 1.5°C compatible global pathways and the global milestones of the IEA's Net Zero roadmap, in which Indonesia achieves a clean power system by 2045.

To align with 1.5°C, fossil fuels must exit the Indonesian power sector during the 2040s. Fossil fuel generation falls by 25-46% by 2030, compared to 2022 levels.

The fastest rate of fossil phase-out is set by the IEA's net zero by 2050 scenario for Indonesia.

To align with 1.5°C, fossil fuels must exit the power sector in Indonesia by 2045, even as electricity demand grows rapidly

Indonesia would need to achieve clean electricity by 2045

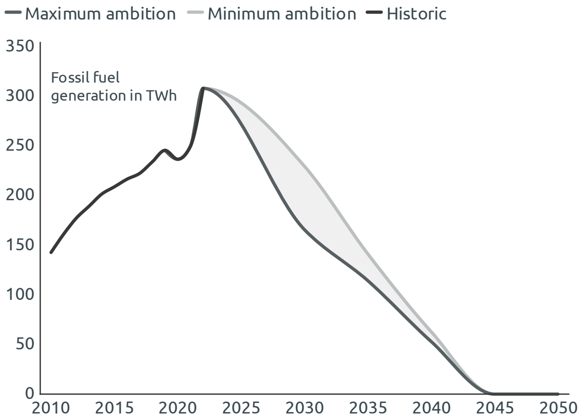


Figure 3 – Fossil fuel generation in TWh

Coal and gas phase-out in Indonesia

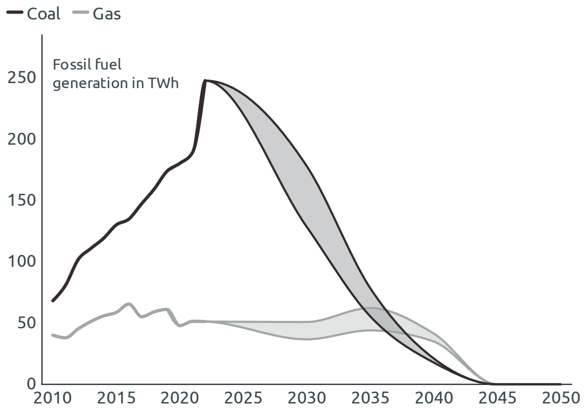


Figure 4 – Fossil fuel generation by fuel type in TWh

The role of other clean electricity generation

While wind and solar will be the workhorse of the energy transition, other clean electricity generation may play a role. We estimate the role of non- wind and solar clean electricity generation* (largely hydro, biomass, nuclear and geothermal) from country-level studies.

In our modelling, we assume that generation from clean technologies other than wind and solar in Indonesia would reach 135 TWh by 2030 and 624 TWh by 2050. This is provided by other renewables such, particularly geothermal and hydropower, with a smaller contribution from biomass. There is no nuclear deployment assumed in these benchmarks.

Flexible zero-carbon generation from other renewables can help balance wind and solar generation, and support integrating them into the grid.

Total wind and solar generation needed to align with 1.5°C

The wind and solar rollout is then calculated by combining projected electricity demand growth, the fossil phase-out necessary to align with 1.5°C, and the assumed generation from other clean technologies.

To Wind and solar is then needed to meet electricity demand growth and to drive the phaseout of fossil fuels.

To align with 1.5°C, wind and solar generation in Indonesia would need to reach 176–240 TWh by 2030. Wind and solar provides 33–45% of overall electricity generation in 2030, and 63% of overall generation in 2050.

* We do not consider CCS in the power sector, as we do not consider CCS a viable source of large-scale emissions reductions in the power sector.

