PETROS

SARAWAK GAS ROADMAP (SGR)

ECOSYSTEM BLUEPRINT

LED BY PETROLEUM SARAWAK BERHAD (PETROS)



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FOREWORD

"Sarawak Gas Roadmap (SGR) Ecosystem Blueprint outlines our shared ambition to build a competitive, capable, and future-ready energy and industrial services ecosystem, enabling Sarawak-based companies to take on larger scopes, support national development, and become leaders in the regional energy transition."

FOREWORD BY
THE RIGHT HONOURABLE
DATUK PATINGGI TAN SRI (DR) ABANG HAJI ABDUL RAHMAN ZOHARI BIN TUN DATUK ABANG HAJI OPENG

PREMIER OF SARAWAK
MINISTER FOR ENERGY AND ENVIRONMENTAL SUSTAINABILITY SARAWAK,
MINISTER FOR FINANCE AND NEW ECONOMY &
MINISTER FOR NATURAL RESOURCES AND URBAN DEVELOPMENT

Sarawak's Oil and Gas industry is entering a new phase of growth that is anchored not only by our oil and gas resources, but also by the strength of our institutions, people, and commitment to innovation. Guided by strategic frameworks such as the Post-COVID Development Strategy 2030 (PCDS 2030), Sarawak Gas Roadmap (SGR), Sarawak Energy Transition Policy (SET-P), Sarawak Sustainability Blueprint 2030 and Hydrogen Economy Roadmap 2035, we are laying the foundation for long-term prosperity, resilience, and sustainability.

From opportunities in traditional oil and gas exploration and production to prospects for expanding our downstream petrochemical sectors, and into emerging low-carbon industries, Sarawak's energy industry is central to our post-COVID recovery and long-term growth. Under PCDS 2030, we are targeting to double Sarawak's GDP from RM140 billion to RM280 billion by 2030 and the oil and gas sector will play a critical role in achieving this ambition.

Supporting Sarawak's energy and industrial growth is our Oil and Gas Services and Equipment (OGSE) sector and adjacent industries. In response to the growing prominence of technologies like Carbon Capture, Utilisation and Storage (CCUS), Sarawak's energy and industrial services ecosystem must continue to adapt and expand its involvement across the entire Engineering, Procurement, Construction and Commissioning (EPCC) value chain.

Our local energy and industrial services companies are already proving their capabilities, taking on broader and larger projects and adopting global standards, particularly in Health, Safety and Environment (HSE). I believe Sarawak-based energy and industrial companies can rise to the occasion and, not only participate in the Sarawak growth story but also help shape Southeast Asia's energy transition goals.

We envision a future where Sarawak companies achieve substantial valuations on the stock exchange, putting them on par with international firms. The Sarawak Gas Roadmap (SGR) Ecosystem Blueprint was created to make this vision a reality, serving as our joint ambition and strategic action plan. It outlines 15 practical, results-driven programmes to strengthen local capabilities, foster innovation, and unlock opportunities for energy and industrial services companies, thus empowering them to grow into competitive, sustainable players in both regional and global markets.

Let us move forward with purpose, turn this vision into reality and build an integrated ecosystem that delivers decades of value and opportunity for Sarawak. Together, we will not only fuel Sarawak's growth but help lead the region into a low-carbon energy future.



THE RIGHT HONOURABLE DATUK PATINGGI TAN SRI (DR) ABANG HAJI ABDUL RAHMAN ZOHARI BIN TUN DATUK ABANG HAJI OPENG

PREFACE



“This Blueprint reflects our Purpose - Harnessing Resources for the Sustainable Progress of Sarawak and Beyond. It is underpinned by our duty: to responsibly develop Sarawak’s energy resources, to build a globally competitive ecosystem, and to unlock opportunities for innovation, talent, and partnerships across the region. Our goal is not only to create value for Sarawak, but also to position the State as a trusted and capable player in the regional and global energy supply chain.”

PREFACE BY
TAN SRI DATUK AMAR (DR.) HAMID BIN BUGO
PETROS INDEPENDENT, NON-EXECUTIVE CHAIRMAN
OF THE BOARD OF DIRECTORS

The energy and industrial services sector is a strategic pillar of Sarawak’s economic transformation. As the energy landscape evolves, shaped by global shifts in sustainability, regional development, and technological innovation, Sarawak must build an ecosystem that can deliver confidently at scale, across both traditional and energy transition segments.

