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SECTORAL ANALYSIS - BRUNEI
PUBLIC UTILITIES INDUSTRY

March 1990

SRI International
Southeast Asia & South Pacific
Regional Headquarters

Project #7895

Dept. of External Affairs
Min. des Affaires extérieures

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SECTORAL ANALYSIS - BRUNEI PUBLIC UTILITIES INDUSTRY

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Regional Headquarters

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.

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.

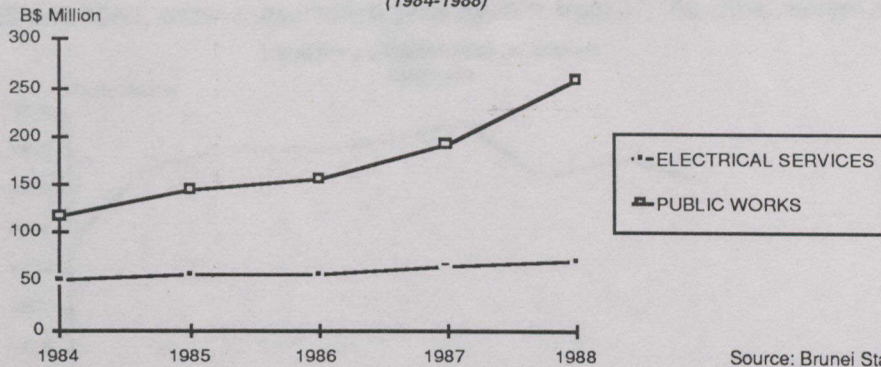
The Electrical Services Department's annual budget for procurement averages B\$50 million (C\$1:B\$1.54). Capital equipment requirements for infrastructural projects have included electrical apparatus (eg : turbine units, switchgear equipment, line maintenance equipment, distribution boards, electrical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

BACKGROUND ...

ECONOMIC OVERVIEW ...

TREND IN RECURRENT EXPENDITURE BY ELECTRICAL SERVICES AND PUBLIC WORKS (1984-1988)



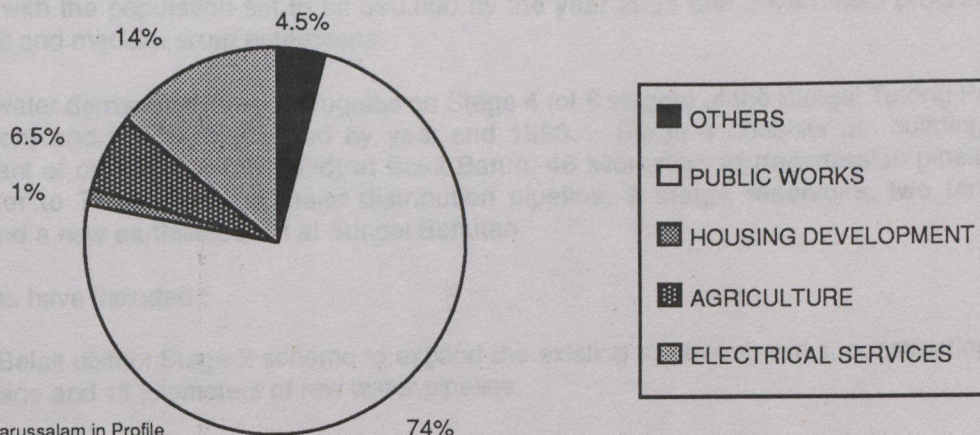
Under the 5th Development Plan (1986-1990), the Public Utilities sector was allocated B\$745 million (20% of total development expenditure). This marks a 6% increase in development allocations from the 4th Plan (1980-1984). In 1985, electricity and water supplies accounted for 10% and 8% respectively,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

MINISTRY OF DEVELOPMENT BUDGET 1988



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.

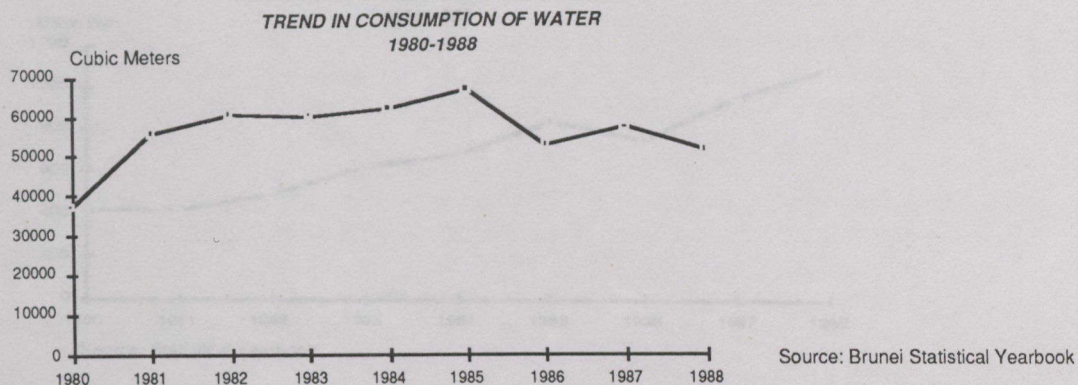
BACKGROUND ...

