



MALAYSIA'S PETROCHEMICAL INDUSTRY: POISED FOR STRATEGIC GROWTH



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UPSTREAM TRANSFORMATIONS SPURRING DOWNSTREAM SUSTAINABILITY

Malaysia's petrochemical industry is re-focusing its efforts towards embracing digitalisation, technology advancement using automation and robotics, a skilled workforce and creative partnerships to redefine itself. The industry is poised for transformation and diversification to better adapt to growing global energy transition trends while remaining competitive.

Backed by abundant oil and gas reserves and petrochemical feedstocks, Malaysia's petrochemical industry boasts 45 years of solid fundamentals. It is an important growth area with an established infrastructure, available feedstock, matured supporting industries and smart partnerships with some of the world's largest MNCs through the continued support

of the Government and Petroliaam Nasional Berhad (PETRONAS), the national oil and gas company. The local petrochemical industry is well diversified, producing a wide range of products through strategic joint ventures with foreign MNC giants such as Hengyuan (formerly known as Shell Refining), Petron, BASF, Lotte Chemical Titan, Idemitsu, Toray Group, Penfibre, Kaneka, Eastman Chemicals, Eternal, Polyplastic, UPC Group, Recron, Synthomer, Dairen, Mitsui and Reliance Group.

Potential investors can expect to reap returns from existing integrated petrochemical complexes offering centralised utilities, efficient storage services, and a comprehensive transportation network that collectively help reduce capital and operational costs, thus positioning Malaysia as one of ASEAN's promising strategic investment locations. The wide range of tax incentives to meet the varying needs of investors is also another attraction.



A QUICK PEEK AT MALAYSIA'S OIL & GAS REFINERIES, PLANTS AND FACILITIES

Malaysia has a well-established O&G infrastructure with over 3,500 oil and gas businesses in operation, including international oil companies, independents, service providers and equipment manufacturers. This well-oiled machine includes refineries, gas processing plants, regasification terminals and LNG facilities.

OIL REFINERIES IN PENINSULAR MALAYSIA 6 Oil Refineries in Malaysia



GAS PROCESSING PLANTS (GPP) IN MALAYSIA

Natural gas forms the backbone of Malaysia's petrochemical industry, extending the country's industrial capabilities further downstream in the oil and gas value chain. Six processing plants located in Kerteh and Santong, Terengganu, with a combined capacity of 2,060 million standard cubic feet per day (mmscfd), ensure there is an adequate supply of petrochemical feedstocks such as methane (sales gas), ethane, propane, butane and condensates to meet demands.

By forging partnerships with other ASEAN countries such as Thailand (Malaysia-Thailand Joint Development Area), Vietnam and Indonesia for gas supplies, along with the ongoing implementation of the ASEAN gas grid to make gas available to all 10 ASEAN member countries, Malaysia is ensuring the future security of gas supply to complement its existing gas reserves.

Meanwhile, Malaysia's Peninsular Gas Utilisation (PGU) runs a 1,690 km long pipeline network to users.

REGASIFICATION TERMINALS IN MALAYSIA

NO.	REGASIFICATION TERMINAL	COMPANY	CAPACITY (MMSCFD)
1	LNG Regasification Terminal Sungai Udang (RGTSU), Melaka	Regas Terminal (Sg Udang) Sdn. Bhd.	500
2	LNG Regasification Terminal Pengerang (RGTP), Johor	Pengerang LNG (Two) Sdn. Bhd.	490
TOTAL			990

LIQUEFIED NATURAL GAS (LNG) FACILITIES IN MALAYSIA		
NO.	LNG PLANT	CAPACITY (MTPA)
1	Malaysia LNG Sdn. Bhd. (MLNG Satu)	8.4 million
2	Malaysian LNG Dua Sdn. Bhd. (MLNG Dua)	9.6 million
3	Malaysia LNG Tiga Sdn. Bhd. (MLNG Tiga)	7.7 million
4	PETRONAS LNG 9 Sdn. Bhd. (PL9SB)	3.6 million
SUB-TOTAL		29.3 million
5	PETRONAS Floating LNG Satu (PFLNG Satu)	1.2 million
6	PETRONAS Floating LNG Satu (PFLNG Dua)	1.5 million
TOTAL		32.0 million

