

Digital Economy Masterplan 2025



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بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ

Sesungguhnya kami tidak mempunyai pengetahuan selain daripada apa yang Engkau ajarkan kepada kami. Sesungguhnya Engkau lah Tuhan yang Maha Mengetahui lagi Maha Bijaksana.

Terjemahan Makna Ayat 32, Surah Al-Baqarah

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Table of Contents

Maqasid of the Shariah	5
Titah	6
Co-Chairs Foreword	8
Vision and Mission	10
Strategic Outcomes	13
Wawasan Brunei 2035	14
Smart Nation	15
The Digital Economy	18
Current Digital Landscape	20
Digital Economy Council	24
Strategic Thrusts	28
Strategic Enablers	32
Key Projects	36
Key Success Measures	38
Way Forward	40



Titah

Potensi ekonomi digital juga perlu diteroka. Lalu ke arah ini, Beta telahpun memperkenalkan penubuhan Majlis Ekonomi Digital. Beta difahamkan, satu Plan Induk Ekonomi Digital sedang diungkayahkan, bagi tujuan, untuk menjadikan negara ini sebagai sebuah negara Smart Nation.

Titah by His Majesty Sultan Haji Hassanal Bolkiah Mu'izzaddin Waddaulah ibni Al-Marhum Sultan Haji Omar 'Ali Saifuddien Sa'adul Khairi Waddien, Sultan and Yang Di-Pertuan of Brunei Darussalam in conjunction with His Majesty's 73rd Birthday Celebration on 15th July 2019

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His Majesty Sultan Haji Hassanal Bolkiah Mu'izzaddin Waddaulah ibni Al-Marhum Sultan Haji Omar 'Ali Saifuddien Sa'adul Khairi Waddien
Sultan and Yang Di-Pertuan of Brunei Darussalam



**Yang Berhormat
Dato Seri Setia Dr. Awang
Haji Mohd Amin Liew
bin Abdullah**

Minister at the Prime
Minister's Office and
Minister of Finance and
Economy II,
Brunei Darussalam as
Co-Chair of the Digital
Economy Council (DEC),
Brunei Darussalam

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ
السلام عليكم ورحمة الله وبركاته

Alhamdulillah, with the publication of the Digital Economy Masterplan 2025, Brunei Darussalam now has a key reference on the direction and steer for our Digital Economy initiatives.

Transformation to a Digital Economy is one of the catalysts in our pursuit of economic prosperity and sustainability. In line with the 2020/2021 budget theme of 'Investing in Our Future', this Masterplan will steer our further investment into the development of a Digital Economy, which will give guidance to our policies and initiatives, gear us towards growth through improved efficiency and promote good governance.

His Majesty Sultan Haji Hassanal Bolkiah Mu'izzaddin Waddaulah ibni Al-Marhum Sultan Haji Omar 'Ali Saifuddien Sa'adul Khairi Waddien, Sultan and Yang Di-Pertuan of Brunei Darussalam, has at various occasions, shared his wise and profound observations on the wave of the 4th Industrial Revolution and the economic opportunities it creates, the shifting challenges and most importantly, the need for Brunei Darussalam to be prepared, for this global technological paradigm shift. To prepare ourselves to embrace the rapid technological advances, the telecommunications industry has undergone restructuring exercise to enable digitally-driven changes and initiatives. This exercise is one of the key milestones in 2019 as emphasized by His Majesty Sultan and Yang Di-Pertuan of Brunei Darussalam in the Titah at the opening ceremony of the 16th Session of the State Legislative Council. Hence, the Digital Economy Masterplan 2025 comes at an opportune time where transformation in the

telecommunications industry can also act as the enabler and facilitator for innovation.

A Digital Economy not only offers the platform to nurture talent and promote innovation, but it also presents us the opportunity to take collective actions to address areas for improvement. With this in mind, I wish to reiterate on the importance of alignment and coordination in the planning and strategizing of digital initiatives across various economic activities towards transforming our economic landscape.

Throughout the process of coming up with this Masterplan, the Digital Economy Council has also identified on flagship projects that will produce the most significant impact on the national digital transformation agenda. Guided by the vision 'Smart Nation through Digital Transformation', the Digital Economy Masterplan 2025 has, also amongst others, identified strategies, enablers and key success measures for digital economy. These components are solidified by the inputs and feedbacks received during the socialization process of the Masterplan.

Strengthened by the spirit of solidarity and the Whole of Nation approach, the potential opportunities of a digital economy is here to be fully leveraged upon with strong collaboration between the Government, private sectors, academia and the consumers alike. With our digital transformation agenda in place, Insha Allah, we can together drive Brunei Darussalam to the status of a Smart Nation and to realise the vision of Wawasan 2035.



**Yang Berhormat
Dato Seri Setia
Awang Abdul Mutalib
bin Pehin Orang Kaya
Seri Setia Dato Paduka
Haji Mohammad Yusof**

Minister of Transport
and Infocommunications,
Brunei Darussalam
as Co-Chair of the
Digital Economy Council
(DEC), Brunei Darussalam

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ
السلام عليكم ورحمة الله وبركاته

Alhamdulillah, as Co-Chair of the Digital Economy Council (DEC), I am pleased to share the Digital Economy Masterplan 2025 for Brunei Darussalam.

On 15th July 2019, His Majesty Sultan Haji Hassanal Bolkiah Mu'izzaddin Waddaulah ibni Al-Marhum Sultan Haji Omar 'Ali Saifuddien Sa'adul Khairi Waddien, Sultan and Yang Di-Pertuan of Brunei Darussalam, in the Titah, amongst others, called for the potentials of the digital economy to be explored. In upholding His Majesty's Titah, the Digital Economy Masterplan 2025 embodies the vision, enablers and strategies on digital economy to propel Brunei Darussalam as a Smart Nation.

The formulation of the Digital Economy Masterplan is very much embedded with the Whole of Nation approach. An iterative approach was conducted in this process to ensure a holistic masterplan that resonates well with the respective strategies of all stakeholders. Hence, the fundamentals, strategies, initiatives and success measures identified in the Digital Economy Masterplan 2025 depend very much on the collective and coordinated roles of all stakeholders, in implementing their respective digital transformation initiatives.