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.

PER CAPITA WATER CONSUMPTION

	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 storage reservoirs, two terminal reservoirs, and a new earthfilled dam at Sungai Benutan.

Other projects have included :

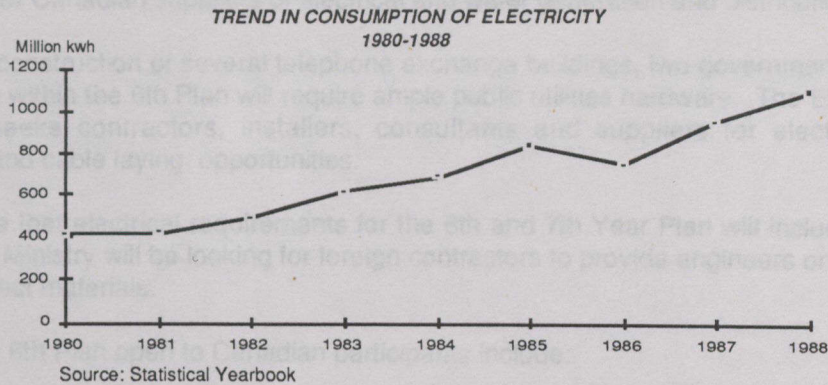
- the Belait district Stage 2 scheme to expand the existing treatment works, constructing of a barrage and 11 kilometers of raw water pipeline
- the Temburong district scheme to expand treatment plant capacity to 6 (MI/d)
- the Benutan Project to construct a dam, a tunnel and a reservoir which will hold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

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.

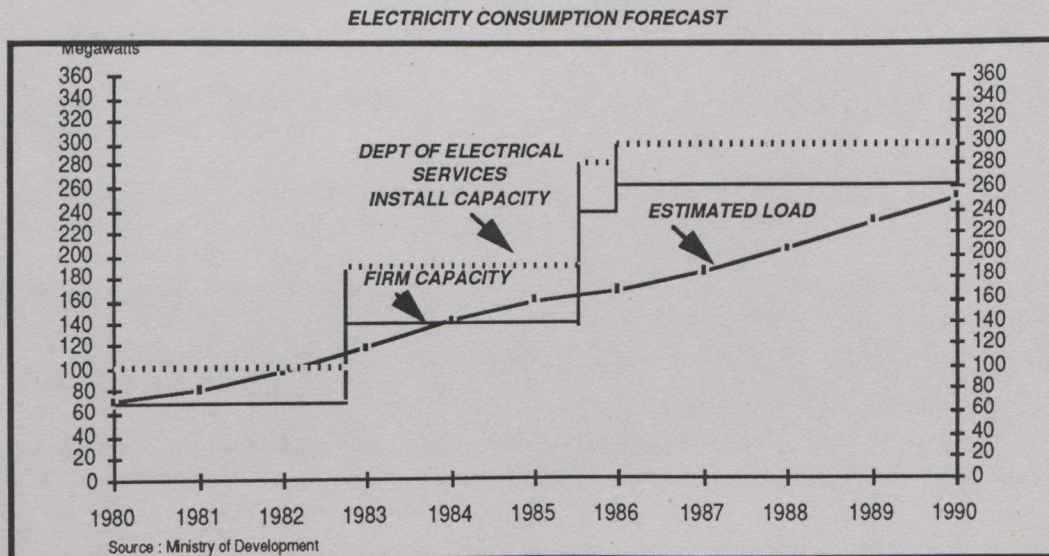


To meet the growing demand for electricity (estimated demand of 250 megawatts (mw) load by 1990), the Electrical Services Department jointly with the Brunei Shell Petroleum (BSP) and Brunei Liquefied Natural Gas (BLNG) have constructed a co-generation plant at Lumut consisting of seven 21 mw gas turbine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



BACKGROUND ...

COMPETITOR ANALYSIS

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.