PETROCHEMICAL PRODUCTS IN MALAYSIA

PETROCHEMICAL PRODUCTS	COMPANY/ REFINERY
> Naphtha	<ul style="list-style-type: none">• Petronas Penapisan (Terengganu) Sdn. Bhd.• Malaysian Refining Company Sdn. Bhd.• Hengyuan Refining Company Berhad• Petron Malaysia Refining & Marketing Bhd.• Kemaman Bitumen Company Sdn. Bhd.• Pengerang Refining Company Sdn. Bhd.
> Ethane > Propane > Butane	<ul style="list-style-type: none">• Petronas Gas Berhad
> Ethylene	<ul style="list-style-type: none">• Lotte Chemical Titan (M) Sdn. Bhd.• Petronas Chemicals Ethylene Sdn. Bhd.• Petronas Chemicals Olefins Sdn. Bhd.• Pengerang Refining Company Sdn. Bhd.
> Propylene	<ul style="list-style-type: none">• Lotte Chemical Titan (M) Sdn. Bhd.• Petronas Chemicals MTBE Sdn. Bhd.• Petronas Chemicals Olefins Sdn. Bhd.• Pengerang Refining Company Sdn. Bhd.

PETROCHEMICAL PRODUCTS	COMPANY/ REFINERY
> Butadiene	<ul style="list-style-type: none">• Pengerang Refining Company Sdn. Bhd.• Lotte Chemical Titan (M) Sdn. Bhd.
> Methyl Tertiary Butyl Ether (MTBE)	<ul style="list-style-type: none">• Pengerang Refining Company Sdn. Bhd.• Petronas Chemicals MTBE Sdn. Bhd.
> Methanol	<ul style="list-style-type: none">• Pengerang Refining Company Sdn. Bhd.• Petronas Chemicals Methanol Sdn. Bhd.• BASF PETRONAS Chemicals Sdn. Bhd.
> Polypropylene (PP) > Linear Low-Density Polyethylene (LLDPE) > High Density Polyethylene (HDPE)	<ul style="list-style-type: none">• Pengerang Petrochemical Company Sdn. Bhd.• Lotte Chemical Titan (M) Sdn. Bhd.
> Mono Ethylene Glycol (MEG) > Di Ethylene Glycol (DEG) > Tri Ethylene Glycol (TEG) > Heavy Glycol (HG)	<ul style="list-style-type: none">• Pengerang Petrochemical Company Sdn. Bhd.

PETROCHEMICAL PRODUCTS	COMPANY/ REFINERY
> Ethylene Oxide > Ethylene Glycol	<ul style="list-style-type: none">• Petronas Chemicals Glycols Sdn. Bhd.
> Ethanolamines > Alkoxylates / Functional Fluids > Butanol > Butyl Acrylate > Glycols Ethers > Butyl Acetate	<ul style="list-style-type: none">• Petronas Chemicals Derivatives Sdn. Bhd.
> Benzene > Toluene > Xylene > Raffinate 2	<ul style="list-style-type: none">• Lotte Chemical Titan (M) Sdn. Bhd.• Petronas Chemicals Aromatics Sdn. Bhd.• Pengerang Refining Company Sdn. Bhd.
> Isononanol > C8 Hydrocarbons > C12 Olefins > C16 Olefins > Raffinate 3 > Oxo Oil 9N	<ul style="list-style-type: none">• Petronas Chemicals Isononanol Sdn. Bhd.

HOME TO WORLD CLASS PETROCHEMICAL ZONES AND FACILITIES

KERTIH, TERENGGANU



Kertih is the operations base for PETRONAS' oil platform operations offshore Terengganu, petrochemicals production and crude oil refining in nearby Paka. As an industry specific development, Kertih's transformation from a quiet and sleepy fishing village to a top-notch petrochemical hub was finally completed with the set-up of the PETRONAS Petroleum Industry Complex (PPIC), which links the entire range of the oil and gas value chain - beginning from upstream exploration and production to the final stage of petrochemical manufacturing.

Located within the PPIC is PETRONAS' Integrated Petrochemical Complex (IPC), which mainly consists of ethylene-based petrochemical plants.