To align with 1.5°C, wind and solar generation would need to grow rapidly in Indonesia

Wind and solar generation needs to grow to around 200 TWh by 2030 in Indonesia

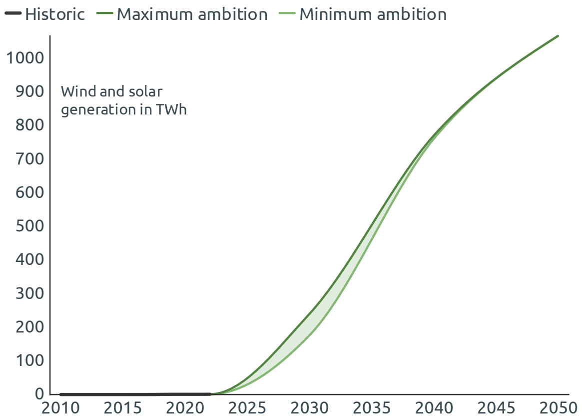


Figure 5 – Wind and solar electricity generation in TWh

Wind and solar would need to provide around two-thirds of electricity generation in Indonesia by 2050

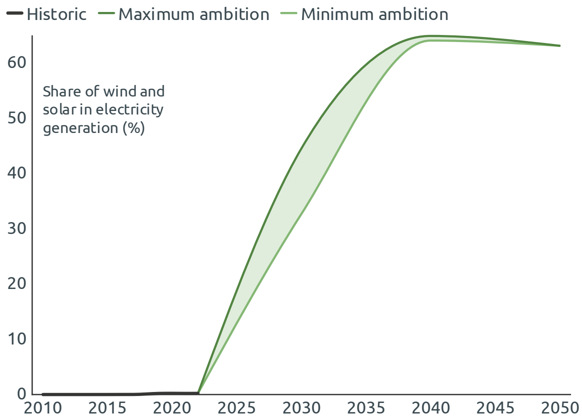


Figure 6 – Wind and solar electricity generation share (%)

Possible splits between wind and solar

The relative share of wind and solar deployment will vary depending on how various factors develop in the future. We explore one key uncertainty, the relative cost of solar and wind electricity generation (see methods). When accounting for this uncertainty, we see a range of possible future generation mixes between wind and solar.

We We highlight the median of the range as our **central benchmark**, but do not suggest that this is the only possible breakdown into wind versus solar. In the central benchmarking scenario, solar becomes the main source of generation, providing on average twice as much generation as wind in the electricity mix by 2050. This will require a rapid uptake of non-fossil flexibility options.

In this scenario, **Indonesia would need to deploy around 107 GW of wind and solar by 2030 to limit warming to 1.5°C. By 2050, total wind and solar capacity would need to reach over 730 GW**. Due to its higher capacity factor, greater wind deployment would reduce total capacity requirements. In Indonesia, solar is generally the dominant form of generation over wind.

Indonesia needs to reach almost 110 GW of wind and solar installed capacity by 2030 to align with 1.5°C

Solar capacity would reach 77 GW in Indonesia by 2030 in a 1.5°C-aligned scenario

