The 2010 – 2035 Indonesian Population Projection

Understanding the Causes, Consequences and Policy Options for Population and Development

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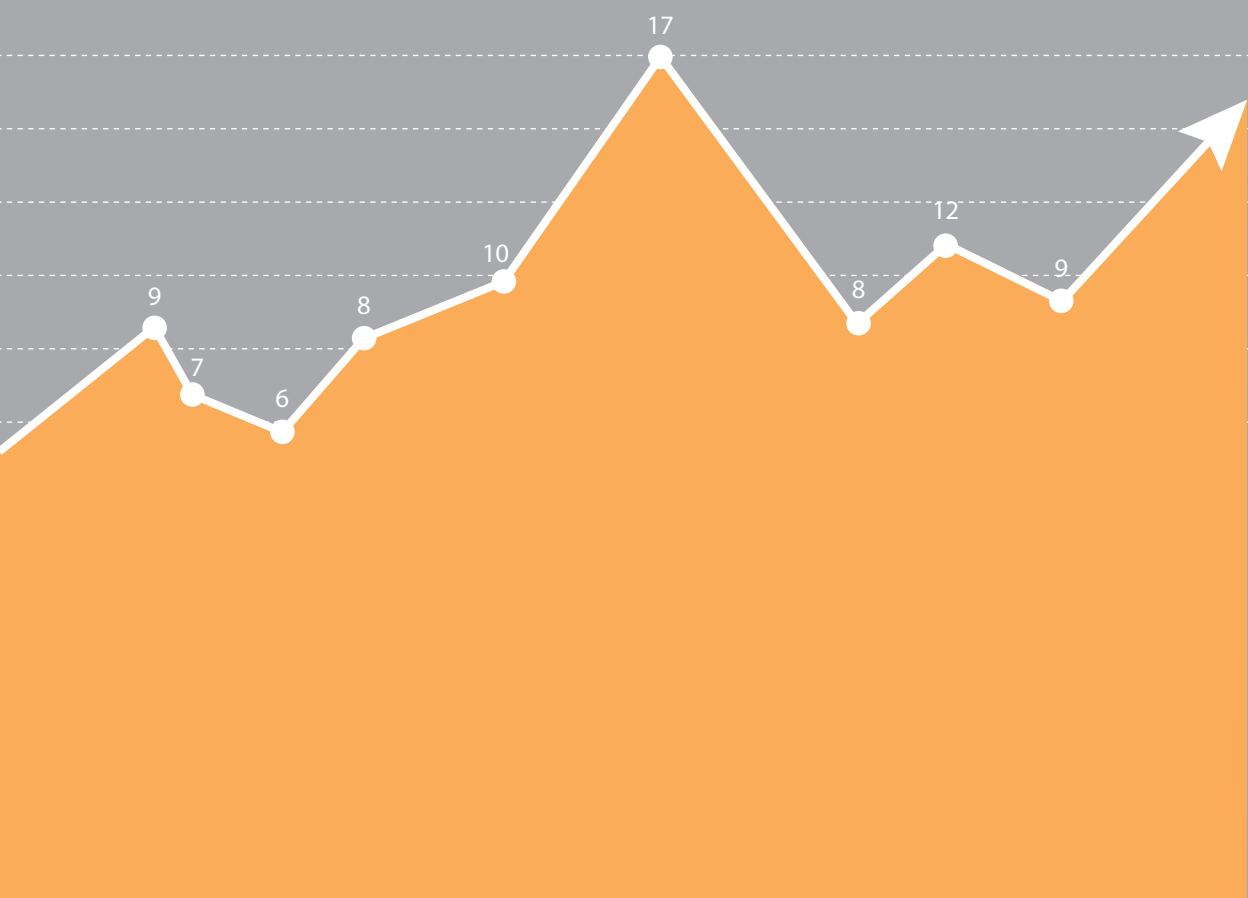

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Introduction

The Indonesian government requires a set of population projections for planning purposes, and a new official set of projections is prepared after each population census has been completed. The latest set of projections were completed and presented to the public on 29 January 2014, at an occasion presided over by the President. These projections are for the population of Indonesia as a whole, as well as for each of its 33 provinces. They were prepared by a team comprising representatives from relevant government agencies and university experts, reporting to Ministry of National Development Planning/ National Development Planning Agency (Kementerian PPN/Bappenas) and BPS-Statistics Indonesia. Preparation of the projections was supported by the United Nations Population Fund (UNFPA).

Background to the Projections

Since the beginning of the 21st Century, Indonesia's population has grown more than had been expected. This is because of a stalling of the fertility decline, which had proceeded steadily over the 1970s, 1980s and 1990s. Use of different sources of data gives somewhat different pictures of the trends in fertility, but what is clear is that the fertility decline experienced during the 1990s has not continued in the present century; fertility in 2012 was barely different from its level in 2002 (Hull, forthcoming), and remained above replacement level (i.e. the level which, if continued into the future, will eventually lead to the population size remaining constant). New projections based on such evidence of course show both a different base population for 2010 and different trends in future than earlier projections.