FACILITIES AND INFRASTRUCTURE

- Gas Processing Plants
- Peninsular Gas Utilisation (PGU) project
- Centralised Utility Facilities
 - Supply of utilities such as power, industrial gases, water and steam
- Institut Teknologi Petroleum PETRONAS (INSTEP) (located in Kuala Terengganu)
 - Training centre
- Kertih Port
 - Mainly bulk liquid port, handling some 2.5 million tonnes of chemical liquid and gasses
 - Vessel services
 - Tank storage (bulk chemical in 41 storage tanks)
 - Truck services
 - Drumming

PETROCHEMICAL PRODUCTS PRODUCED IN KERTIH:

- | | |
|----------------|--------------------|
| ➤ Paraxylene | ➤ Ethoxylates |
| ➤ Benzene | ➤ Glycol Ethers |
| ➤ Ammonia | ➤ Butanol |
| ➤ Acetic Acid | ➤ Butyl Acetate |
| ➤ Ethylene | ➤ Ethylene Oxide |
| ➤ Polyethylene | ➤ Ethylene Glycols |
| ➤ Propylene | |
| ➤ Ethanolamine | |



GEBENG, PAHANG



The Gebeng Industrial Estate zone is another petrochemical hub for world-renowned petrochemical companies like BASF, Reliance Group, Kaneka, Eastman, and Polyplastics. This industrial estate complements the Gebeng Integrated Petrochemical Complex (IPC), meeting the specific needs of the petrochemical industry.

FACILITIES AND INFRASTRUCTURE

- Peninsular Gas Utilisation (PGU) project
- Centralised Utility Facilities
 - Supply of utilities such as power, industrial gases, water and steam
- Kuantan Port
 - Centralised tankage facilities
 - Pipeline and piperack system connecting Gebeng to Kuantan Port
 - Container and bulk liquid port
 - Railway linking Kertih, Gebeng and Kuantan Port
 - Cargo handling
 - Marine services (pilotage and towage)
 - Free zone
- East Coast Highway

PETROCHEMICAL PRODUCTS PRODUCED IN GEBENG:

- | | |
|---------------------------------------|---|
| ➤ Acrylic Acid | ➤ Propylene |
| ➤ Syngas | ➤ Polyacetals |
| ➤ Butyl Acrylate | ➤ Polybutylene Terephthalate (PBT) |
| ➤ 2-Ethyl Hexyl Acrylate | ➤ N-Butane |
| ➤ Oxo-alcohols | ➤ Butyl Acetate |
| ➤ 2-Ethyhexanol | ➤ DL-Isopulegol |
| ➤ Phthalic Anhydride and Plasticisers | ➤ 2-Ethylhexanoic acid |
| ➤ Butanediol | ➤ Highly reactive polyisobutylene |
| ➤ Tetrahydrofurane | ➤ Isoprenol, Citral, Citronellol, Menthol, Energol-Me & Energol-C |
| ➤ Gamma-butyrolactone | ➤ N-Butyraldehyde |
| ➤ Polyester Copolymers | |
| ➤ Purified Terephthalic Acid (PTA) | |
| ➤ Dispersion Polyvinyl Chloride | |
| ➤ Methyl Methacrylates Copolymers | |
| ➤ Methyl Tertiary Butyl Ether (MTBE) | |



PASIR GUDANG TANJUNG LANGSAT, JOHOR

The Pasir Gudang Industrial Park, located next to the Johor Port, is an established industrial area with a comprehensive range of industries including petrochemicals. To meet the needs of a growing petrochemical industry, the adjacent Tanjung Langsat Industrial Complex (TLIC) site was developed to further enhance manufacturing capacity.

Spanning a total area of 4,835 acres, the TLIC is a modern integrated industrial park specifically designated for heavy industries.

PETROCHEMICAL PLANTS IN PASIR GUDANG-TANJUNG LANGSAT:

- Ethylene
- Propylene
- Benzene, Toluene, Xylene (BTX)
- Polyethylene
- Polypropylene
- High Impact Polystyrene
- Ethylbenzene
- Styrene Monomer
- Expandable Polystyrene
- Ethylene Vinyl Acetate
- Styrene butadiene rubber
- Styrene acrylics & full acrylics

FACILITIES AND INFRASTRUCTURE

- Peninsular Gas Utilisation (PGU) project
- Tank farms for bulk storage of liquid petrochemicals
- Johor Port
 - Strategically positioned in the heart of the sprawling 8,000-acre Pasir Gudang Industrial Estate
 - With berths of almost 2.4 km, the port provides liquid bulk, dry bulk, general cargo (breakbulk) and container services
 - Three hazardous liquid bulk terminals to handle LPG, chemicals and petrochemicals
 - Container terminal
 - Free zone
- Tanjung Pelepas Port
 - A world-class container port
 - Free zone
 - Marine services (pilotage, towage and freshwater supply)