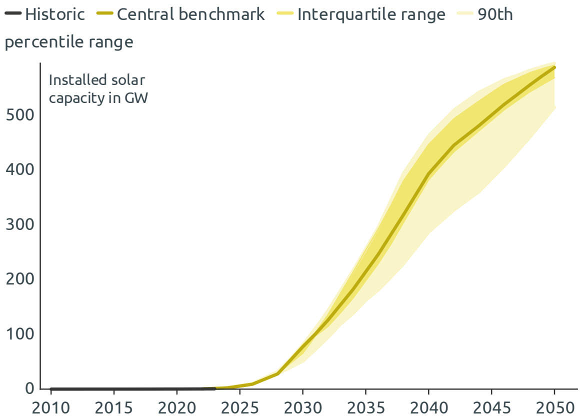


Figure 7 – 1.5°C compatible capacity benchmarks for solar in GW

Wind capacity would reach 29 GW in Indonesia by 2030 in a 1.5°C-aligned scenario

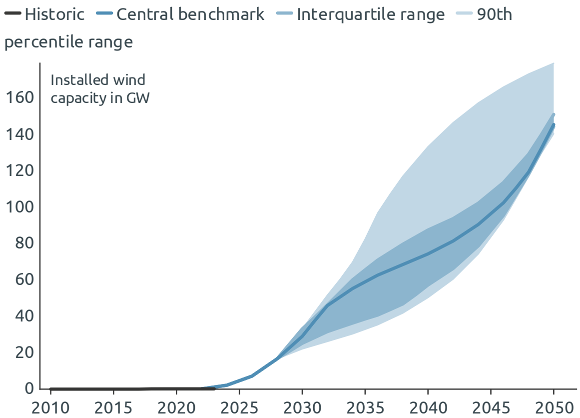


Figure 8 – 1.5°C compatible capacity benchmarks for wind in GW

The following table shows the wind and solar deployment needed to align with the central 1.5°C compatible benchmark produced. 2022 is historical data. All benchmark data from 2030 onwards is reported to two significant figures.

Table 2: Wind and solar electricity generation and capacity (2022–2050)

Scenario	Variable	Unit	2022	2030	2035	2040	2050
Central 1.5°Cbenchmark	Solar generation	TWh	0.4	120	300	520	700
Central 1.5°Cbenchmark	Wind generation	TWh	0.3	100	200	240	370
Central 1.5°Cbenchmark	Solar capacity	GW	0.3	77	220	390	590
Central 1.5°Cbenchmark	Wind capacity	GW	0.2	29	59	75	150

Table 3: Benchmarks translated into CAT format

Variable	Ambition	Unit	2030	2035	2040	2045	2050
Share of coal	Minimum	%	33	13	4	0	0
	Maximum	%	24	9	4	0	0
Share of gas	Minimum	%	10	4	1	0	0
	Maximum	%	7	3	1	0	0
Share of renewables	Minimum	%	69	88	95	100	100
	Maximum	%	57	84	96	100	100
Share of wind and solar	Minimum	%	33	51	64	70	63
	Maximum	%	45	56	65	70	63

Comparison to current rollout and country target

We compare the IEA's capacity forecast for wind and solar to the benchmarks presented in this report. The negligible participation of wind and solar in Indonesia's current electricity generation means that the country needs to substantially increase the installation of these technologies to meet its targets, let alone align with 1.5°C benchmarks. This requires substantial action over the remainder of this decade, supported by the JETP initiative and additional international support.

There is strong support from businesses for high ambition from the government to phase out fossil fuels and transition the electricity system to be powered by renewables, with 100% of executives in Indonesia polled in the Global Business Poll in favour and 88% wanting to see this transition by 2035.

Indonesia's wind and solar rollout needs to accelerate to align with 1.5°C

In Indonesia, current rollout of solar is lagging behind 1.5°C-aligned levels

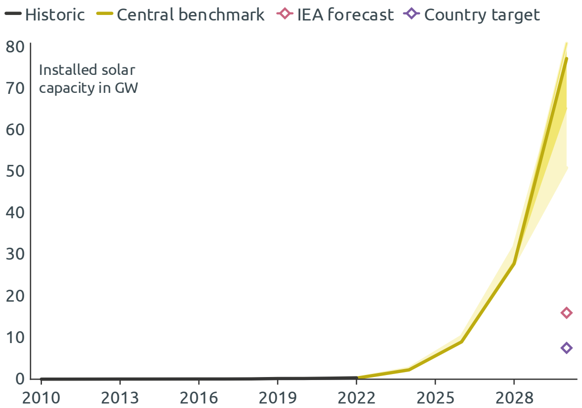


Figure 9 – Installed solar capacity in 2030 compared to targets and current policy projections in GW

In Indonesia, current rollout of wind is lagging behind 1.5°C-aligned levels

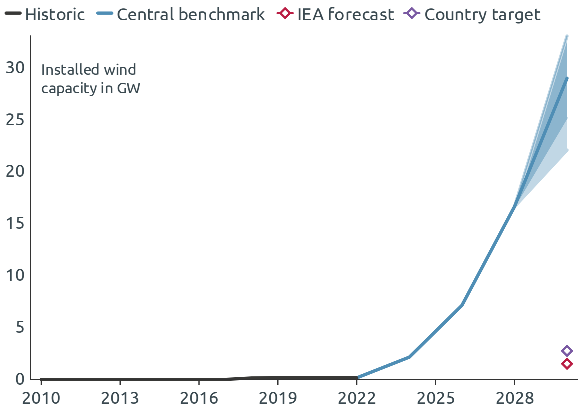


Figure 10 – Installed wind capacity in 2030 compared to targets and current policy projections in GW

Note: The target data was last pulled from Ember in January 2025. The current policies data was last pulled from the IEA in June 2025.