Summary of methodology

A national population projection requires an adjusted base population, estimates of base year fertility and mortality rates, and estimates of international and internal migration. In the case of international migration, because of great uncertainty about numbers and trends, the assumption

was that net migration would be zero. The remaining need, then, was for assumptions about the other three variables, for each province. In the case of fertility, the past trend was taken into account, and TFR assumed to reach replacement level in 2025 using a logistic function. For individual provinces, past trends for each province were taken into account, and a logistic function used to project future fertility. In the case of mortality, the infant mortality rate was projected based on past trends and government policy, using a logistic function. Similar procedures were used for the projections for individual provinces. The Appendix provides a table showing the assumed fertility and mortality rates by province in 2010-15 and projected to 2030-35.

In the case of internal migration, projections were based on the pattern of internal migration by age and sex over the previous 5 years, as calculated from the 2010 Population Census.

Projections of the urban and rural population were also included, using the Urban Rural Growth Difference method. For provinces where the urban rural growth difference has been high (more than 30 per cent), the difference is assumed to gradually narrow; where the difference has been moderate, the difference is also assumed to narrow, only more slowly; where the difference has been low (less than 20 per cent), it is assumed to increase slowly.

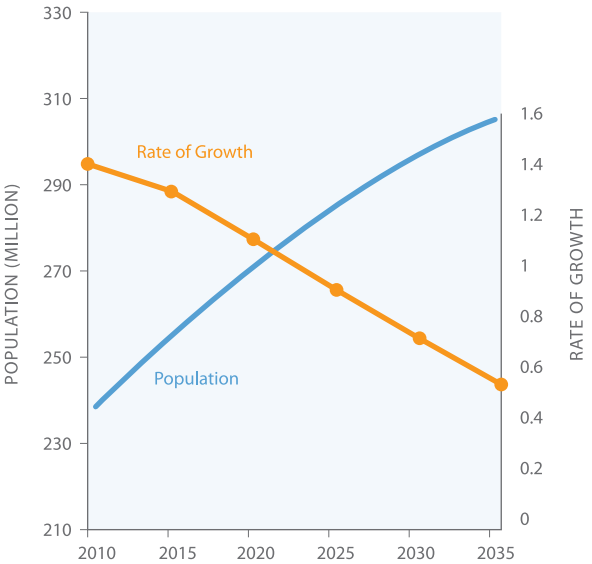
Using these approaches, projections were prepared for Indonesia as a whole, and for each individual province. The provincial projections were then adjusted mathematically, to constrain their totals to sum to the totals for Indonesia. Information is not provided about the extent of adjustment that was required to the initial provincial projections.

Growth of population

Over the next 25 years, Indonesia can expect to experience very substantial population growth – an increase of 67 million, or 28 per cent (see Figure 1). The rate of growth will be gradually slowing – from 1.38% per annum in the 2010-2015 period to 0.62% per annum in the 2030-2035 period. Where will the increase be taking place? Much of it - 30 million - will take place in the densely populated island of Java, raising the overall population density in Java from 1,068 per sq. km. in 2010 to 1,304 per sq. km. in 2035 – one of the highest densities in the world, just surpassed by Bangladesh, which had a population density of 1,174 per sq. km. in 2011. The high density is not evenly spread over the whole island. There are sparsely settled areas, particularly on the upper slopes of Java's numerous volcanoes and in some southern coastal areas, and very densely settled areas in the big cities and in the more favoured agricultural areas. In the entire Jabodetabek mega-urban region, which covers 6,400 sq. km., the population density is 6,400 per sq. km. Overall, 59 per cent of Java's population already lives in urban areas, and this is expected to reach 78 per cent in 2035.

Figure 1.

Projection of Indonesia's Population, 2010-2035



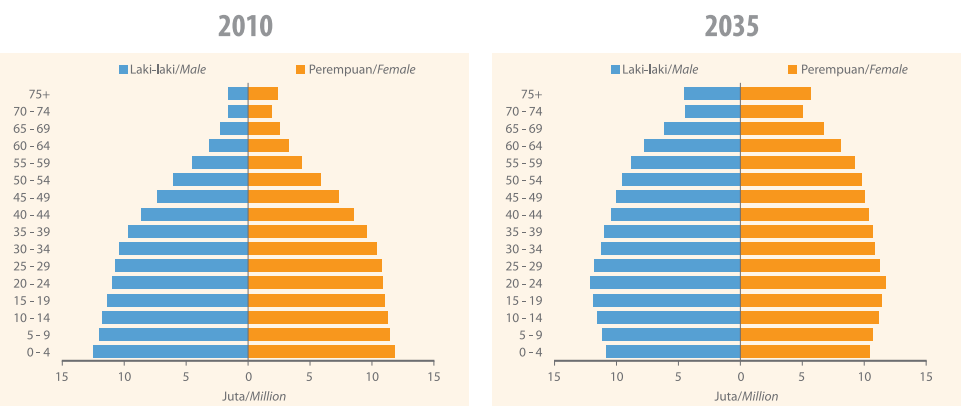
Despite its projected continuing growth, Java's share of Indonesia's population will continue its long-term slow decline – from 57 per cent to 55 per cent over the 25-year projection period. This is partly because of lower fertility, on average, in Java than elsewhere in Indonesia, and partly because of Migration.