- Tanjung Langsat Port
 - Endowed with a 4.5-kilometre shoreline that is ideal for O&G and marine-related industries.
 - Four zones: Storage terminals, oilfield services and equipment (OFSE), regional marine supply base and offshore fabrication and maritime hub.
 - The liquid cargo jetty, with a water depth of 15.0 metres, caters to vessels ranging from 5,000 to 120,000 DWT.
 - The dry cargo jetty can cater to vessels up to 40,000 DWT.
 - Oil storage terminal with a combined capacity of 923,200 m³ (gasoline, naphtha, petroleum, bitumen as well as edible oils).
 - Regional marine supply base (offices, warehouses and open storage area, oilfield logistics, management system services, maintenance and, technical support services for corporate, waste management services and stevedoring.
 - Langsat marine terminal (warehouses, open yard, and industrial land).

PENGERANG INTEGRATED PETROLEUM COMPLEX (PIPC), JOHOR

A NATIONAL SUCCESS SHORING UP INDUSTRY

An on-going development of over 22,000 acres of land, the PIPC is a significant step towards strengthening Johor's downstream oil and gas value chain. The PETRONAS Pengerang Integrated Complex (PIC) occupies 6,303 acres of PIPC which accommodates PETRONAS' Refinery and Petrochemical Integrated Development (RAPID) project facilities and infrastructure.

The PIC is supported by associated facilities that ensure its operational self-sufficiency and reliability, a level of complexity and integration that sets it apart from other complexes. With its myriad of world-class services and infrastructure, it is testament to Malaysia's commitment, capabilities and capacity in the petrochemical industry.

FACILITIES AND INFRASTRUCTURE

- Peninsular Gas Utilisation (PGU) project
- LNG Regasification Terminal
- Centralised Utility Facilities
 - Supply of utilities such as power, industrial gases, water and steam
- Deep Water Terminal
- Air Separation Unit
- Raw Water Supply

PETROCHEMICAL PRODUCTS PRODUCED IN RAPID

This new facility will develop value-added products which will eventually expand the market segments for petrochemical products in Malaysia. The example of value-added products are as follows: -

- Refined Petroleum Products
- Polymers
- Glycols

BINTULU, SARAWAK

Home to several gas-based petrochemical plants, the PETRONAS Bintulu liquefied natural gas (LNG) Complex includes four LNG plants. This establishes Bintulu as the largest producer of LNG in Malaysia, as well as one of the world's largest LNG production facilities in a single location.

FACILITIES AND INFRASTRUCTURE

- Bintulu Port
- Bintulu Airport
- Samalaju Port

PETROCHEMICAL PLANTS IN BINTULU PRODUCE:

- Ammonia
- Urea
- LNG
- Synthetic Gas Oil
- Synthetic Kerosene
- Synthetic Naphtha
- Synthetic Solvents
- Synthetic Detergent Feedstock
- Synthetic Paraffin Wax / Waxy Raffinate

SIPITANG, SABAH

The Sipitang Oil and Gas Industrial Park (SOGIP), a 4,065-acre site strategically located within the Sabah, Brunei and Labuan economic centres, is a premier industrial park dedicated to oil and gas downstream activities in the state of Sabah. With natural gas from Sabah's offshore production facilities, SOGIP is well positioned to spearhead the development of the oil and gas industry in the state.

The Sabah Ammonia Urea or SAMUR project is a urea production capacity expansion initiative undertaken by PETRONAS Chemicals Fertiliser Sabah Sdn. Bhd. (PCFSSB). It consists of an ammonia plant, urea plant and a granulation plant, as well as utilities and jetty facilities.



WHY INVEST IN MALAYSIA?

PUSH FOR THE FUTURE

The world is changing and as energy transition progresses, many oil producers and refiners are pressing the shift key to chemicals as a key target area for the future. As such, petrochemicals are now the fastest-growing segment of the barrel as the obvious downstream value chain trend would be crude oil-to-chemical (COTC) as a way forward. Consequently, national and international oil companies are steadily increasing their stakes in the petrochemical market by integrating resources, optimising the allocation of resources and feedstocks, and sharing utilities, logistics and energy costs.