Indonesia needs to accelerate annual additions of wind and solar to align with 1.5°C – this will need additional international support

Indonesia would need to add on average 8.1 GW/yr of solar capacity until 2030, and 26 GW/yr by over 2030–2050

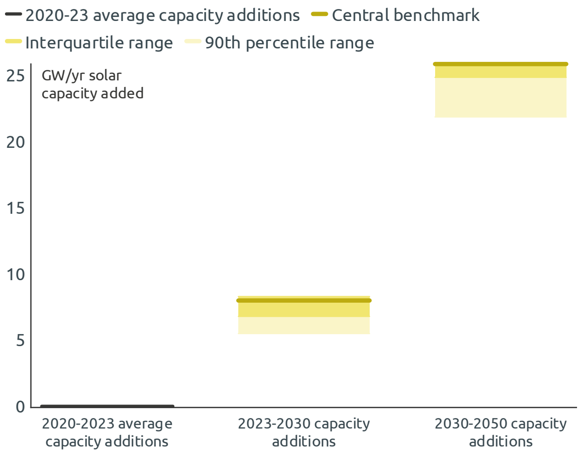


Figure 11 – Solar capacity additions per year in GW/y

Indonesia would need to add on average 3.2 GW/yr of wind capacity until 2030, and 5.7 GW/yr by over 2030–2050

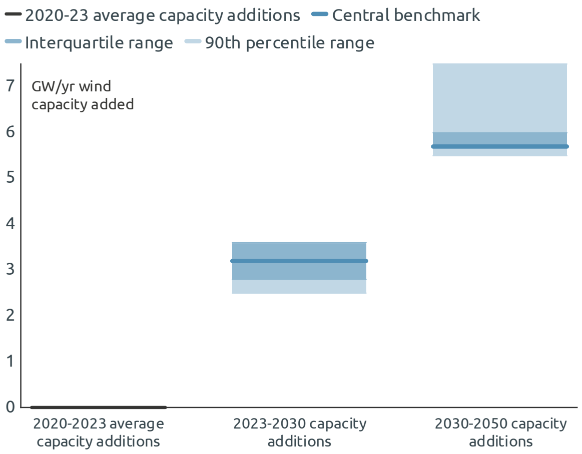


Figure 12 – Wind capacity additions per year in GW/y

Wind and solar growth in light of the JETP

Under the JETP, power sector emissions from the grid would be below 250 $MtCO_2$ in 2030 and be net-zero by 2050. The share of renewables in electricity generation would reach 44% by 2030 and 92% by 2050, with 14% from wind and solar in 2030 and 36% in 2050. This amounts to 38 GW (29 GW of solar and 9 GW of wind) of installed capacity of VRE in 2030 and 309 GW in 2050. Additionally, a study of off-grid captive systems will be conducted to help build a roadmap for decarbonization.

The amount of financing needed amounts to 20 billion USD in the coming three to five years. The financing sources needed are a mix of public and private sources, with the main source being market rate investments.

JETP includes other resources (including concessional loans, guarantees, and grants) to enable this development from various ends.

This highlights that efforts should be focused on implementation and scaling can only be achieved if significant amount of international support is provided.

Comparison with other studies

We compare the wind and solar generation seen in our analysis to that in the literature review of country-level studies. In particular, we highlight the results of modelling from IESR, conducted in collaboration with Agora-Energiewende and LUT University, exploring a pathway to net zero pathways for Indonesia.

While our modelling predicts that solar will provide more power generation than wind in 2030, 2040, and 2050, our results indicate a more balanced split between wind and solar compared to country-level studies, which show a significant emphasis on solar power, and negligible wind generation.