Indonesia's changing age structure

While Indonesia's overall rate of population growth will be steadily declining, the growth of different age groups within the population will vary considerably. As shown in Figure 2, the population pyramid in 2010 was already somewhat cylindrical up to around age 35, as a result of steady declines in fertility in

Figure 2.

Indonesian age pyramids, 2010 and 2035



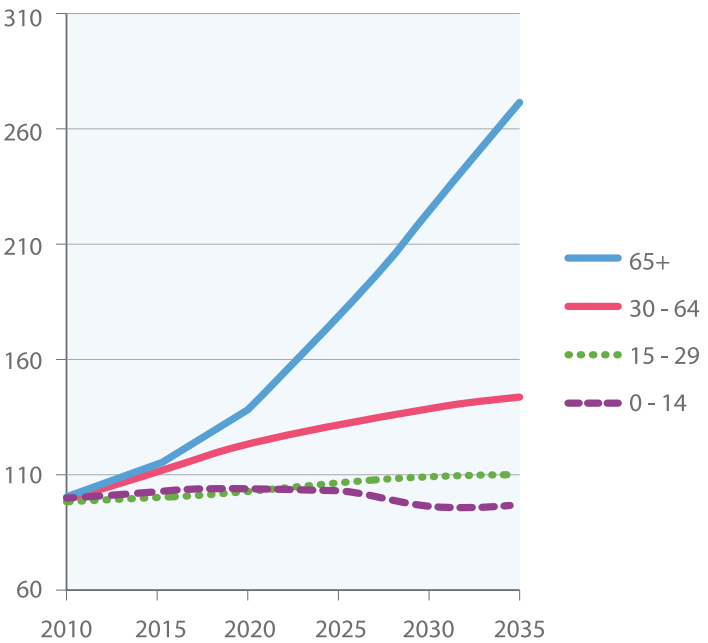
the 1970s, 1980s and 1990s. By the year 2035, the cylindrical shape will have advanced up to ages in the early 50s, and there will be a slight undercutting at ages below 20, which was not in evidence in the 2010 pyramid. The section of the pyramid which will broaden noticeably over the period is that of the population aged in the late 40s and above.

Figure 3 shows that the number of children will increase slightly over the next 10 years and then start to decline. The number of women in the main reproductive ages – 15 to 34 years old – will also continue to increase slowly throughout the projection period (though only by 9 per cent; not shown in Figure 3), meaning that the annual number of births will also increase unless fertility rates decline. Since fertility rates are indeed projected to decline gradually, the number of births is expected to remain roughly constant and then begin to decline slightly over the decade beginning in 2010.

The younger segment of the working-age population – those aged 15-29 – will continue to increase slowly. However, the working-age population of more mature age – those aged 30-64 - will increase rapidly, as a result of higher fertility rates at the time when they were born. The fastest growth of all will be in the elderly population – those aged 65+, whose numbers are expected to increase by 20.5 million, or 173 per cent, over the 25-year projection period.

Figure 3.

Projection of age groups: 0-14, 15-64, 65+ : index of growth (2010=100)



Source: Indonesia: Indonesia Population Projection, 2013.

These projections have a number of important implications for planning:

- Numbers of primary and secondary school-aged children will continue to increase, though increases in most provinces will be partly offset by decreases in some. As Indonesia aims to reach 9, and then 12, years universal education, the challenge of raising enrollment ratios at the more expensive middle and upper secondary levels of education will be great.
- Numbers in the younger working ages will continue to increase, but the increase will be much greater in the mature working ages – 30-64. How this will play out in terms of unemployment rates and increases in labour productivity will depend on many factors, including the soundness of general economic planning and more specifically, of manpower planning.
- The increasing numbers of elderly will require attention to the needs of this most rapidly growing segment of the population (pensions, health care, etc.)

Each of these issues will be discussed in more detail below.

Education

Indonesia has profited greatly from the deceleration in growth in the number of children, resulting from steady declines in fertility rates in the 1970s, 1980s and 1990s. This enabled a higher proportion of children to be enrolled in school and the average number of years of school to be extended. However, even now, not all children complete primary school, the aim of making nine years education compulsory has not yet been achieved and the quality of education leaves much to be desired (Suryadarma and Jones (eds), 2013). Before the evidence became clear that fertility decline had stalled, it had been expected that by now, the number of school-age children in Indonesia would not be increasing, thus making the task of reaching universal nine years education much more manageable. However, we now know that the number of school-age children is still increasing, though not by much. Numbers in the age groups 5-14 are projected to increase as follows:

Year	Numbers in the age groups 5 – 14 years old
2010	44,684 million
2015	45,792 million
2020	47,234 million
2022	47,427 million **(the maximum figure)**
2030	45,957 million
2035	44,426 million

The rise over the current decade is manageable, though given the many factors increasing educational costs, achievement of educational goals would have been helped if numbers of potential pupils had not been increasing.