Additionally, the petrochemical industry is also under pressure to step up to a more knowledge based chemical portfolio in the derivative and specialty markets as demand from consumers are continuously evolving in the chase for better lifestyle options. Therefore, there is a need for petrochemical producers to innovate in formulating superior petrochemical derivatives in the upper tier of the chemical value chain. Additionally, the petrochemical industry is also challenged to play a greater role in balancing economic, environmental and social needs. Companies are also cognisant of the need to incorporate and maintain sound governance and ethical business practices to remain relevant as a socially responsible entity in the future.

AT A GLANCE - WHY INVESTORS CHOOSE MALAYSIA

- Strategic location
- Gateway to ASEAN and AFTA
- Economic stability
- Strong commitment from the Government
- Rich reserves of natural gas
- Competitive source of raw materials
- World-class facilities
- Integrated infrastructure
- Skilled technical manpower
- Good quality of life

INCENTIVES FOR GROWTH

A wide range of tax incentives and exemptions are available for both local and foreign-owned companies in Malaysia. The Government regularly reviews these incentives to ensure companies in the country maintain their competitive edge.

A corporate tax of 24 per cent is applicable to all companies in Malaysia, both local and foreign-owned. Other relevant taxes and exemptions:

INCENTIVES FOR MANUFACTURING COMPANIES

Pioneer Status: Income tax exemption of 70% or 100% on the statutory income for five years; or



Investment Tax Allowance: Investment tax allowance of 60% or 100% on the qualifying capital expenditure for five years. The allowance can be utilized to offset against 70% or 100% of the statutory income.



Reinvestment Allowance: Reinvestment allowance of 60% for 15 years on the qualifying capital expenditure. The allowance can be offset against 70% of the statutory income.



Accelerated Capital Allowance: An accelerated capital allowance consisting of an initial allowance of 40% and an annual allowance of 20% is available for three years after the reinvestment allowance period.



INCENTIVES FOR HIGH TECHNOLOGY COMPANIES

- Pioneer Status with a tax exemption of 100% on the statutory income for five years; or
- Investment Tax Allowance of 60% on the qualifying capital expenditure for five years which can be offset against 100% of the statutory income.

INCENTIVES FOR STRATEGIC PROJECTS

- Pioneer Status with a tax exemption of 100% on the statutory income for ten years; or
- Investment Tax Allowance of 100% on the qualifying capital expenditure for five years, which can be offset against 100% of the statutory income.

PRE-PACKAGED INCENTIVES:

Customised packages that cover tax and non-tax incentives.

OTHER INCENTIVES

- Industrial Building Allowance
- Tariff Related Incentives

DRIVING SUSTAINABLE INVESTMENTS IN THE PETROCHEMICALS INDUSTRY

For more than 50 years, petrochemicals have been essential to society. During this time, the sector has seen continuous change and has adopted cutting-edge technologies and procedures to boost productivity at a lower cost. The chemical sector including petrochemicals, which is the third-largest emitter of carbon dioxide after the iron-and-steel and cement industries, is currently focusing its efforts to minimise its carbon footprint.

MITI together with MIDA is spearheading national-level efforts to put in place all the policies, facilitation and support to ensure that Malaysia is ready to host new green investments coming in for the next few years. The National Investment Aspiration (NIA) will further strengthen Malaysia's ecosystem to meet global megatrends and deliver on the promise of inclusive and sustainable development. There will be more Environmental, Social and Governance (ESG)-related investments as many multinational companies (MNCs) are exporting their products from Malaysia to the ESG-compliant countries.

As ESG-compliant countries lead the way and embed sustainable agendas in their economies, the

overall supply chain (including those from non ESG-compliant countries) would need to oblige and follow suit. This is to keep themselves at par, as well as not to be left behind, in order to maintain their presence and relevance in the supply chain. Hopefully this will encourage our petrochemical industry players in Malaysia to pursue sustainable initiatives as well.

MIDA, as the Government's principal investment promotion and development agency, is working together with companies to foster the adoption and practice of sustainability in their activities. One of the Strategic Thrusts of NIA is 'Unified investment strategy to drive laser-focused delivery on NIA & ESG', as listed in the following table:

INITIATIVES	ACTION	TARGET BENEFIT
1 Harmonised investment strategy and policies, aligned to NIA	<ul style="list-style-type: none">➢ Establish NIA as the guiding framework for all investment decisions➢ Refresh the Promotion of Investments Act (PIA) to better align with the national investment agenda➢ Establish a unified view on the value of investments that is regularly aligned across key stakeholders	<ul style="list-style-type: none">• Sharpened clarity across government machinery on national priorities needed to accelerate fundamental reforms to unlock investments• Enhanced clarity on the direction of policies, providing greater certainty to investors on their business plans• Increased sustainability of long-term investment strategies, ensuring outcomes consistently deliver target national benefits
2 In-depth sectoral roadmaps to guide the transition towards national sustainability targets	<ul style="list-style-type: none">➢ Develop sector-level sustainability roadmaps with policies to holistically support the transition of the ecosystem➢ Develop mechanisms to strengthen accountability amongst industry players and the Government➢ Coordinate market forces to support ecosystem transition	<ul style="list-style-type: none">• Increased resilience and competitiveness of the local ecosystem by strengthening industry response towards sustainability trends• Enhanced clarity on milestones and goals for companies to accelerate the pace of sustainability transition efforts• Strengthened accountability measures to drive sustainable public-private efforts towards national sustainability goals
3 Clear standards and strengthened regulation for ESG disclosures	<ul style="list-style-type: none">➢ Strengthen ESG disclosure requirements for companies➢ Set clear transition plans for the phased adoption of new ESG disclosure requirements	<ul style="list-style-type: none">• Clearer actions to support industry adoption of ESG standards, enhancing global competitiveness amidst rising ESG awareness• Increased transparency and measurability of national progress towards ESG targets to inform future policy decisions

MALAYSIA'S POSITION ON THE ESG JOURNEY: 12TH MALAYSIA PLAN (12MP)

The 12th Malaysia Plan (12MP 2021-2025) outlines recommendations pertaining to the unified direction/way forward which includes the Government's initiatives and drive towards achieving Environmental, Social and Corporate Governance (ESG) as a nation.

The 5-year national development agenda focuses on three (3) main dimensions – Economic Empowerment, Environmental Sustainability and Social Re-engineering.

Theme 3 of the 12MP - "Advancing Sustainability" -focuses on advancing green growth as well as enhancing energy sustainability and transforming the water sector. Two game changers will be implemented, namely embracing the circular economy and accelerating the adoption of the Integrated Water Resources Management (IWRM) programme.

This will give many new opportunities for green growth.

Businesses today operate in a highly dynamic and volatile environment. We are all experiencing unprecedented global economic, environmental, and social change that is occurring at an ever-increasing rate. One of these is the absolute necessity and compelling need for us to address the sustainability challenge through a just and responsible transition.

THEME 3 ADVANCING SUSTAINABILITY

GAME CHANGER VIII Embracing the Circular Economy

GAME CHANGER IX Accelerating Adoption of Integrated Water Resources Management

ADVANCING GREEN GROWTH FOR SUSTAINABILITY AND RESILIENCE

PRIORITY AREA A

Implementing a Low-Carbon, Clean and Resilient Development

STRATEGY A1
Moving Towards a Low-Carbon Nation

STRATEGY A2
Accelerating Transition to the Circular Economy

STRATEGY A3
Sharing Responsibility in Pollution Prevention

STRATEGY A4
Increasing Resilience against Climate Change and Disasters

PRIORITY AREA B

Managing Natural Resources Efficiently to Safeguard Natural Capital

STRATEGY B1
Concerning Natural Ecosystems

STRATEGY B2
Protecting and Conserving Species and Genetic Resources

STRATEGY B3
Ensuring Sustainable Utilisation and Benefit Sharing

STRATEGY B4
Enhancing Conservation of Water Resources

PRIORITY AREA C

Strengthening the Enabling Environment for Effective Governance

STRATEGY C1
Strengthening Environmental Governance

STRATEGY C2
Scaling-up Green Financing and Investments

STRATEGY C3
Instilling Sense of Ownership and Shared Responsibility

ENHANCING ENERGY SUSTAINABILITY AND TRANSFORMING THE WATER SECTOR

PRIORITY AREA A

Ensuring Sustainable Energy for All

STRATEGY A1
Enhancing the Energy Sector

STRATEGY A2
Ensuring Sustainable and Progressive Oil and Gas Subsector

STRATEGY A3
Enhancing the Electricity Subsector

PRIORITY AREA B

Transforming the Water Sector

STRATEGY B1
Empowering People

STRATEGY B2
Strengthening Governance at All Levels

STRATEGY B3
Enhancing Capability in Data-Driven Decision Making

STRATEGY B4
Ensuring Sustainable Financing

STRATEGY B5
Developing Sustainable Infrastructure with Cost-Effective Technology



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