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CANADIAN HIGH COMMISSION

SECTORAL ANALYSIS - BRUNEI PUBLIC UTILITIES INDUSTRY

March 1990

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CANADIAN HIGH COMMISSION

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SECTORAL ANALYSIS - BRUNEI PUBLIC UTILITIES INDUSTRY

CONTENTS

This report covers the following topics :

Background - Directional Emphasis of Sector	Page 1
- Economic Overview	a contra
- Current Situation	2
- Future Trends	5
	aler is freate
Competitor Analysis	
- Key Participants in the Electricity and Water Sector	6
- Key Customers in the Sector	7
- Current Marketing Trends	7
	'
Industry Incentives and Regulations	
- Government Regulations	8
- Local Preference Policy	8
uale Beigh to Render Stri Begaven but there are no acusehold conn	
Appendices	
- Key Business and Government Contacts	
- Other Tax Incentives Administered by the	
Economic Development Board	
- Ministry of Development : Organization Chart	
Imports of Electrical Services Equipment into Brunei	
- Suppliers of Electrical Equipment Represented in Brunei	
- List of Wholesale & Distributors of Electrical Supplies	
- List of Wholesalers & Distributors of Water Treating	
Service & Equipment	
\$1.54). Capital Hulleview to science to the adjustice projects have	

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The Canadian High Commission in Singapore, Commercial Section, commissioned SRI International to prepare this sectoral analysis overview. This report is designed to help Canadian organizations meet their initial information needs regarding participation in this sector in Brunei. The information presented is believed to be accurate and from sources SRI believes to be reliable. Readers are urged to verify pertinent information before committing resources.

SECTORAL AMALYSIS - BRUNEI PUBLIC UTILITIES INDUSTRY

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BACKGROUND

DIRECTIONAL EMPHASIS OF SECTOR

To accelerate the pace of economic diversification in view of the less favorable outlook of oil prices in Brunei, the government has focused on developing a solid infrastructural base as a means to advance economic and social development. Since Brunei's independence, January 1, 1984, the government has upgraded the production and distribution of electricity and water supplies.

Public utilities are administered by the Department of Electrical Services and the Department of Public Works. The Ministry of Development (MOD), one of nine Ministries established on January 1, 1984, oversees both the Public Works and Electrical Services Departments. The Electrical Services Department controls and maintains electricity generation and registers electrical contractors while the Public Work's Department operates the national waterworks system.

At present, 98% of the population receives potable water and electricity. Water is treated at 5 treatment plants: Tasek, Sungai Tutong, Layong, Seria, and Kg Sumbiling.

Electricity is generated at 4 power stations: Lumut, Temburong, Seria and the Brunei Shell Petroleum complex, and two stand-by stations: Layong, and Muara. In 1987, Brunei's total installed electricity capacity was 387,000 kilowatts (kwh) of which 59% was at Layong.

The national electrical network comprises of 250 kilometres of 66 kilovolt (kv) transmission line, 1000 kilometers of 11 kv line. A main power control center has yet to be constructed.

Gas is produced solely by Brunei Shell Petroleum (BSP) in Kuala Belait. There is one gas pipeline from Kuala Belait to Bandar Seri Begawan but there are no household connections. All gas is distributed in cylinder form. Domestic consumption of natural gas for 1987 was 39.2 million cubic metres (mcm).

ECONOMIC OVERVIEW

Brunei imports 100% of all its public utilities' equipment. Expenditure on public utilities includes electrical services, water supplies, sanitation, and public facilities.

The Electrical Services Department's annual budget for procurement averages B\$50 million (C\$1:B\$1.54). Capital equipment requirements for infrastructural projects have included electrical apparatus (eg : turbine units, switchgear equipment, line maintenance equipment, distribution boards, electrical insulators) and water pipes.

Actual expenditure by the Electrical Services and Public Works departments in 1988 was B\$71 million and B\$256 million, respectively.