The main challenges facing educational planning in Indonesia are not those of numbers, but rather the need to raise the quality of education and to level the playing field so that children from lower socio-economic groups are not as disadvantaged as at present. With regard to quality, Indonesian students perform poorly in educational tests compared not only with OECD countries, but also compared with neighbouring countries, Malaysia and Thailand (Suryadarma and Sumarto, 2011: 172-180). Children from lower socio-economic groups are much less likely to reach upper secondary levels of education than are those from more advantaged backgrounds. Great geographical differences also continue to be observed between different districts of Indonesia (Suharti, 2013).

Manpower planning, reducing unemployment, raising skills

The share of younger groups (aged 15-29) in the working age population will decline from 40 per cent to 34 per cent between 2010 and 2035. But their share of the employed population will depend on whether many of them delay entry into the labour force by staying on longer in educational institutions, whether others who have left school enter the labour market, and the rate of unemployment of those who are in the labour force. It is likely that as a result of the extension of average years of schooling, the labour force participation rate of those in the age group 15-29 will decrease; the effect of other factors in determining labour force participation rates is harder to predict. As for unemployment rates, it is hoped that they can be lowered over time, but this will depend on the trends in economic growth and in the labour intensity of the growing sectors of the economy.

The decline in the share of younger workers in the labor force is likely to have both negative and positive effects. On the negative side, because young workers tend to be, on average, better educated and more familiar with and capable of dealing with new technology, the decline in their share will hold back progress in raising average levels of education and of technological competence of the workforce. On the positive side, more mature workers have advantages over younger workers in terms of experience and learning on the job. Moreover, slower increase in the number of younger workers, and increasing educational levels among those joining the workforce, may help in dealing with high levels of youth unemployment.

Rapid growth of the elderly population

The age group within the population that will show the most rapid increase is the elderly population - those aged 65+. The share of this age group in the total population is expected to more than double from 5.0% in 2010 to 10.6% in 2035. Although this is rapid, it is not as rapid as the increase in the elderly's share in some neighbouring countries over the same period – from 4.8% to 11.2% in Malaysia, from 8.9% to 22.9% in Thailand and from 8.4% to 19.5% in China. In the Indonesian context, it is important to recognize that the extent of ageing will vary considerably by province. In 2010, the proportion of

population aged over 65 ranged from 9.3% in Yogyakarta, and 7% in Central and East Java, down to less than 2% in Papua and Papua Barat and not much more than 2% in the Riau Archipelago and in East Kalimantan. Clearly, this proportion has been affected both by fertility and migration patterns. In 2035, while proportions of elderly population are projected to have risen throughout Indonesia, inter-provincial differences will remain considerable, with the proportion of elderly expected to be over 14% in Yogyakarta and in East and Central Java, but less than 6% in Papua and Papua Barat and not much more than 6% in the Riau Archipelago and North Maluku. Ageing poses important issues for planners – ranging from changing health care needs in the society, to income maintenance for the elderly and more generally, ways to ensure their continued involvement in family and society. The concept of active ageing is relevant here; as defined by WHO (2002: 12) "active ageing is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age".

Trends in dependency ratios

The dependency ratio is a simple way of portraying the "burden" the employed population faces in producing enough to meet the needs of the entire population, including those who are too young or too old to be in the workforce. Conventionally, the young dependants are considered to be those below the age of 15, and the old dependants those above the age of 65. Clearly, this is a very crude measure, because many young people above the age of 15 are still in school; many others in the working ages are not in the workforce because they do not want to work (for example, many mothers with young children) or are unable to find work; and many elderly people continue to work above the age of 65. However, as a rough indicator of the effect of age structure changes on the share of the population in the workforce, the dependency ratio is useful.

In Indonesia, the dependency ratio has been falling for some time because the long-term decline in the fertility rate has lowered the proportion of children in the population. As shown in Figure 4, this trend is expected to continue, with the dependency ratio declining further from over 50 in 2010 to about 47 in 2028, thereafter rising slightly by 2035 as the rapid growth of the elderly population starts to have a more marked effect on the ratio. Clearly, Indonesia faces a favourable situation in terms of dependency ratios over the coming two decades.

