

## Intisari

Kebijakan hilirisasi nikel di Indonesia bertujuan untuk meningkatkan nilai tambah ekonomi melalui pembangunan *smelter* nikel di daerah penghasil nikel utama. Studi ini mengkaji dampak keberadaan *smelter* nikel terhadap kesejahteraan rumah tangga di lima kabupaten tempat *smelter* beroperasi menggunakan pendekatan *difference in differences (DiD)*. Data yang digunakan bersumber dari Survei Sosial Ekonomi Nasional (Susenas) periode 2014–2022. Hasil penelitian menunjukkan bahwa pengoperasian *smelter* nikel berdampak signifikan terhadap kesejahteraan rumah tangga. Pengoperasian *smelter* nikel di Kabupaten Morowali, Morowali Utara, Konawe, dan Halmahera Selatan mampu meningkatkan rata-rata pengeluaran per kapita rumah tangga, dengan dampak terbesar terjadi di Kabupaten Morowali. Namun, keberadaan *smelter* nikel di Halmahera Tengah justru menurunkan kesejahteraan rumah tangga. Analisis *growth incidence curve (GIC)* menunjukkan bahwa pengoperasian *smelter* nikel mampu meningkatkan rata-rata pengeluaran per kapita rumah tangga kelompok kelas menengah ke bawah secara signifikan. Namun, terjadi pergeseran pertumbuhan rata-rata pengeluaran per kapita rumah tangga setelah beberapa tahun *smelter* nikel tersebut beroperasi di beberapa kabupaten. Kelompok rumah tangga kelas menengah ke atas justru menikmati pertumbuhan rata-rata pengeluaran per kapita yang lebih tinggi dibandingkan kelompok rumah tangga kelas menengah ke bawah. Temuan-temuan tersebut menunjukkan bahwa dampak hilirisasi nikel tidak merata dan bergantung pada kondisi sosial-ekonomi serta dinamika lokal di masing-masing wilayah. Studi ini memberikan implikasi kebijakan bahwa hilirisasi nikel perlu disertai dengan strategi yang lebih tepat sasaran untuk memastikan manfaatnya dapat dirasakan secara merata oleh seluruh kelompok masyarakat.

**Kata Kunci:** Hilirisasi nikel, *smelter* nikel, kesejahteraan rumah tangga, *difference in differences*, *growth incidence curve*

## Abstract

The nickel downstream policy in Indonesia aims to enhance economic added value through the development of nickel smelters in major nickel-producing regions. This study examines the impact of nickel smelters on household welfare in five districts where smelters are operating, using the difference in differences (DiD) approach. The data utilized in this study are from the National Socioeconomic Survey (Susenas) for the period 2014–2022. The findings indicate that the operation of nickel smelters has a significant impact on household welfare. The presence of nickel smelters in Morowali, North Morowali, Konawe, and South Halmahera has led to an increase in average household per capita expenditure, with the most significant impact observed in Morowali. However, in Central Halmahera, the operation of nickel smelters has instead resulted in a decline in household welfare. The growth incidence curve (GIC) analysis reveals that the operation of nickel smelters significantly boosts average per capita expenditure among lower-middle-class households. However, after several years of smelter operations, a shift in expenditure growth trends is observed in several districts, with upper-middle-class households experiencing higher average per capita expenditure growth compared to lower-middle-class households. These findings suggest that the impact of nickel downstream is uneven and depends on the socioeconomic conditions and local dynamics of each region. This study implies that the nickel downstream policy should be accompanied by more targeted strategies to ensure that its benefits are distributed equitably across all community groups.

**Keywords:** Nickel downstream, nickel smelter, household welfare, difference in differences, growth incidence curve