In preparing Brunei Darussalam to fully embrace the potentials of digital economy, the Ministry of Transport and Infocommunications (MTIC) is working closely with the Ministry of Finance and Economy as well as other stakeholders in upgrading the ICT infrastructure in Brunei Darussalam. It is with such infrastructural

readiness that seamless delivery of competitive services will be enabled for the convenience of official, commercial and personal transactions.

The Digital Economy Masterplan 2025 emphasises on the need to go beyond connectivity. Impactful initiatives and game-changing projects, referred to as Flagship Projects, in both Government and private sectors, have been identified. These are projects with the most potential to achieve increased production, cost effectiveness and optimization of resources. The Masterplan also places great significance on enriching the society with skills and knowledge that are in line with the trends and technologies. With the challenges brought about by the 4th Industrial Revolution, the need to ensure continuous relevance is becoming more important nowadays.

Inshaa Allah, the Digital Economy Masterplan 2025 will serve as a roadmap that charts and guides the implementation of digital transformation initiatives. This Masterplan represents a significant step forward in charting the national digital agenda, in line with technological trends, industry development as well as the needs of consumers. This will be made possible with the continuous collaboration between Government and private sector agencies, higher learning institutions, non-government organisations (NGOs) and equally important, the consumers, in together, realizing the goals of Wawasan Brunei 2035.

Chapter

Vision and Mission

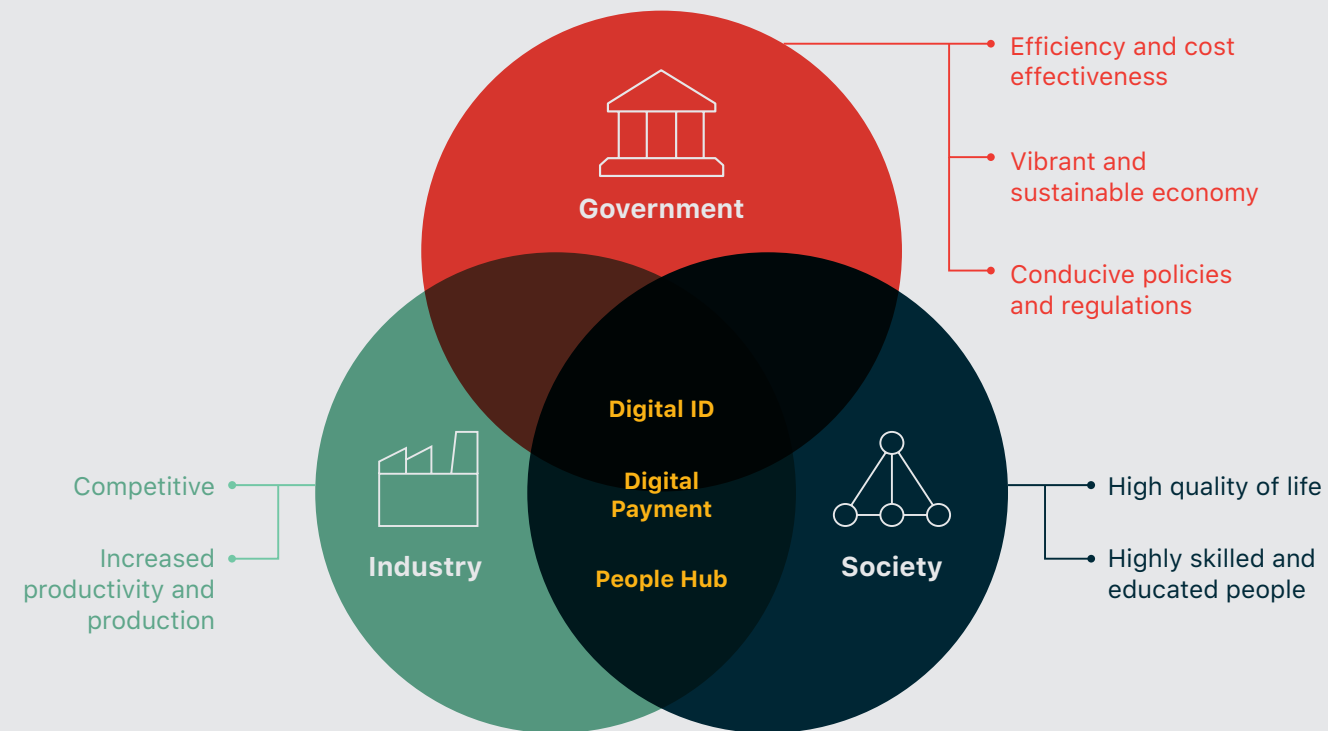
Strategic Outcomes

Wawasan Brunei 2035

Smart Nation

The Government, Industry and Society are closely interrelated in the eco-system of Digital Economy.

The DEC Flagship Projects on Digital ID, Digital Payment and People Hub serve as the backbone of the eco-system.