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DIRECTIONAL EMPHASIS OF SECTOR

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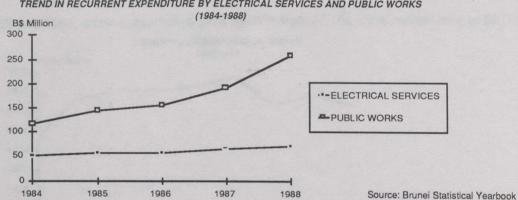
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BACKGROUND

ECONOMIC OVERVIEW



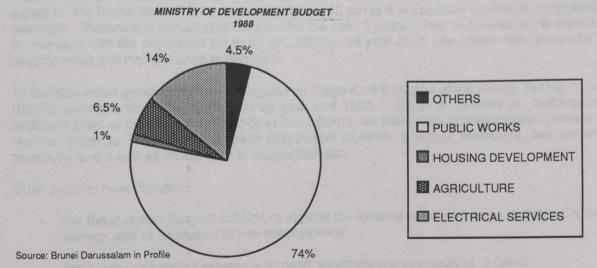
TREND IN RECURRENT EXPENDITURE BY ELECTRICAL SERVICES AND PUBLIC WORKS

Under the 5th Development Plan (1986-1990), the Public Utilities sector was allocated B\$745 million (20% of total development expenditure). This marks a 6% increase in development allocations from the 4th Plan (1980-1984). In 1985, electricity and water supplies accounted for 10% and 8% respectively, of Public Utilities' expenditure.

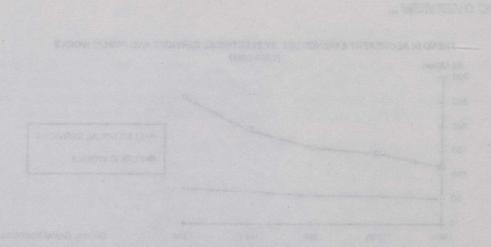
Major electrical and water infrastructural projects concluded in the past several years have included the construction of transformer stations, water treatment plants, reservoirs, and a co-generation plant (Lumut).

CURRENT SITUATION

Under the 1988 budget (B\$621 million) for the Ministry of Development, Public Works (waterworks, bridges, roads, government buildings) received (74%) B\$460 million and Electrical Services, (14%) B\$87 million.



Allocations included funding for Stage 4 of the Sungai Tutong Project which entails the construction of the Benutan Regulating Reservoir. This six stage project is expected to meet national water demand through the year 2010.

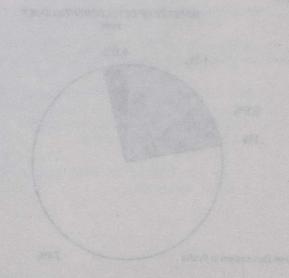


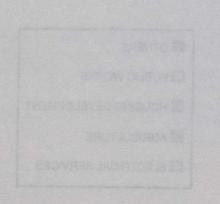
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Allocatorie included funding for Stage 4 or the Sungar Tutong Project which tartals the construction or the containing Regulating Reservoir. The six stage project is expected to areat national water and see instruct the year 2010.

CURRENT SITUATION

Demand for Reservoir and Equipment for Water Distribution

Brunei has the highest per capita water consumption in Southeast Asia. The average Bruneian consumes approximately 450 litres of water per day.

Between 1980 and 1988, water consumption grew by 37% from 37,000 cubic meters (cm) to 50,000 cm.



The capacity of the 5 water treatment plants is as follows: Sumbiling (Temburong) 1.2 million gallon/day (mgd), Tasek (Bandar Seri Begawan) 2.5 mgd, Layong (Tutong) 24 mgd, Seria (Kuala Belait) 8 mgd, Labi (Kuala Belait) 0.3 mgd.

DER CADITA WATER CONSUMPTION

mai substation.	1979-85 Litres/day	1985-95 Litres/day	1996-2005 Litres/day
Urban	432	455	478
Rural	364	387	410

Source : Ministry of Development

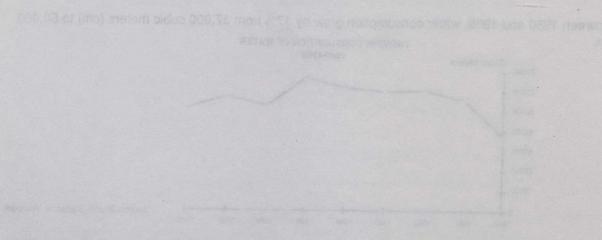
Water rationing, initiated in July 1986, has decreased water consumption by nearly 3%. The water supply to the Brunei-Muara area is restricted from 10 pm to 5 am to allow reservoirs to replenish overnight. Rationing is expected to continue for the next 3 years. Demand, however, is expected to increase with the population set to hit 390,000 by the year 2005 and government programs to develop small and medium sized enterprises.