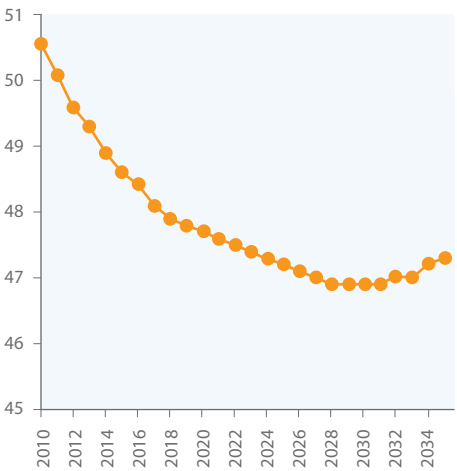
Trends in provincial shares of population – main regions and 10 largest provinces

Java, with only 7 per cent of Indonesia's land area, has always had the great majority of its population. However, over a long period of time, Java's share

of Indonesia's population has been slowly declining, from more than 70 per cent in 1900 and 69 per cent in 1930 to 57 per cent in 2010. Part of the reason was the effect of the transmigration program in moving population away from Java, but Java also had lower fertility rates than elsewhere in Indonesia. Over the projection period, however, the shares of the main islands and the largest provinces will not change very much, as is evident in Table 1. The share of West Java will increase steadily, as will that of Banten and Riau. In the case of both West Java and Banten, the effect of the expansion of the mega-urban region of Jakarta into these adjoining provinces is very clear.

Figure 4.

Trend in Dependency Ratio (0-14 & 65+/15-64)



Source: Indonesia: Indonesia Population Projection, 2013

Table 1.

Projected share of population: main islands and 10 largest provinces

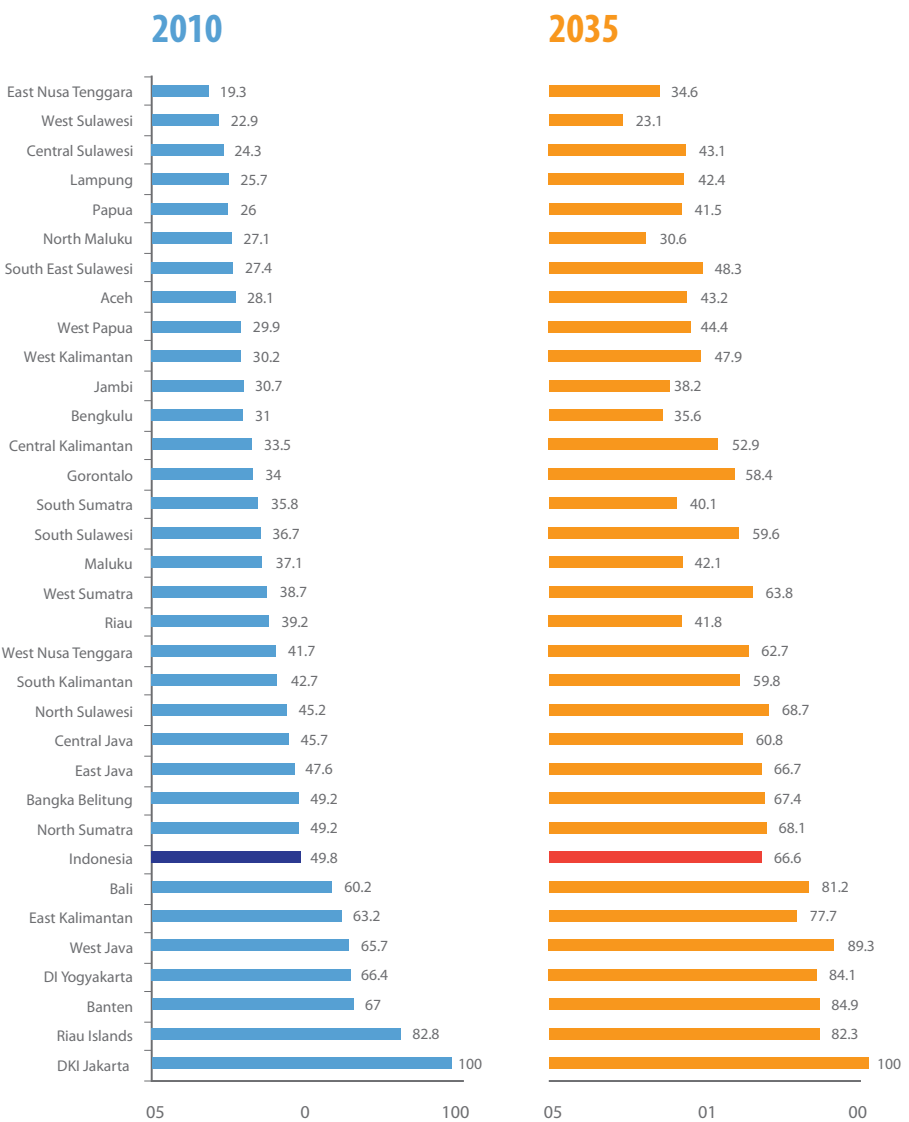
Main island	2010	2035
Java-Madura	57.5	54.7
Sumatera	21.3	22.4
Kalimantan	5.8	6.6
Sulawesi	7.3	7.4
Other islands	8.1	8.9
Largest provinces		
West Java	18.1	18.7
East Java	15.7	13.5
Central Java	13.6	12.2
North Sumatera	5.5	5.3
Banten	4.5	5.2
DKI Jakarta	4.0	3.7
South Sulawesi	3.4	3.2
Lampung	3.2	3.0
Riau	2.3	3.1

Urbanization

Urbanization in Indonesia will proceed apace over the next quarter of a century. While half the population was already living in urban areas in 2010, this is expected to reach two thirds by 2035. There will remain enormous inter-provincial differences, however. By 2035, 90 per cent of those living in Java, west of the West Java-Central Java border, will be urban dwellers. This massive urban population of 76 million will be concentrated mainly in the twin mega-urban regions of Jakarta and Bandung; in contrast, less than 40 per cent of the populations of East Nusa Tenggara (NTT), Sulawesi Barat and Maluku Utara will be living in urban areas.