Vision



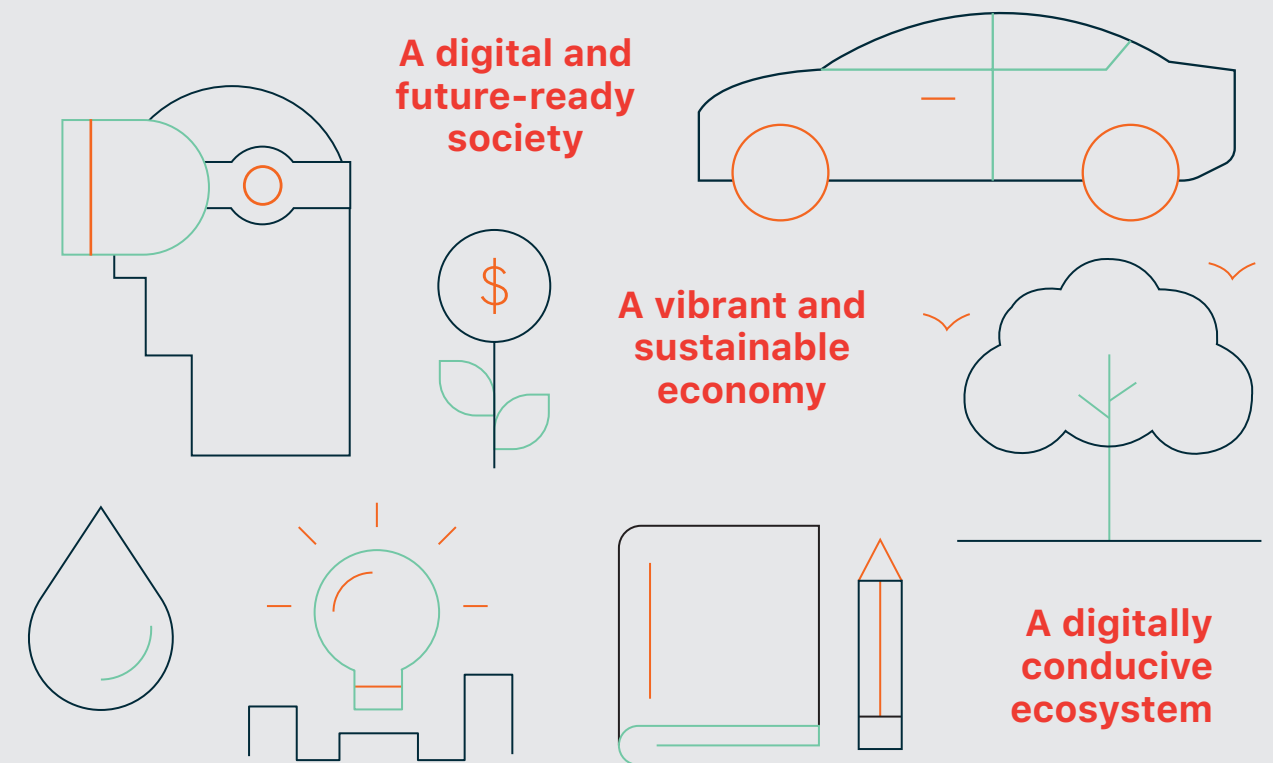
Smart Nation through Digital Transformation

Mission



To drive and enhance Brunei Darussalam's socio-economic growth through Digital Transformation

Strategic Outcomes



Wawasan Brunei 2035



Highly educated, skilled
and accomplished people



High quality of life



Dynamic and
sustainable economy

Digital Economy is the key enabler to propel Brunei Darussalam to the status of a Smart Nation. For Brunei Darussalam, Smart Nation is driven by Digital Government, Digital Economy and Digital Society.

This means we need to go beyond enabling connectivity by leveraging on digital technologies and enriching our society with the necessary skills and knowledge.

Smart Nation is characterised by :-

- Vibrant and diversified economy;
- Improved competitiveness and economic growth by developing infrastructure, innovation, data capability, human capital and other resource; and
- Improved quality of life, public services, schools, safety, mobility of people and to achieve environment sustainability

Smart Nation



Chapter

The Digital Economy

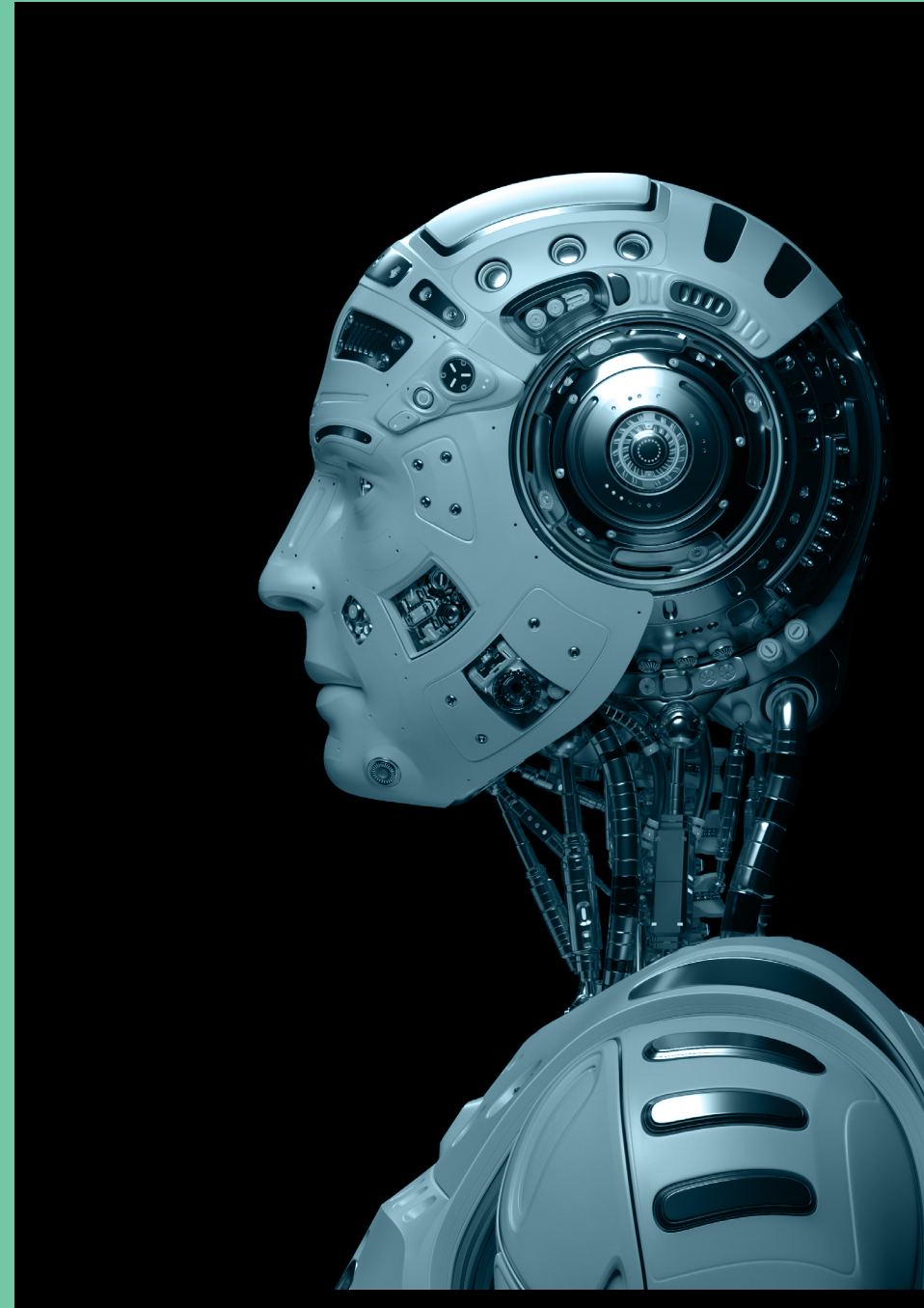
**Current Digital
Landscape**

Digital Economy Council

The Digital Economy

As the key enabler for Smart Nation, the scope of Digital Economy goes beyond the ICT sector. Digital economy covers initiatives and activities, both in the digital and non-digital sectors, that leverages on technology to achieve impactful outcomes, such as:-

- increased productivity and production;
- enhanced efficiency;
- increased cost effectiveness;
- improved transparency and governance;
- encourages participation; and
- facilitates official, business and personal transactions.