Our analysis shows higher wind generation and less solar generation most of the literature, including the IESR study. This difference between our modelling and the literature is most evident in 2050.

Our benchmarks are broadly aligned with the literature

Electricity generation from solar: comparison with literature in Indonesia

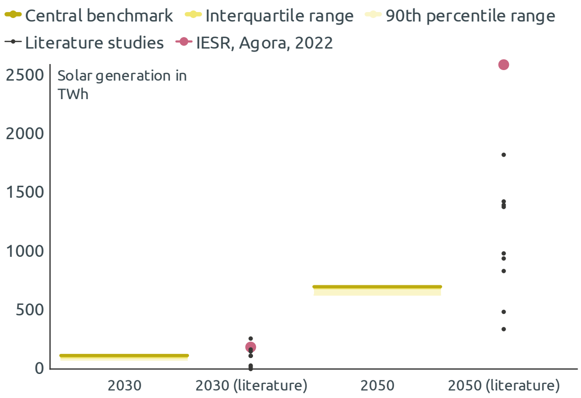


Figure 13 – Solar electricity generation in TWh

Electricity generation from wind: comparison with literature in Indonesia

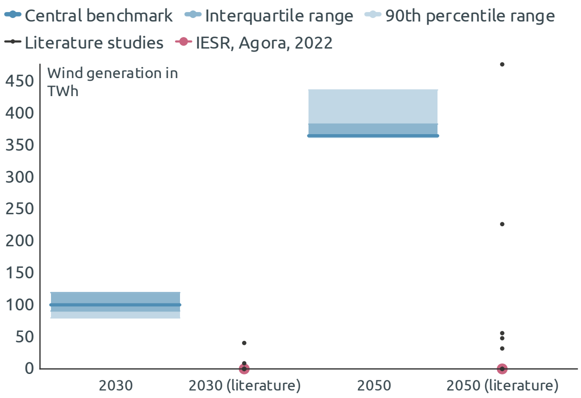


Figure 14 – Wind electricity generation in TWh

In Indonesia, our benchmarks generally suggest that solar will provide more generation than wind

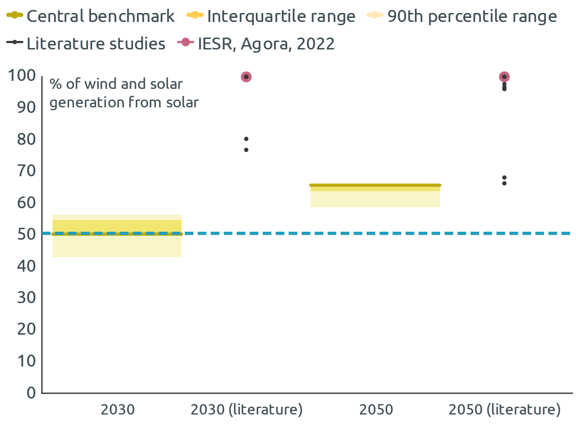


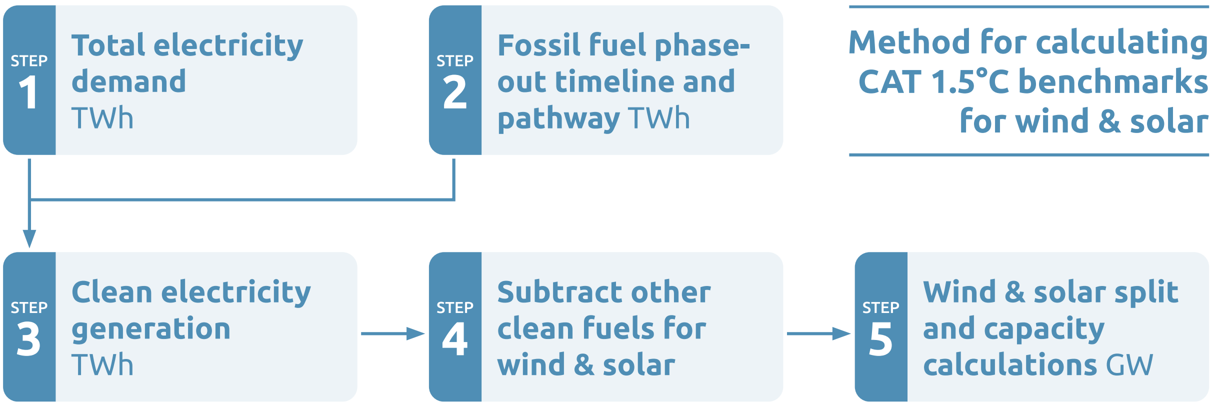
Figure 15 – Generation split between wind and solar (%)