Figure 5.

Trends in proportions urban, provinces of Indonesia, 2010-2035



Source: Indonesia: Indonesia Population Projection, 2013

The pace of urbanization will vary considerably between provinces, as evident in Figure 5. Based on past trends, the level of urbanization will rise only slowly in provinces such as West Sulawesi, North Maluku, Jambi, Bengkulu and South Sumatra. It will rise rapidly in provinces such as Central Sulawesi, South Sulawesi, North Sulawesi, West Sumatra, and all the provinces of Java. These trends in urbanization, of course, could be modified if certain development activities that can be foreseen at the moment take place, thus altering patterns of migration.

According to the projections, Indonesia's rural population has already begun to decline slightly in absolute numbers. This slight decline in numbers is expected to continue into the future, as shown in Table 2. By 2035, the rural population is expected to number barely over 100 million, whereas the urban population will exceed 200 million, having increased by 71 per cent since 2010.

Table 2.

Projected growth of the urban and rural population

Year	Urban population (millions)	Rural population (millions)
2010	118.8	119.7
2015	136.2	119.3
2020	153.7	117.4
2025	170.9	113.9
2030	187.9	108.5
2035	203.6	102.1

The shift from being a predominantly rural population, which has been the condition of Indonesia over the centuries, to one in which two thirds of the population lives in urban areas, will require many changes in planning emphasis. It is very important, however, that the needs of the rural population are given adequate attention. Rural populations are disadvantaged in a number of ways, including having poorer access to educational and health facilities, lack of infrastructure, especially in more isolated areas, and lower levels of income. There is a risk that as their share of the total population declines, they will be increasingly ignored by political leaders and planners, even though their needs are great.

Indonesia in its Southeast Asian context

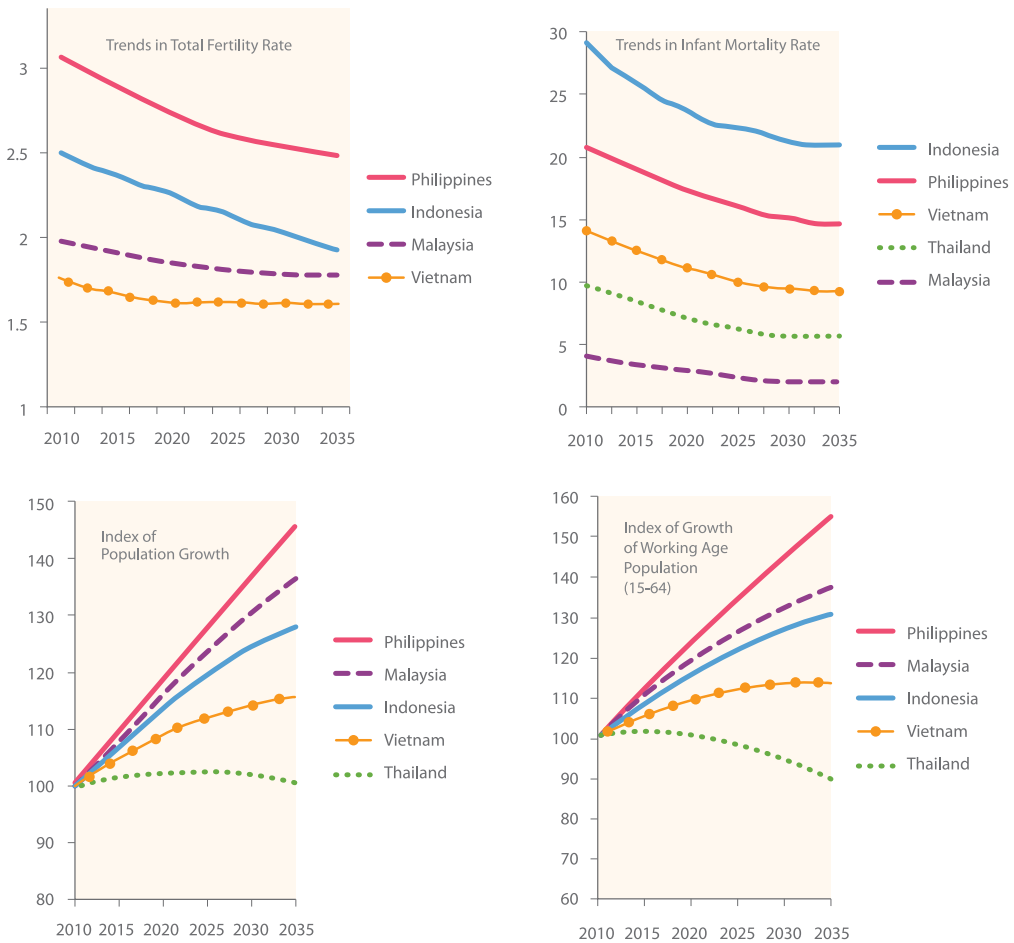
It may help in understanding the implications of the projection of the Indonesian population to place these in the context of trends in population in some of its larger neighbouring countries. Indonesia is by far the largest country in Southeast Asia, with a population comprising 40 per cent of the entire population of Southeast Asia. Figure 6 shows the comparison between Indonesia and the Philippines, Malaysia, Vietnam and Thailand in projected