To facilitate water demand, work is in progress on Stage 4 (of 6 stages) of the Sungai Tutong Project (B\$250 million) and will be completed by year-end 1990. Stage 4 consists of building one treatment plant of capacity of 111 (MI/d) at Bukit Barun, 46 kilometres of transmission pipeline to channel water to 7 reservoirs, a major distribution pipeline, 9 storge reservoirs, two terminal reservoirs, and a new earthfilled dam at Sungai Benutan.

Other projects have included :

- the Belait district Stage 2 scheme to expand the existing treatment works, constructing of a barrage and 11 kilometers of raw water pipeline
- the Temburong district scheme to expand treatment plant capacity to 6 (MI/d)
- the Benutan Project to construct a dam, a tunnel and a reservoir which will hold 44.1 million cu. metres of water.

Demand for Reservoir and Equipment for Writer Distribution scines has the highest per capita water consumation in Southeast Asia. The average Bruness consumes approximately 450 litros of water per day.



The capacity of the 6 values if account plants to as follows. Sumbling (Lambusong) 1'2 million partnings (mrd), Latex (Bancor Sta Regawan) 2.5 mgd, (200mg) 24 mgd, Sena (Suala) P. 2 mgd, Sena (Suala) P. 2 mgd, (200mg) 24 mgd, Sena (Suala)

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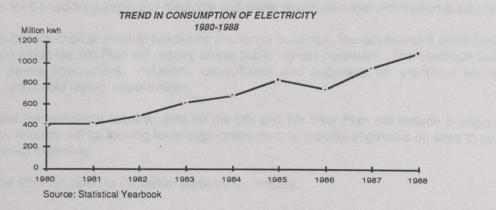
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 - the feature district extreme to expand the import plant capacity to 6 (MIG)
- the Benutan Project to construct a taim, a turnet and a taservoly which will note ea.1 interior

BACKGROUND

CURRENT SITUATION

Demand for Major Infrastructural and Equipment for Electricity

Between 1980 and 1988, total electricity consumption increased more than 150% from 413 million kilowatts/hour (kwh) to 1081 million kwh. The significant consumers of electricity have been households, public buildings and light industry.

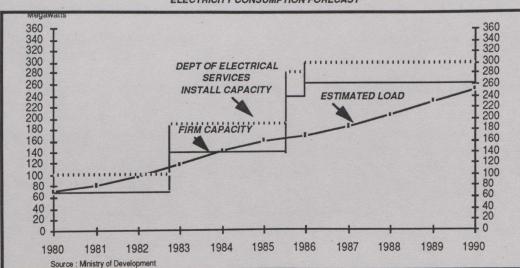


To meet the growing demand for electricity (estimated demand of 250 megawatts (mw) load by 1990), the Electrical Services Department jointly with the Brunei Shell Petroleum (BSP) and Brunei Liquified Natural Gas (BLNG) have constructed a co-generation plant at Lumut consisting of seven 21 mw gas turbine units with waste head boilers.

Other 5th Plan development projects:

- several substations were reinforced
- a 66kv transmission line between Sungai Liang and Lumut was reinforced for higher voltage.
- 11kv substations/network development
- supervisory control
- transmission lines

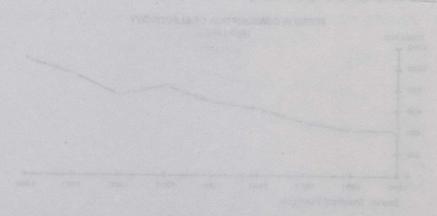
With electricity installation capacity surpassing demand, the market for electrical infrastructural projects will be minimal in the 6th Plan. However, there will be a growing market for replacement parts (e.g. cables, insulated lines), maintenance and repair equipment.