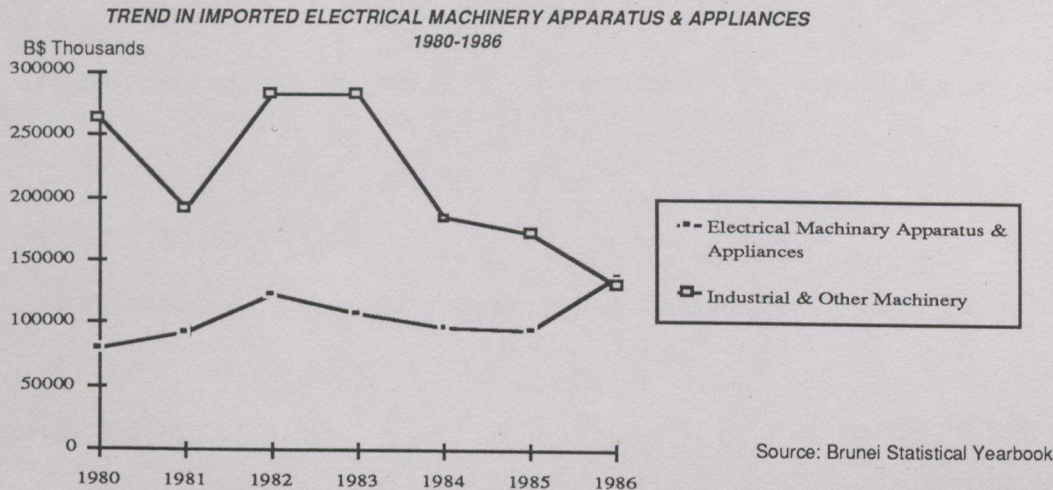
There are opportunities to supply electrical goods and equipment to some 150 contractors registered with the Electrical Services Department that carry out wiring, cable laying and air conditioning activities.

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.

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 ...

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

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.

APPENDICES
March 1990

South East Asia & South Pacific
Regional Roadways

Project #7895

GENERAL BUSINESS ASSOCIATIONS

Brunei Malay Chamber of Commerce and Industry
Suite 411
Petronas Tower, Jalan Sultan Haji
Jaya, Bandar Seri
Begawan, Brunei
Telephone: (850) 235-2200
Fax: (850) 235-2201

**SECTORAL ANALYSIS - BRUNEI
PUBLIC UTILITIES INDUSTRY**

Brunei Chamber of Commerce
Suite 411, Petronas Tower, Jalan
Sultan Haji, Bandar Seri
Begawan, Brunei
Telephone: (850) 235-2200

INDUSTRY SPECIFIC DEPARTMENTS

Department of Electrical Services
Ministry of Development
Petronas Tower, Suite 411
Jalan Sultan Haji, Bandar Seri
Begawan, Brunei
Telephone: (850) 235-2200
Fax: (850) 235-2201
Department of Public Works
Ministry of Development
Petronas Tower, Suite 411
Jalan Sultan Haji, Bandar Seri
Begawan, Brunei
Telephone: (850) 235-2200

**APPENDICES
March 1990**

SRI International
Southeast Asia & South Pacific
Regional Headquarters

Project #7895

GOVERNMENT AGENCIES IN BRUNEI

Economic Development Board

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

Ministry of Industry and Primary Resources

Bandar Seri Begawan 1220
 Brunei Darussalam
 Negara Brunei Darussalam
 Telephone : (02) 44822
 Contact :

Pehin Dato Dr Haji Abdul Rahman

- Minister of Industry & Primary Resources

Economic Planning Unit

Ministry of Finance
 Bandar Seri Begawan 2012
 Negara Brunei Darussalam
 Telephone : (02) 41991
 Facsimile : (02) 26132
 Contact :

Chua Peng Siong - Assistant Director

Datin Lawe - Head

Ministry of Development

Bandar Seri Begawan 1200
 Negara Brunei Darussalam
 Telephone : (02) 41911
 Facsimile : (02) 42298
 Contact :

Pengiran Dato Dr Haji Ismail - Minister of Development

Majid Alias - Secretary

Ministry of Communication

Bandar Seri Begawan 1150
 Negara Brunei Darussalam
 Telephone : (02) 26640
 Facsimile : (02) 20445
 Contact :

Dato Haji Zakaria - Minister of Communications

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

Ministry of Education

Old Airport
 Bandar Seri Begawan
 Brunei Darussalam
 Telephone : (02) 41511
 Facsimile : (02) 40250
 Contact :

Pehin Dato Haji Abdul Aziz -

- Minister of Education

GENERAL BUSINESS ASSOCIATIONS

Brunei Malay Chamber of Commerce and Industry

Suite 411
 Bangunan Guru-Guru Melayu Brunei
 Jalan Kianggeh
 P.O. Box 1099

Bandar Seri Begawan 1910
 Telephone : (02) 27297/20649
 Telex : BU 2445

Brunei Darussalam State Chamber of Commerce

P O B 2246 Bandar Seri Begawan 1922
 Telephone : (02) 28533

Chinese Chamber of Commerce

Room 502-503, Golk Tee Building
 66-67 Jalan McArthur
 P.O. Box 281
 Bandar Seri Begawan 1902
 Telephone : (02) 22233