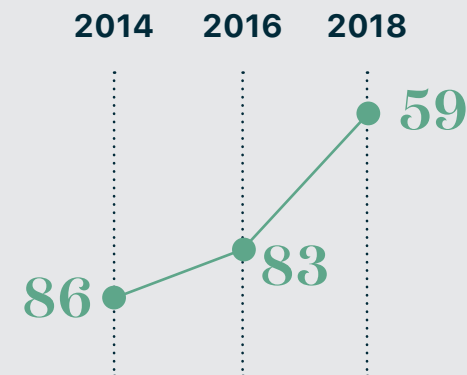


This will be driven by the Whole of Nation approach with the full engagement and participation from the key industry players, academia and end-users.

It is only through the implementation and delivery of Brunei Darussalam's digital transformation, can the vision of the Digital Economy be fully realised for economic progress and social well-being.

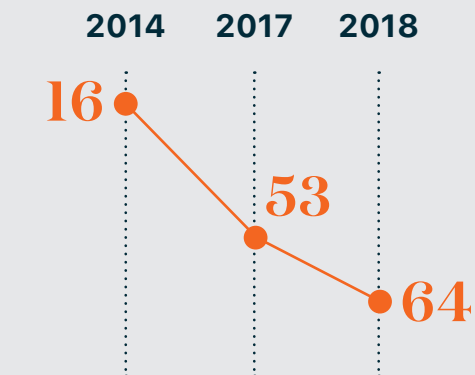
Current Digital Landscape

EGov Development Index
(out of 193 countries)



E-Government Development Index from United Nations E-Government Survey by United Nations (UN)

Global Cybersecurity Index
(out of 194 countries)



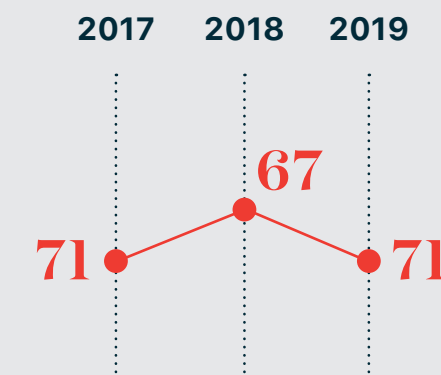
Global Cybersecurity Index by International Telecommunications Union (ITU)

ICT Development Index
(out of 176 countries)



ICT Development Index from Measuring the Information Society Report by International Telecommunications Union (ITU)

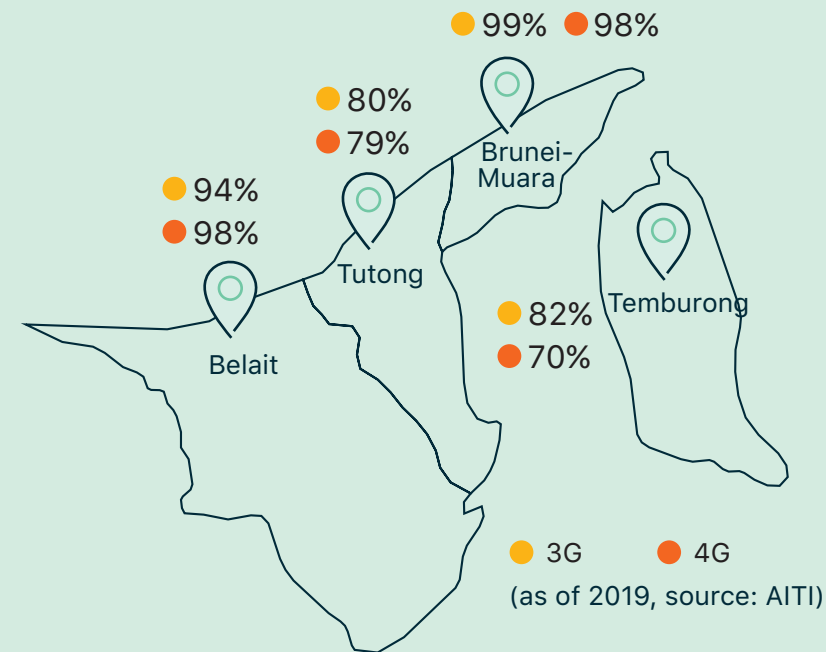
Global Innovation Index
(out of 129 countries)



Global Innovation Index from The Global Innovation Index Report by World IP Organisation (WIPO)

Mobile phone usage**134%**

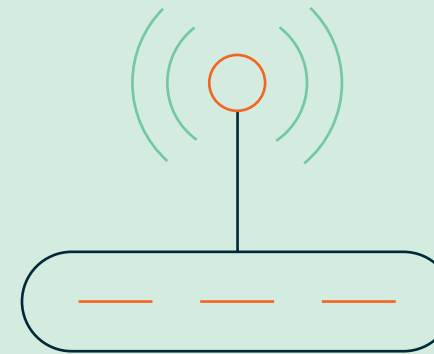
subscription of mobile service per 100 inhabitants in Brunei Darussalam.
(as of 2019, source: AITI)

**Internet Broadband Usage****95%**

of individuals use the Internet which is measured by individuals' daily usage as per the Brunei Darussalam ICT Household Report 2019.