ELECTRICITY CONSUMPTION FORECAST

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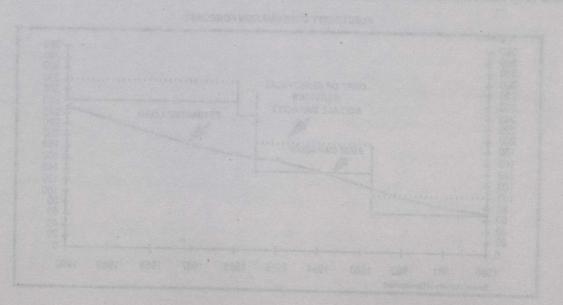
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BACKGROUND

FUTURE TRENDS

The government's long term objective is to supply every citizen with a house. This will mean market opportunities for Canadian suppliers of electrical and water generation and distribution equipment.

Likewise, the construction of several telephone exchange buildings, two government office buildings and a stadium within the 6th Plan will require ample public utilities hardware. The Electrical Services department seeks contractors, installers, consultants and suppliers for electrical wiring, air conditioning, and cable laying opportunities.

Indications are that electrical requirements for the 6th and 7th Year Plan will include 5 engineering projects. The Ministry will be looking for foreign contractors to provide engineers on sites to conduct work and inspect materials.

Projects in the 6th Plan open to Canadian participants include:

- a Supervisory Control and Data Acquisition System (SCADA), to be the central control center in Bandar Seri Begawan to link together the four works control centers.
- an 80 kilometer (km) transmission (B\$200 million) line project.

There are opportunities to supply electrical goods and equipment to some 150 contractors registered with the Electrical Services Department that carry out wiring, cable laying and air conditioning activities.

There will be equipment requirements for ongoing rural water and electrification programs. Opportunities may include the construction of local treatment plants, the extension of pipelines from established plants and laying of overhead lines.

SUNGER DEFENDS

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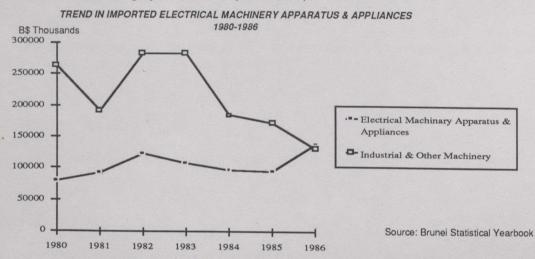
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COMPETITOR ANALYSIS

KEY PARTICIPANTS IN THE ELECTRICAL AND WATER SECTOR

Between 1980 and 1986, capital expended on imported electrical machinery apparatus and appliances has fluctuated. Total expenditure in this category was B\$80,426 in 1980, which dropped between 1984 and 1985, rising by almost 73% (B\$138,343) in 1986.



Development Plan projects use local contractors to undertake small-scale civil engineering and construction infrastructure projects such as pipe and cable laying, while foreign companies undertake specialized projects which require advanced technology and expertise not available locally. Participants within the 5th Year Plan :

- A joint venture company between Summit Grade (Thailand) and K6 (local) supplied water pipes (B\$30 million)
- Swee (local) laid about B\$30 million worth of pipelines
- Team Work, a British and local joint venture, was awarded work on the B\$27 million Layong Water Treatment plant
- Aoki (Japan), Manong (Malaysia), and ANL (local) joint venture was awarded the B\$42 million Benutan Dam.

Competitors for public works projects include: CEBG, John Brown (UK), Mitsubishi (Japan), Fitcher, Siemens (German). Japan is a leading supplier of construction materials.

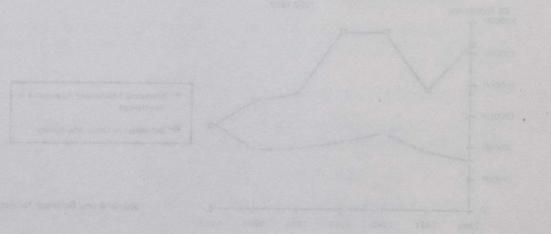
Canadian companies such as Ontario Hydro, Montreal Engineering Company, and Willowglen have submitted proposals for government tenders for an electrical systems control center, and power distribution equipment. Representatives of CIDA, Alberta Government and BBC Boveri (Canada) have also investigated projects.

Monenco was the consultant for the gas-fired electricity plant (B\$300 million) at Lumut commissioned in 1984. Dimex through a local agent, supplied the Sultan's second palace with a building automation system (B\$4 million).