Share of wind and solar generation that comes from solar: comparison with literature in Indonesia

The area above the blue dashed line represents a power system in which solar provides more electricity generation than wind

Methodology

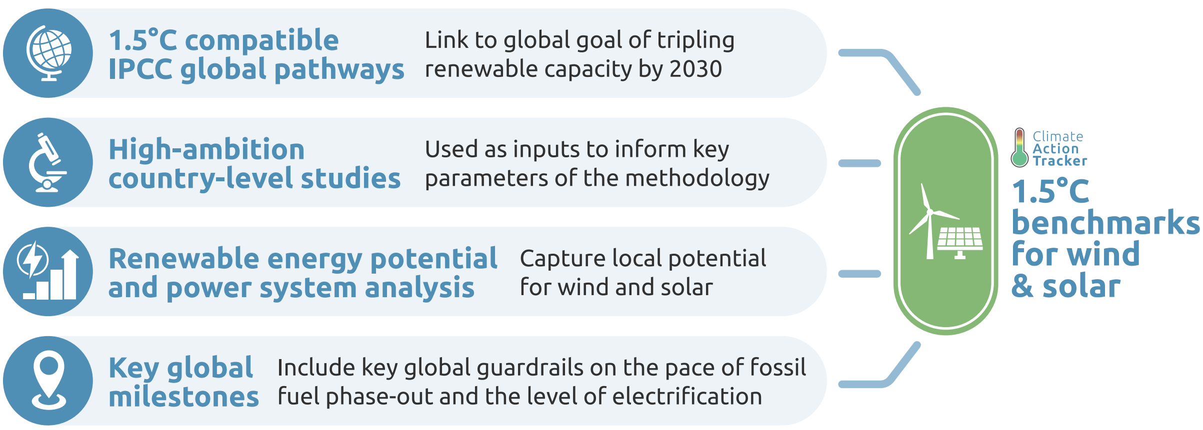
Summary of our method



Our method takes a series of steps to calculate the wind and solar generation needed for 1.5°C, and the resulting capacity deployment. The key methodological steps are highlighted below.

1. We project future electricity demand in the country.
2. We calculate the pace of fossil fuel phase-out needed to align with 1.5°C.
3. Bringing these trajectories together defines the level of clean electricity generation required to meet electricity demand growth while phasing out fossil fuels in the power sector.
4. We project non-wind and solar clean electricity generation based on country-level literature. This allows us to identify the wind and solar generation necessary to align with 1.5°C.
5. Having produced this wind and solar generation trajectory, we feed it into a simplified electricity system model (PyPSA), which calculates for a given set of cost assumptions around wind and solar, a split into wind versus solar and the associated capacity requirements.

Overlap of different elements



Our method focuses on the overlap between different elements. By looking at the range of fossil fuel phase-out which is outlined in both high ambition country-level studies and downscaled 1.5°Ccompatible global pathways, and is informed by key global milestones, we identify benchmarks which are both consistent with a global least cost pathway to limiting warming to 1.5°C but are also aligned with national–level modelling.

Combining multiple different analytical elements can help identify the most robust path to achieving a zero-carbon energy system.

For more details see the Methods Annex.