Mobile Broadband Service Coverage**95%**

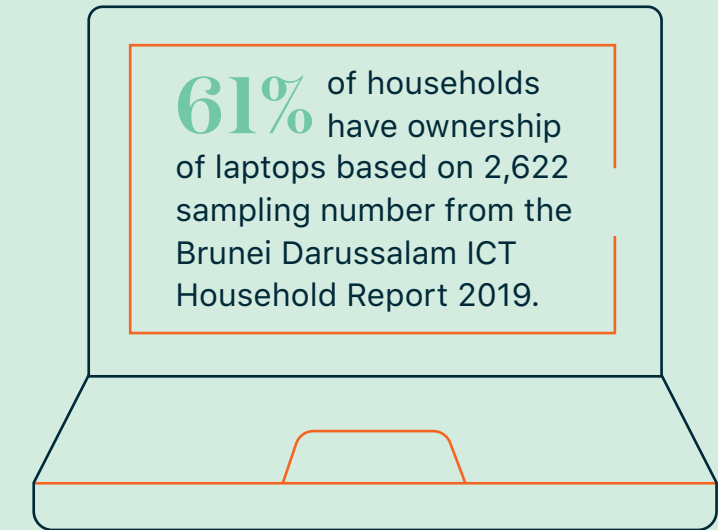
of total population covered by 4G network - mobile broadband.
(as of 2019, source: AITI)

**Fixed Broadband Subscription**

50% subscription of fixed broadband service per 100 households and businesses in Brunei Darussalam.
(as of 2019, source: AITI)

Household with laptop

61% of households have ownership of laptops based on 2,622 sampling number from the Brunei Darussalam ICT Household Report 2019.

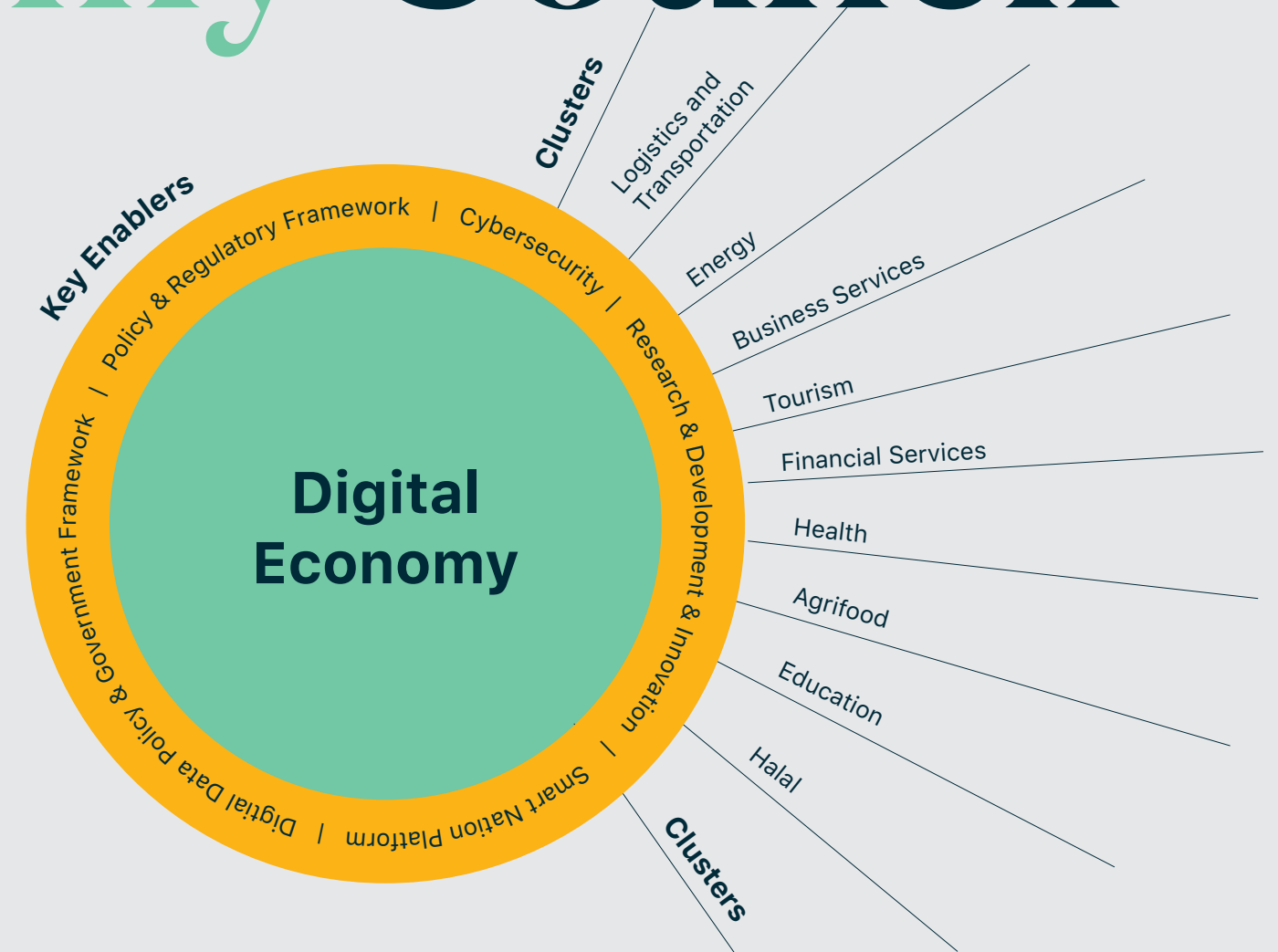
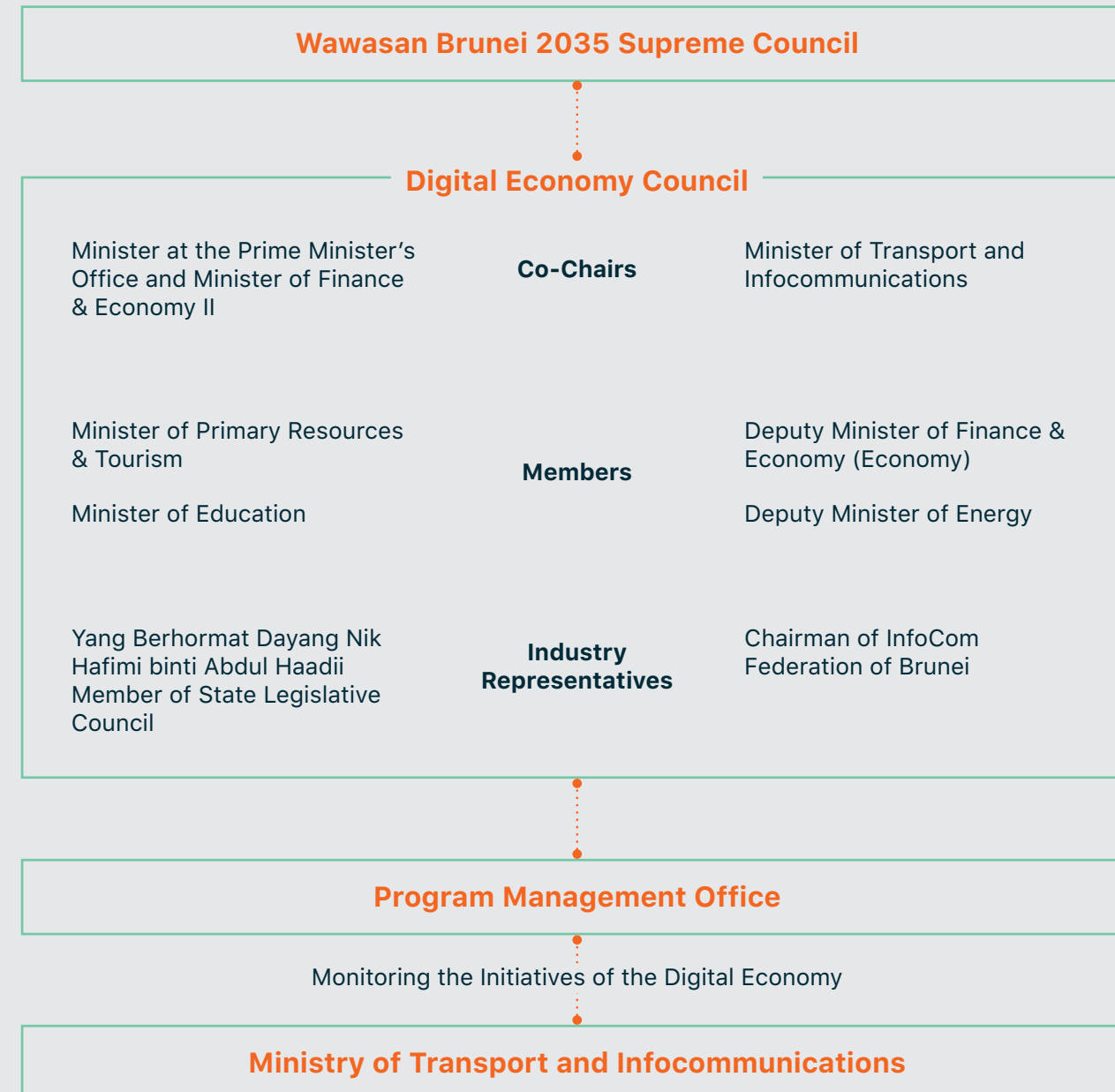
**Household use Facebook****61%**