INDUSTRY SPECIFIC DEPARTMENTS

Department of Electrical Services

Ministry of Development
 Bandar Seri Begawan 1200
 Negara Brunei Darussalam
 Telephone : (02) 42090
 Contact :

Haji Samad - Asst Director of Water

Department of Public Works

Ministry of Development
 Bandar Seri Begawan 1200
 Brunei Darussalam
 Telephone : (02) 41911

OTHER TAX INCENTIVES ADMINISTERED BY ECONOMIC DEVELOPMENT BOARD

OTHER TAX INCENTIVES ADMINISTERED BY ECONOMIC DEVELOPMENT BOARD											
Tax Incentives	Tax Concession										
<ul style="list-style-type: none"> Pioneer Status 	<p>A. Exemption of the 30% corporate tax for a pioneer status company from the day it commences production:</p> <table> <thead> <tr> <th>Fixed Capital Expenditure</th> <th>Tax Exemption Period</th> </tr> </thead> <tbody> <tr> <td>Up to B\$250,000</td> <td>2 years</td> </tr> <tr> <td>B\$250,000- B\$500,000</td> <td>3 years</td> </tr> <tr> <td>B\$500,000 - B\$1 million</td> <td>4 years</td> </tr> <tr> <td>Over B\$1 million</td> <td>5 years</td> </tr> </tbody> </table> <p>B. Exemption from customs duty on plant, machinery, old equipment installed in the pioneer factory.</p> <p>C. Exemption from import duty on raw materials (not available or produced in Brunei) for production of pioneer products.</p>	Fixed Capital Expenditure	Tax Exemption 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
Fixed Capital Expenditure	Tax Exemption Period										
Up to B\$250,000	2 years										
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B\$500,000 - B\$1 million	4 years										
Over B\$1 million	5 years										
<ul style="list-style-type: none"> Expansion of established institutions 	<table> <tbody> <tr> <td>New Capital Expenditure Requirement</td> <td>:</td> <td>Tax Exemption Pioneer</td> </tr> <tr> <td>Less than B\$258,000</td> <td>:</td> <td>3 years</td> </tr> <tr> <td>Over B\$250,000</td> <td>:</td> <td>5 years</td> </tr> </tbody> </table>	New Capital Expenditure Requirement	:	Tax Exemption Pioneer	Less than B\$258,000	:	3 years	Over B\$250,000	:	5 years	
New Capital Expenditure Requirement	:	Tax Exemption Pioneer									
Less than B\$258,000	:	3 years									
Over B\$250,000	:	5 years									
<ul style="list-style-type: none"> Foreign Lenders 	<p>Exemption of 20% withholding tax on interest paid to non-resident lenders if</p> <ul style="list-style-type: none"> 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 										

MINISTRY OF DEVELOPMENT ORGANIZATION

MINISTER OF DEVELOPMENT
Pengiran Dato Dr Hj Ismail

PERMANENT SECRETARY
Dato Haji Saleh

HEAD OF RESEARCH & DEVELOPMENT
Awang Metassan

AGRICULTURE
FISHERIES
FORESTRY

DEVELOP AND PROMOTE PRIMARY RESOURCES

LAND
TOWN AND COUNTRY PLANNING
SURVEY

PLAN AND CONTROL THE OPTIMAL USE OF LAND

DIRECTOR OF PUBLIC WORKS
Dato Zakaria Bin Dato Haji Nordin
DIRECTOR OF ELECTRICAL SERVICES
Dato Paduka Michael Chong
HOUSING DEVELOPMENT

DEVELOP AND CONSTRUCT INFRASTRUCTURAL FACILITIES

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 electrical circuits	7,436,961
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

SUPPLIERS OF ELECTRICAL EQUIPMENT REPRESENTED IN BRUNEI

S/N	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

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 Ltd
 11 Kallang Way 5
 Singapore
 Telephone : (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

**LIST OF WHOLESALERS & DISTRIBUTORS OF WATER TREATING
SERVICE & EQUIPMENT**

Coastal Equipment (S) Pte Ltd

26 Benoi Road

Singapore

Telephone : (65) 8617133

Fiesta Sdn Bhd

Unit 3-4-5 5th Fl Badiah Complex

Bandar Seri Begawan

Telephone : (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

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Weei Ta Engineering & Construction

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Telephone : (02) 28253