fertility, mortality, population growth and growth of the working-age population. For Indonesia, the official projections are used, while for the other countries, the analysis is based on the medium projection of the latest United Nations population projections.

Indonesia's fertility rate remains well above those of Malaysia, Vietnam and Thailand, but well below that of the Philippines. It is projected to decline to replacement level by 2025, whereas the United Nations projects those of Malaysia, Vietnam and Thailand to remain below replacement level, and that of the Philippines to decline only slowly, remaining well above replacement level in 2035. Thus projected fertility trends show Indonesia lying well above Malaysia, Thailand and Vietnam, though well below the Philippines.

Figure 6.

Comparison of demographic indicators between Indonesia and selected ASEAN countries



Source:

Indonesia: Indonesia Population Projection, 2013
All other countries: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2012 Revision, http://esa.un.org/unpd/wpp/index.htm

Unfortunately, the infant mortality rate in Indonesia is higher than that in any of the comparator countries. Although it is expected to decline steadily, it is not expected to close the gap between it and the other countries, which are also expected to experience further declines. The higher infant mortality in Indonesia is reflected in lower expectation of life at birth – 69.6 in Indonesia in 2005-2010, compared with figures between 73 and 75 in the other countries, except the Philippines, which although having lower infant mortality than Indonesia, also had lower expectation of life. In 2035, expectation of life at birth will have risen in all the countries, but Indonesia will remain behind all the others except the Philippines, with a figure of 74.4, compared with estimates of over 78 for Malaysia, Thailand and Vietnam.

Although the population projections do not specifically project maternal mortality ratios, it should be noted that Indonesia faces a major problem in having higher maternal mortality ratios than any of the comparator countries included in Figure 6. While estimates of maternal mortality are notoriously difficult, and subject to a wide range of uncertainty, careful international estimates for 2008 show Indonesia with much higher Maternal Mortality Ratios than any of the other more populous countries of Southeast Asia (229, compared with 84 in the Philippines, 64 in Vietnam and 47 in Thailand – see Hogan et al., 2010). Indeed, the point estimate of MMR increased between the 2007 and 2012 Demographic and Health Surveys from 229 in 2007 (CI (*Confidence interval*): 132-323) to 359 in 2012 (CI: 239-478), though the very wide confidence intervals surrounding both figures means that it is not certain whether an increase actually took place. What is clear is that the MMR in Indonesia has not decreased as expected, and remains far above the MDGs target of 102. To significantly reduce MMR, a cascade of actions is needed to ensure continuity of obstetric care, but two key factors that could help in lowering maternal mortality would be an increase in the proportion of deliveries attended by skilled birth attendants, and an increase in the proportion of obstetric complications that are managed in hospital.

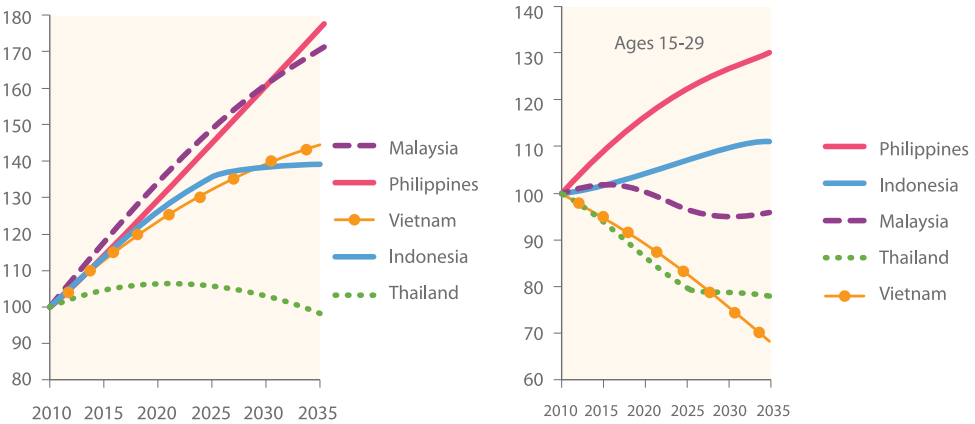
The projected population growth rate in Indonesia will be below that in the Philippines but above that in the other countries. Growth in Malaysia is expected to be not far below that in Indonesia, because Malaysia is expected to experience continuing immigration. Thailand's population in 2035 is expected to be slightly lower than in 2010 because of continued below-replacement fertility levels. As for the growth of the working-age population, in Indonesia the increase will be less than in the Philippines or Malaysia, but above that in Vietnam or Thailand. Indeed, in Thailand, the working age population is expected to decline steadily after about 2020.