of household use Facebook based on 2,622 sampling number from Brunei Darussalam ICT Household Report 2019.

**Smartphone****88%**

of households own smartphones in Brunei Darussalam based on a 2,622 sampling number from the Brunei Darussalam ICT Household Report 2019.

Digital Economy Council



National Steer for Digital Transformation

The Digital Economy Council (DEC) takes over the roles of the Brunei Darussalam National IT Council (BIT Council) and the e-Government Leadership Forum (EGLF) in providing the direction and steer on digital economy initiatives for Brunei Darussalam.

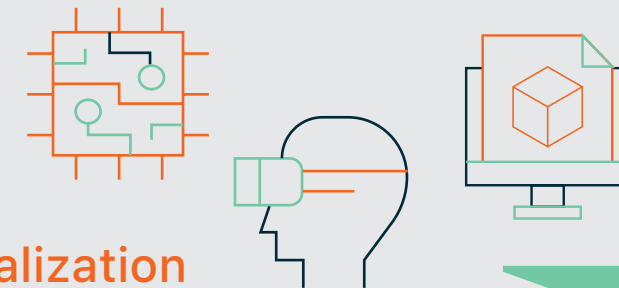


Chapter

Strategic Thrusts

Strategic Enablers

Strategic Thrusts



Industry Digitalization

Currently, there is an unfamiliarity with the implementation of IR4.0 technologies, leading to a lack of understanding for digitalization.

Digitalization will create opportunities for innovation, and to chart key efforts, a digital transformation plan needs to be developed for each industry sector.

Focuses:

Assessment of capabilities and readiness of players to adopt IR4.0 technologies

Undertake a comprehensive industry awareness programme across all stakeholders with particular focus on MSMEs

Drive adoption of technology through training on key technology solutions and collaboration with key industry players

Showcase IR4.0 technologies and application through pilot projects

Government Digitalization

The government plays a critical role in facilitating economic development.

Focuses:

Implement a digital identity ecosystem

Innovate the public experience by development services that promote a holistic lifecycle approach

Evolve the Cloud usage



A Thriving Digital Industry

The ICT sector needs to look towards the application of technologies to nurture and sustain growth for the improvement of the local digital sector, and other specific sectors.

Focuses:

Implement cybersecurity initiatives

Endorse and implement digital data policy that will provide governance and a framework for data protection and sharing



Manpower and Talent Development

Brunei's future workforce needs to be digitally capable, equipped with the right skills to adapt to the rapid developments in technology.

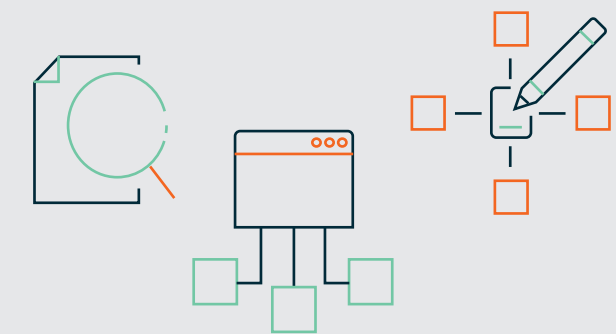
Focuses:

Study the demand for digital jobs in all industries

Update the education programmes and develop local capabilities

Enhance the capabilities of the existing workforce by re-skilling and redeployment of human capital

Create a digital lifelong learning framework



Strategic

1 Smart Nation Platform

A robust and extensive Smart Nation platform is crucial to support a seamless service delivery among government agencies, businesses and citizens.