COMPETITOR ANALYSIS

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- Acki "Japan), Minnong (Melaysia), and AML (Loain jour) tentific was average we concerning mercent and any concerning the second s

Competitore for public works projects woulds: OEBG John Brown, (UKS) Masemann (Japann, Musher) Serroos (Celmaco, Jacob is a feeding supplier of constitution in states).

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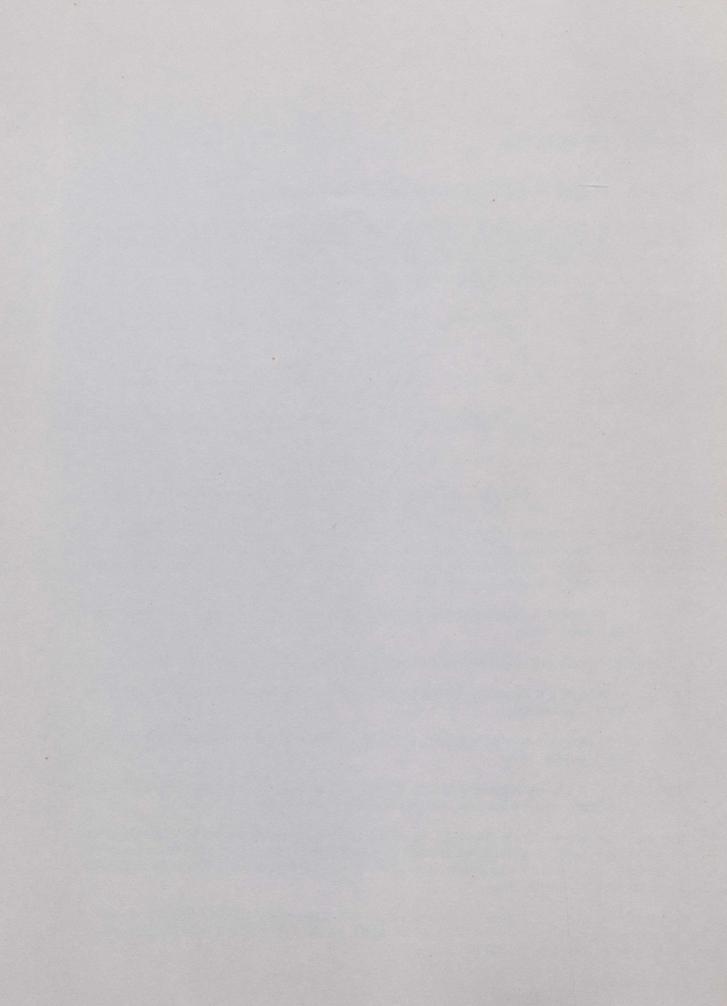
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COMPETITOR ANALYSIS

KEY PARTICIPANTS IN THE ELECTRICAL AND WATER SECTOR ...

Watson Hawxley Asia (UK) has formulated a Master Plan for the Water Department.

Although the tender period is usually 2-3 months, the time period from closure of the project tender to approval by the tender board can range between 2 months to 2 years.

In order to develop the technical expertise of its local manpower, the Ministry actively encourages joint ventures between local and foreign contractors.

KEY CUSTOMERS IN SECTOR

Key electricity and water customers in Brunei are the government and Brunei Shell Petroleum.

CURRENT MARKETING TRENDS

The basic methods for selling generation and distribution equipment for electrical, water and gas services in Brunei :

- tenders/bids for infrastructural projects
- personal relations with senior ministry officials

Valson Hiswatey Asia (UK) has formulated in Master Plan Jor the Water Department

Astrough the render parted is usually 2/3 months, the time period from obsurd of the project tender to estimate the strongent tender board can range between 2 months to 2 years.

In order to develop the technical experies of its local manpower, the Ministry Actively encourages to an unit was been known to the contractors

KEY BUSTOBERS IN SECTOR

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INDUSTRY INCENTIVES AND REGULATIONS

GOVERNMENT REGULATIONS

All electrical equipment is subject to 20% import duty. Industrial equipment procured through the government is exempt from duty.

LOCAL PREFERENCE POLICY

The government maintains 100% control of public utilities services.

