

## **COMPETITOR ANALYSIS**

### **KEY PARTICIPANTS IN THE TELECOMMUNICATIONS INDUSTRY**

All telecommunication equipment used in Brunei is imported. The top three country suppliers are Japan, the US and Germany. Between 1982-1989, Japan had the leading share of total imports, B\$54 million (32%), followed by West Germany and the USA with B\$40 million and B\$39 million respectively. In addition, a large percentage of equipment is imported to Brunei from supply agents located in Singapore.

Japan and Germany have supplied the bulk of switching equipment, telephone sets and certain telephonic apparatus. Parts of telegraphic apparatus are sourced mainly from Malaysia. The US is the largest supplier of navigational products.

Capital equipment contracts are awarded by Brunei Telecom to leading suppliers with international reputations and tried and tested systems. Such suppliers have included AT&T, Motorola (USA), NEC, Fujitsu, Toshiba (Japan), Philips (Singapore), Samacon (France), Autelec (Switzerland), British Telecoms, Cable and Wireless (UK), Siemen (Germany), and Ericsson (Sweden).

The projects awarded to foreign suppliers have included :

- a B\$5.2 million paging system awarded to Siemens in 1985.
- a B\$8 million Cellular Mobile Telephone Exchange awarded to Motorola in 1988.
- a B\$4.5 million contract to supply fibre optics cable for interexchange connections with Marconi (Italy).
- B\$17 million tender for an International Telephone Exchange awarded to AT&T.
- Philips (Singapore) has provided the country with radio links and subscriber radio equipment.

In 1980, NEC supplied an analog electronic telephone exchange with a capacity of 27,000 lines. In 1986, Siemens supplied an 11 unit digital telephone switching exchange to provide an additional capacity of 5000 telephones. Currently, half of the units have been implemented and are in operation.

Canadian participants between 1977 and 1982 included :

- SR Telecom Canada which supplied 5 microwave telephone systems (B\$3.5 million)
- Mitel which supplied the government some Private Automated Branch Exchanges (PABX)
- Alberta Government Telephone (AGT) which supplied 1,200 cellular mobile phone units (B\$2 million)

More recently, Canadian suppliers, Northern Telecom and Mitel, have submitted tenders including national switching equipment and PABX, respectively.

### **KEY CUSTOMERS IN THE SECTOR**

In Brunei, the government (e.g. Ministry of Telecommunications, the Police Force) and Brunei Shell (50% private, 50% Brunei government) procure 95% of the country's telecommunications equipment. The private sector purchases the remainder. Customers also include residential and commercial consumers.

### **CURRENT MARKETING TRENDS**

Telecommunications tender notices appear on Wednesdays in "*Pelita Brunei*", the government newspaper. For large projects, companies should contact the Director of Telecommunications directly. Equipment supplies such as pipes, cables and wires can be handled through local agents.