2 Digital Data Policy and Governance Framework

This will result in the establishment of a national data office that will oversee the policy and governance of data for personal, commercial and official purposes in the long run.

4 Cybersecurity

The increase in digital usage has brought about the need to protect data, infrastructure and networks from growing cyber threats. Trust is key, and with the establishment of Cyber Security Brunei (CSB), cybersecurity will continue to be addressed and prioritized.

Enablers

3 Policy and Regulatory Framework

Digital economy initiatives will be guided by policies and regulations in line with innovation and technological trends.

5 Research and Development (R&D) and Innovation in Digital Technologies

R&D and innovation are crucial to power sustainable digital transformation plans.

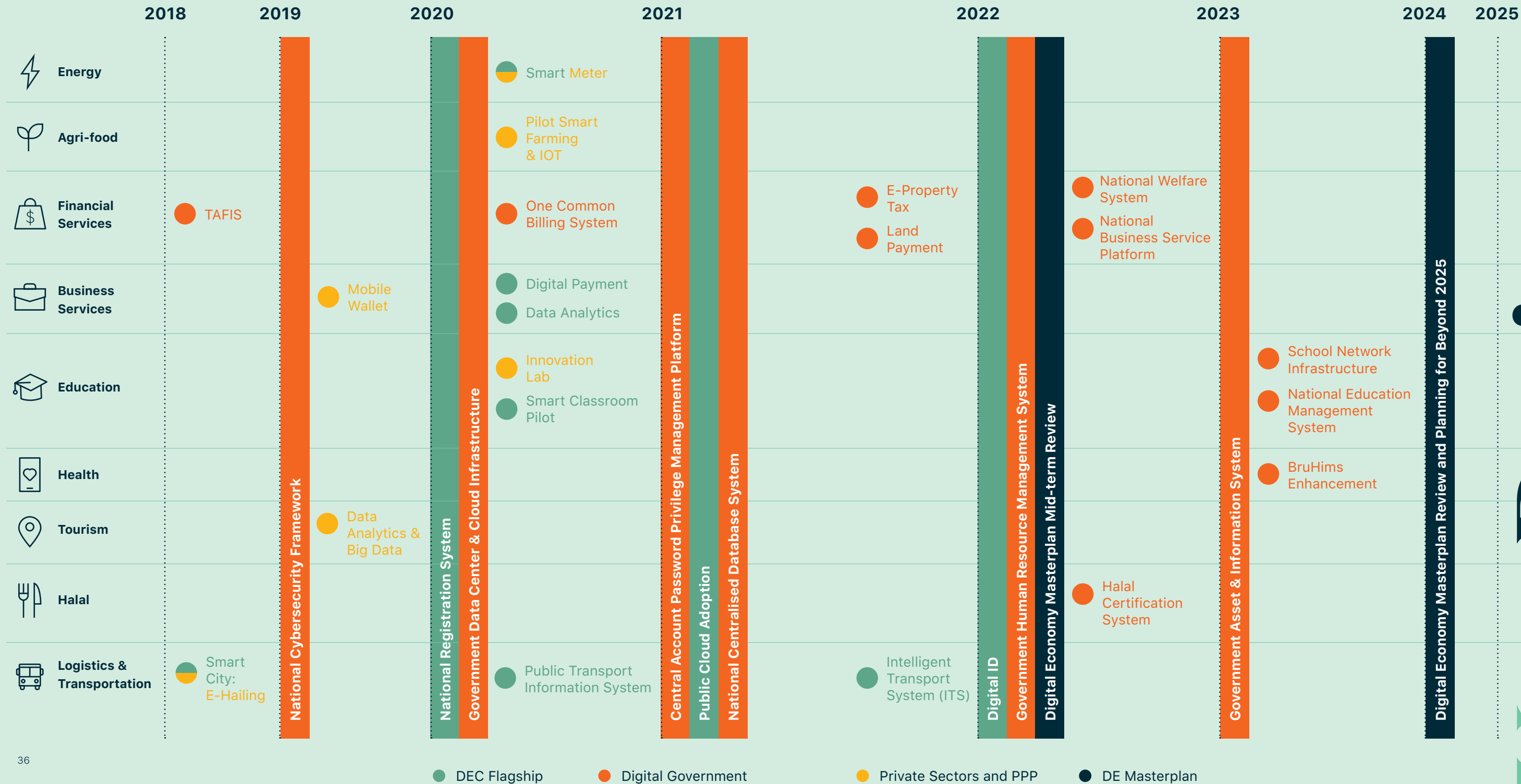
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Chapter

Key Projects

**Key Success
Measures**

Way Forward



Key Projects

Key Success Measures

1

A vibrant and sustainable economy

Increased contribution of the digital sector to GDP growth

Increased GDP generated from other economic sectors from digital transformation

2

A digital and future-ready society

Widespread use of ICT in major industries

Increased rate of Bruneians with access to broadband as a basic utility

Improved quality of life through inclusive access to digital services

Increased digital literacy rate among Bruneians

3

A digitally conducive ecosystem

Top 40 of International Telecommunications Union (ITU)