NOUSTRY INCENTIVES AND RECULATIONS

COVERNMENT REGULATIONS

All electrical equipment is subject to 20% import duy. Industrial equipment procured through the connected is even of from duty.

LOCAL PREPERENCE POLICY

This coveriment maintains 100% common of public clubics secondes

SECTORAL ANALYSIS - BRUNEI PUBLIC UTILITIES INDUSTRY

APPENDICES March 1990

SRI International Southeast Asia & South Pacific Regional Headquarters

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SECTORAL ANALYSIS - BRUNEI PUBLIC UTILITIES INDUSTRY

APPENDICES March 1930

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KEY BUSINESS AND GOVERNMENT CONTACTS

GOVERNMENT AGENCIES IN BRUNEI

Economic Development Board

Ministry of Finance Bandar Seri Begawan 2012 Negara Brunei Darussalam Telephone : (02) 41991

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Ministry of Defence

Bandar Seri Begawan Negara Brunei Darussalam Telephone : (02) 30531 Facsimile : (02) 30395 Contact : *MG Pengiran Haji Ibnu -* Deputy Minister *Dato Paduka Haji Mohmd Alimin -* Permanent Secretary Administration

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- Minster of Education

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> Observe Observer of Commerce Forma 502-504 Gook Toe Building 99-67 Jalan McAshing 9-0, Bez 291 Japider San Begarien 1979 Telephone (05) 22233

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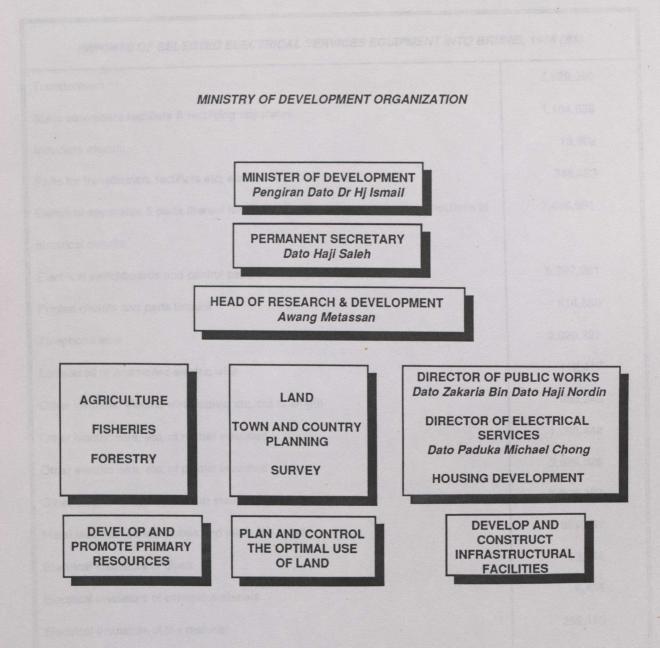
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OTHER TAX INCENTIVES ADMINISTERED BY ECONOMIC DEVELOPMENT BOARD

OTHER TAX INCENTIVES ADMINISTERED BY ECONOMIC DEVELOPMENT BOARD					
ax Incentives	Tax Concession				
Pioneer Status	A. Exemption of the 30% corporate tax for a pioneer status company from the day it commences production:				
	Fixed Capital Tax Exemption Expenditure Period				
	Up to B\$250,000 2 years				
	B\$250,000- B\$500,000 3 years				
	B\$500,000 - B\$1 million 4 years Over B\$1 million 5 years				
	 B. Exemption from customs duty on plant, machinery, old equipment installed in the pioneer factory. 				
	C. Exemption from import duty on raw materials (not available or produced in Brunei) for production of pioneer products.				
Expansion of established institutions	New Capital Expenditure:Tax ExemptionRequirementPioneerLess than B\$258,000:3 yearsOver B\$250,000:5 years				
Foreign Lenders	Exemption of 20% withholding tax on interest paid to non-resident lenders if				
	 the loan utilized for the purchase of productive equipment 				
	 the credit facilities are obtained through financial agreement with the foreign lending company 				
	 the amount of loan is not less than B\$200,000 				