List of scenarios selected

Table 4: Country level studies for Indonesia

Study	Publication	Scenario selected
IEA, 2022	An Energy Sector Roadmap to Net Zero Emissions in Indonesia	• Announced Pledges Scenario (APS) • Net Zero by 2050
IESR & Agora Energiewende, 2022	Deep decarbonization of Indonesia's energy system: A Pathway to zero emissions by 2050	Best Policy Scenario (BPS)
IRENA, 2022	Indonesia Energy Transition Outlook	• 1.5 Degrees scenario (1.5-S RE85) • 1.5 Degrees scenario (1.5-S RE90) • 1.5 Degrees scenario (1.5-S RE100)
Reyseliani & Purwanto, 2021	Pathway towards 100% renewable energy in Indonesia power system by 2050	• 100% RE • 100% RE excluding nuclear
Teske et al., 2023	Net-zero 1.5°C sectorial pathways for G20 countries: energy and emissions data to inform science-based decarbonization targets	1.5°C

Annex A

Phases of grid integration

The grid integration phase is adapted from a de Vivero et al. report detailing a qualitative assessment framework for power system transformation and an IEA report on integrating solar and wind. We use the share of VRE sources in electricity generation to classify countries into a phase. More information about the characteristics and key challenges of each phase can be found in the report.

Phase 0 (less than 5% annual VRE share): we assign this phase when wind and solar make up 0-5% of a country's electricity generation mix. Installed VRE capacity is limited, and the impact on power system operation is negligible. Integration does not require significant operational or structural changes.

Phase A (between 5% and 15% annual VRE share): we assign this phase when wind and solar make up 5-15% of a country's electricity generation mix. Conventional power system operation remains largely sufficient for day-to-day system management. However, system planning must anticipate higher future VRE shares. This includes improving forecasting tools, integrating forecasting into dispatch decisions and moving toward shorter scheduling intervals and more real-time system operation.

Phase B (between 15% and 25% of annual VRE share): we assign this phase when wind and solar make up 15-25% of a country's electricity generation mix. The contribution of VRE varies significantly over time, with periods of very low output and periods of high penetration. This variability increases the need for operational flexibility. Enhanced coordination between system operators, network operators, and distribution system operators becomes critical to maintain system efficiency and security.

Phase C (between 25% and 40% of annual VRE share): we assign this phase when wind and solar make up 25-45% of a country's electricity generation mix. Periods in which VRE dominates system behaviour become increasingly frequent. A key operational challenge is maintaining system stability during sudden disruptions in supply or demand. Curtailment of VRE may become necessary to preserve system security. Without structural adjustments, integration constraints of VRE into the system may slow further increases in renewable energy shares despite additional installed capacity.

Phase D (between 40% and 70% of annual VRE share): we assign this phase when wind and solar make up 45-80% of a country's electricity generation mix. Periods in which VRE availability exceeds demand occur more frequently than in earlier phases. Ensuring system stability while continuing to increase renewable penetration requires additional measures, such as expanded demand response, stronger interconnections and large-scale energy storage. Market design and regulatory frameworks become increasingly important to enable these solutions. Although particularly critical in this phase, many of these measures should begin in earlier phases (B and C) to provide long-term investment signals and facilitate a smoother system transformation.

Phase E (more than 70% share of annual VRE share): we assign this phase when wind and solar make up 80-100% of a country's electricity generation mix. The power system reaches very high VRE penetration. The primary challenge becomes ensuring adequacy during extended periods of low wind and solar availability. Addressing this requires long-duration energy storage, sector coupling allowing for export and import of power between economic sectors in the same country and extensive electricity trade both within regions and between countries.

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Design Designers For Climate

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Authors names are listed alphabetically.

The Consortium

The Climate Action Tracker (CAT) is an independent scientific analysis produced by three research organisations tracking climate action since 2009. We track progress towards the globally agreed aim of holding warming well below 2°C, and pursuing efforts to limit warming to 1.5°C.

climateactiontracker.org

Climate Analytics is a non-profit institute leading research on climate science and policy in relation to the 1.5°Climit in the Paris Agreement. It has offices in Germany, the United States, Togo, Australia, Nepal and Trinidad and Tobago.

climateanalytics.org

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