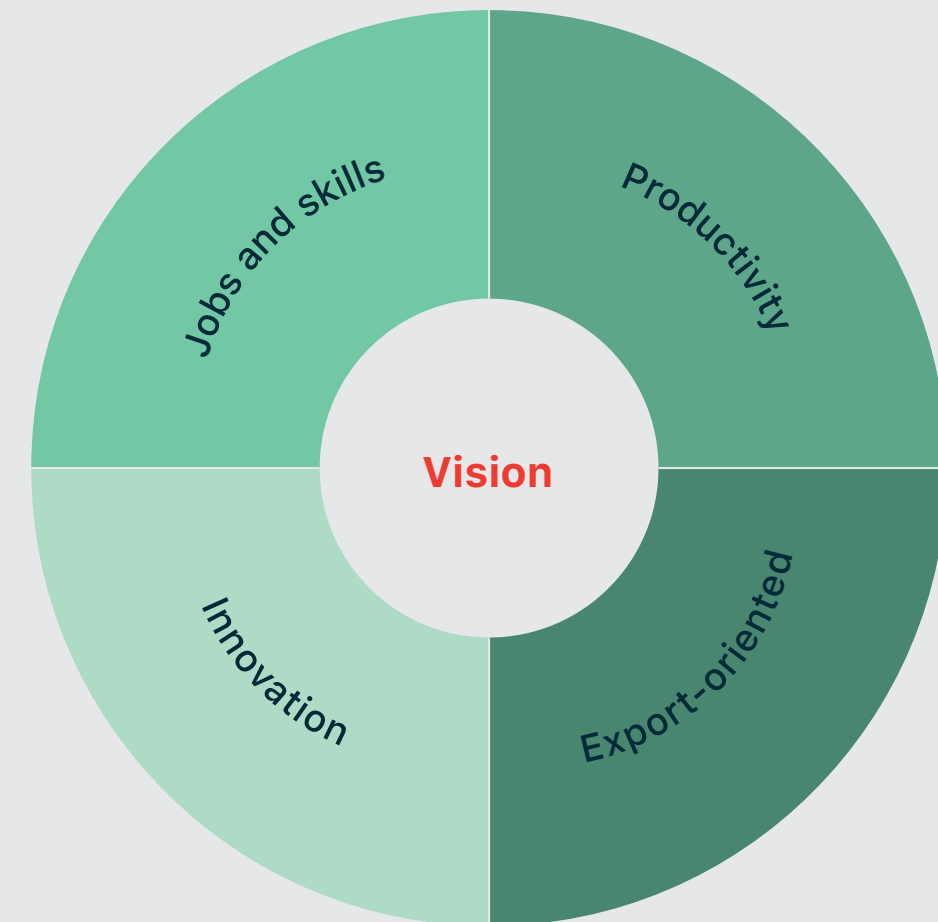
The ICT Development Index:
Access: ICT readiness infrastructure

Use: ICT intensity and usage

Skills: Capabilities including education enrolment

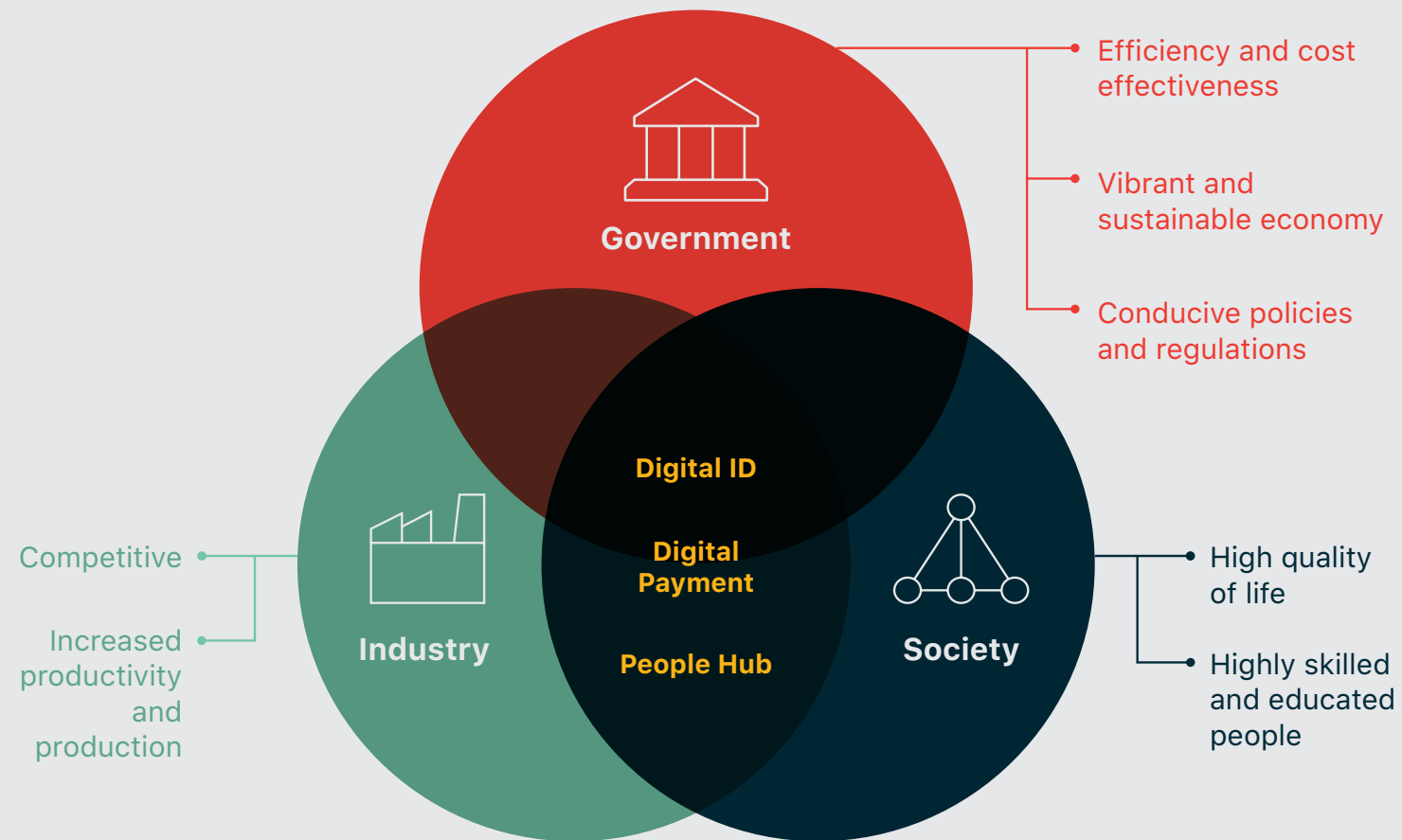
Digital Transformation Plan to be spearheaded by Ministries for the Clusters identified under Digital Economy Council.

Digital Transformation Plan to include the following components:-



The Government, Industry and Society are closely interrelated in the eco-system of Digital Economy.

The DEC Flagship Projects on Digital ID, Digital Payment and People Hub serve as the backbone of the eco-system.





مجلس ايكونومي ديكيئل
DEC DIGITAL
ECONOMY COUNCIL