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IMPORTS OF SELECTED ELECTRICAL SERVICES EQUIPMENT INTO BRUNEI, 1986 (B\$)					
Transformers	6,526,380				
Static converters rectifiers & rectifying apparatus	1,104,528				
Inductors electric	13,802				
Parts for transformers rectifiers etc, electric	348,423				
Electrical apparatus & parts thereof for breaking, protecting or making connections in	7,436,961				
electrical circuits					
Electrical switchboards and control panels and parts thereof	5,397,281				
Printed circuits and parts thereof	614,650				
Telephone wire	2,020,327				
Lacquered or enamelled electric wire	112,417				
Other insulated electric wire cables, etc, cut to length	680,346				
Other electric wire, etc, of rubber insulated	1,095,448				
Other electric wire, etc, of plastic insulated	3,825,026				
Other electric wire, etc, of other insulated	5,938,187				
Metal electrical conduit tubes and joints insulated	388,991				
Electrical insulators of glass	13,416				
Electrical insulators of ceramic materials	6,455				
Electrical insulators of the material	259,165				
Insulating fittings of glass for electrical machines	2,369				
Insulating fittings of ceramic materials for electrical machines	1,826				

APPENDIX N

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SUPPLIERS OF ELECTRICAL EQUIPMENT REPRESENTED IN BRUNEI

<i>S/N</i>	BRAND/MAKE	TYPE OF PRODUCT/SYSTEM	COUNTRY OF ORIGIN
1	Klockner Moeller	Low voltage switchgears, distribution system and components, industrial electronic controls	West Germany
2	Dimax Controls	Energy management and control systems, building automation systems, interface devices	Canada
3	Electrak	Low Voltage Distribution System and components	United Kingdom
4	Diversitec	CORVUS Local Area Networks, application software packages, computers, printers and other peripheral devices	United States
5	Philips	Lighting systems, communication systems and all Philips product line	Holland
6	Thelma Engineering	Uninterruptable Power Supply (UPS) systems and various related products	United States/Japan
7	Polaron	Light Dimming Systems (simple manual type to computerized type) and Building Automation System	United Kingdom
8	Senstar	SENTRAX, PANTHER, SENSCAN perimeter security system	Canada
9	RAAK	Lighting systems	Holland
10	Marlin	Lighting systems	United Kingdom
11	Ontario Hydro	Scada System, EHV Transmission Project	Canada
12	Graphtec	Digitizers and plotters for Computer Aided Engineering/Design (CAE/CAD)	Japan
13	Roman Fountains	Fountain equipment and systems design	America
14	Sanyo	Uninterruptible Power Supply (UPS) and other power supply regulating equipment	Japan

APPENDIXY

LIST OF WHOLESALERS & DISTRIBUTORS FOR ELECTRICAL SUPPLIES

AEC Airconditioning & Engineering (Sdn) Bhd P O Box 2666 Bandar Seri Begawan 1926 4 Blk G 1st Fl Chandrawaseh Shopping Complex Telephone : (02) 28274

Airecool Building Services Sdn Bhd P O Box 961 Bandar Seri Begawan 3109 6 Spg 608 km 7 Jalan Tutong Telephone : (02) 50116

Amcol Electrical Industries Ltd 1E Lorong Tukang Lima Singapore Telephone : (65) 2617951

Band-It (Asia) Pte Ltd 73 Blk 19 Pandan Loop Singapore 0512 Telephone : (65) 7790277

Bobby Electrical Co Sdn Bhd P O Box 2506 Bandar Seri Begawan 1925 A6 Bang Hj Othman Telephone : (02) 22810

Crompton Instruments (SEA) Pte Ltd 3555 Ang Mo Kio Industrial Park 2 Singapore 2056 Telephone : (65) 4818866

Everlee & Co P O Box 1011 Bandar Seri Begawan 1910 113 1st Fl Bang Kumbang Pasang Telephone : (65) 29427

Hellermann Asean Pte Ltd Block 4008 Ang Mo Kio Ind Pk 1, #01-19/20 Singapore 2056 Telephone : (65) 4567078

Holland-Asia Engineering Co Pte Ltd #03-08 Pek Chuan Building Singapore Telephone : (65) 2928911 Hoo Ping Trading Co P O Box 203 K Belait 6002 102 Jln McKerron KB Telephone : (03) 34628