As stressed earlier, studies of the growth of the working-age population really need to divide this very broad age group (15-64) into its components, as there is a great difference between, say, a 17 year old and a 62 year old worker. The age group could be disaggregated in various ways, but here a simple division into two segments is used – those aged 15-29 and those aged 30-64

(see Figure 7). Focusing first on the older segment (aged 30-64), the growth in Indonesia will be less than in Malaysia and the Philippines, and roughly the same as in Vietnam, whereas in Thailand there will be only slight growth and then a decline.

Figure 7.

Index of Growth of Working Age Population, selected Southeast Asian countries (2010=100)



Source:

Indonesia: Indonesia Population Projection, 2013
All other countries: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2012 Revision, http://esa.un.org/unpd/wpp/index.htm

In the younger segment (aged 15-29), Indonesia's slight growth will be well below that of the Philippines, but well above that of Malaysia, Vietnam and Thailand, all of which will experience a substantial decline in this portion of the working-age population. It can be argued that the projected increase in the size of Indonesia's working-age population, though it does pose considerable challenges for job creation and productivity, does present the opportunity for continued steady economic growth, provided that the education and training system can deal effectively with the problem of relatively low quality of those completing their education and entering the workforce (Suryadarma and Jones (eds), 2013).

Conclusion

The official population projections for Indonesia show that considerable population growth will take place over the next 25 years, though the rate of increase will be slowing. As this brief note has stressed, the growth of population in Indonesia should be manageable, and the changes in age structure will in many ways be favourable for more rapid economic development, though much will depend on the quality of Indonesia's economic and social planning

and the efficiency with which development programs are conducted. The challenges should not be underestimated. For example, increasing population, and an expected steady rise in per capita income levels, will lead to enormous increases in consumption, needs for infrastructure development, and issues in reconciling these with the preservation of the natural environment. Regional development will also be quite varied, and the population redistribution between regions, and differing age structure trends between regions, will mean that the policy response will need to differ between regions.

Population projections always have to be based on the best estimate of the base population at the time, and the best assumptions about future trends in fertility, mortality and migration. These official projections for Indonesia have been prepared in this way, carefully assessing the available evidence about population structure and trends, and the most likely scenarios for future trends. A scenario in which both fertility and mortality will decline more rapidly than assumed in these projections can easily be imagined. In any case, like all population projections, they will need to be re-assessed and revised when new data become available. A new set of projections are planned after the results of the 2015 Intercensal Population Survey (SUPAS) become available. While Indonesia needs one set of projections for planning purposes, for analytical purposes, it is desirable that probabilistic projections be prepared, which highlight the uncertainty of future trends (Keilman, 2002).

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Appendix Table.

Fertility and mortality rates by province, 2010-15, and projected to 2030-35

Province	Fertility (TFR) 2010-2015	Fertility (TFR) 2030-2035	Infant Mortality Rate 2010-2015	Infant Mortality Rate 2030-2035
Aceh	2,787	2,186	28	26
Sumatera Utara	3,008	2,240	34	25
Sumatera Barat	2,943	2,238	33	25
Riau	2,863	2,350	24	19
Jambi	2,411	1,886	26	21
Sumatera Selatan	2,527	2,037	31	23
Bengkulu	2,398	2,017	33	26
Lampung	2,603	1,914	28	22
Kep. Bangka Belitung	2,429	2,034	28	21
Kepulauan Riau	2,312	1,961	30	22
DKI Jakarta	1,876	1,628	20	14
Jawa Barat	2,418	1,939	21	15
Jawa Tengah	2,262	1,802	25	18
DI Yogyakarta	1,897	1,665	13	11
Jawa Timur	2,012	1,733	26	20
Banten	2,469	1,854	30	25
Bali	2,076	1,774	23	17
NTB	2,653	2,154	48	34
NTT	3,614	3,066	43	33
Kalimantan Barat	2,662	2,095	28	22
Kalimantan Tengah	2,580	2,114	36	32
Kalimantan Selatan	2,670	2,012	37	27
Kalimantan Timur	2,635	2,081	17	12
Sulawesi Utara	2,389	1,903	24	19
Sulawesi Tengah	2,780	2,300	39	28
Sulawesi Selatan	2,540	2,043	29	22
Sulawesi Tenggara	3,141	2,475	27	22
Gorontalo	2,488	2,109	39	30
Sulawesi Barat	3,025	2,638	55	39
Maluku	3,337	2,764	47	37
Maluku Utara	3,138	2,571	38	29
Papua Barat	2,903	2,454	48	37
Papua	2,663	2,263	49	37
INDONESIA	**2,442**	**1,990**	**28**	**21**

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