Intan Electric Co Bhd P O Box 1735 Bandar Seri Begawan 1917 27F Km 6.3/4 Jalan Tutong Telephone : (02) 51782

Li Soon Moulding & Metal Works Pte Ltd 29 Kian Teck Way Singapore Telephone : (65) 2689177

Marine & Industrial Electricals Pte Ltd Blk 69 Bedok South Avenue 3, #01-498 Singapore 1646 Telephone : (65) 4450739

Million Electric Co Pte Ltd11 Kallang Way 5SingaporeTelephone:(65) 7433033

New Prosperity Electrical (Pte) Ltd 25 Pioneer Road North #01-127 Singapore Telephone : (65) 2641100

Seen Joo Co #07-36 Golden Mile Complex Singapore Telephone : (65) 2982424

Warine Electric Co Pte Ltd 18 Penjuru Road Singapore 2260 Telephone : (65) 2659811

Whitley Trading Co P O Box 478 K Belait 6004 Lot 4127 Jalan Lubok Jelutong KB Telephone : (03) 32696

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> Alt some Laiding Services Star End P. O'Ros son Barras, Benut gawan 3109 Sing 598 km 1 Jahn Tupong Telephone (22 p0118

Amool Shettigal Industries Lis Corong Tukang Isma Singagore Teesphone (66) 2617321

Band-2 (Apia) Pite Lid Pite 19 Pandan Loop Singapora 0812 Talaphone (65) 7790

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Evenies & Co F. C.B. (011 Bardat Sen Begawan (C10 110 (s) Pi Barg Kumbang Pasarig Taleptone (65) 29427

Hark menne Arean Pre Ltd Noce 6008 800 Mid Mid and Pk 1 601-1920 Shoreome 7056 Mid Mid Mid (65) 4587676

Hollun-Actia Brightaering Co Pie Lid 193-53 Pak Chuen Building Scommas Scommas 101, nead

Pool Prag Trading Co PO Box Sos is Batal 8002 M32 din MOKenen KS Felapione (031 34603

intan Electric Co Bid P O Box 1735 Barnar Sen Begavan 1917 275 Km 6.3M Jelan Tulang Tetochong (02) 51782

Li Soon Mouloung & Malar Works Pir Lis 23 Nest Teck Vieg Sincappie Tabatesia

Marena & Industrial Electricals Pre Ltd 18 63 Sadok Socth Avenue 2, 401-498 Mingapore 1946, Istephone (65) 4450709

10 Mion Electric Co Pie Lis 11 Kalang Way 5 Singsooro Telechona : (65) 7483033

New Prospanity Electricae (Pla) Ltd *25 Paneae Road North #01-127 Singapata Telescrana 1 (bd) 2541100

Seen Juid Co #07-56 Clotdon MRe Complex SingRoom Feleptene (85) 2082424

Martina Bladiric CO Pta Lid 18 Penjuru Road Singapura 2205 Talapicura (65) 255951

Hindday Thatlog Co P G Box 473 K Batet 8004 Lat 8127 Jalan Lubok Jekinong KB Talophone (103) 32896

LIST OF WHOLESALERS & DISTRIBUTORS OF WATER TREATING SERVICE & EQUIPMENT

Coastal Equipment (S) Pte Ltd 26 Benoi Road Singapore Telephone : (65) 8617133

Fiesta Sdn BhdUnit 3-4-5 5th Fl Badiah ComplexBandar Seri BegawanTelephone:(02) 41397

Macliz Media Industries Sdn Bhd 64A Psiarn Greenhill IP Malaysia Telephone : (05) 530054

Sulaiman Development Services Sdn Bhd Blk G-6 1st Fl Chandrawaseh Shopping Complex Bandar Seri Begawan Telephone : (02) 26711

Weei Ta Engineering & Construction 10 Spg 31 Jalan Gadong Telephone : (02) 28253 和户内后以已有乌人

Cosetal Equipment (3) Pla Ltd 16 Renol Read singapore Historicka : (65) 261713

Freese Schr Bhd Urat 3-4-5 Sin Fi Badach Complex Bandar Sin Begawan Tobrione (02) 4139

Advite Marete Industrion Sam Uno AAA Pairan Greenbill IP Advinessis Freephone (CS) 530

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