Our Sarawak Gas Roadmap (SGR) provides a long-term vision to unlock the State’s full gas potential, targeting over RM300 billion in investments, contributing approximately RM120 billion to the State’s GDP by 2035 and forecasting 180,000 new jobs within the span of 10 years across the value chain. These developments will drive significant and sustained demand for energy and industrial services including fabrication, engineering, logistics, maintenance, and talent development. Companies must be prepared to seize and grow with this opportunity.

This SGR Ecosystem Blueprint defines a clear and coordinated growth strategy. It reflects our shared aspiration to move beyond fragmented subcontracting into full-scope delivery, technology partnerships, and value-added services. From developing heavy fabrication capacity and offshore supply bases, to enabling marine logistics, digital systems, and certified workforce pathways, the Blueprint outlines the critical enablers needed to raise Sarawak’s energy and industrial capabilities to national and regional standards.

As Sarawak’s designated SGR Ecosystem coordinator, PETROS is fully committed to driving this strategy forward and collaborating with the State and federal agencies, industry players, and the people of Sarawak to turn this Blueprint into action. This ensures that our energy and industrial services sector not only supports the growth envisioned in the SGR, but also becomes an engine of growth for Sarawak and a leading force in Malaysia’s next phase of energy development.



TAN SRI DATUK AMAR (DR.) HAMID BIN BUGO

EXECUTIVE SUMMARY



Sarawak's energy and industrial services sector is at a turning point. Today, more than 1,000 companies generate up to RM400 million annually from projects and activities linked to SGR. At the same time, the sector is broadening its role beyond traditional offshore services, with new opportunities emerging in gas, upstream, petrochemicals, Carbon Capture, Utilisation and Storage (CCUS) and power.

Currently, this momentum is already visible on the ground: the 500MW Miri Combined Cycle Gas Turbine (CCGT) power plant is progressing steadily to strengthen Northern Region power reliability whilst Sarawak witnessed the successful commencement of first oil production from the Adong Kechil West (AKW) in July 2026. On the other hand, Samalaju Pipeline (SPL) project continues to advance as part of the State's industrial energy development efforts.

Together, these projects and the sector's expansion into gas, upstream, petrochemicals, CCUS and power will drive the next phase of growth. By 2035, these drivers are expected to scale the sector's contribution to an estimated value of RM120 billion in GDP and reinforce Sarawak's position as one of Malaysia's core energy and industrial hubs.



While we have made strides, major challenges remain. The majority of our Sarawak Gas Roadmap (SGR) ecosystem players are Small and Medium Enterprises (SMEs) operating as subcontractors, and our infrastructure is not consistently utilised. Additionally, there are critical gaps in vendor certification, technical maturity, and access to financing. A coordinated and strategic approach is essential to unlock Sarawak's full potential.

The SGR Ecosystem Blueprint responds to this opportunity to propel the State's energy and industrial services sector to its vision: **"To create a resilient, competitive and future-ready ecosystem that drives the execution of SGR and positions Sarawak as a regional energy and industrial hub".** It outlines a three-phase development strategy anchored on key focus areas that strengthen industrial capability, infrastructure, talent, innovation, and access to financing.

This Blueprint features eight flagship programmes designed to elevate Sarawak's delivery capacity, competitiveness, and ecosystem integration. These span the SGR Activity Horizon, strategic partnerships, infrastructure development, talent pipeline programmes and a financing platform.

Together, these efforts will enable the energy and industrial services sector to move beyond supporting roles towards full project delivery.

This is Sarawak's moment to lead.

SGR Ecosystem Framework

VISION

Powering Sarawak Gas Roadmap (SGR) through a high-performing ecosystem

OBJECTIVE

Enabling SGR talents, ecosystem players, business stakeholders and the State to be:

STRATEGIC OUTCOMES

COMPETITIVE
Build local capabilities to deliver SGR projects and compete for high-value opportunities across energy and other industries, within and beyond Sarawak.

RESILIENT
Strengthen the technical, financial, and workforce resilience to sustain long-term growth for the State and industry.

LOW-CARBON READY
Prepare SGR ecosystem players and business partners to capture opportunities in hydrogen, CCUS, gas, and low-carbon power sectors.

SELF-SUFFICIENT
Strengthen local capabilities to deliver projects independently and capture greater long-term value in Sarawak.

3 KEY STAKEHOLDER GROUPS

SGR ECOSYSTEM PLAYERS
To improve quality of life for the local community through high-value job creation, affordable and sustainable energy access, and inclusive local participation in Sarawak's industrial growth.

THE STATE GOVERNMENT
To establish PETROS and the SGR ecosystem as the State's one-stop energy champion, strengthening Sarawak's energy leadership, industrial capability, and regional influence.

BUSINESS STAKEHOLDERS
To create a reliable, transparent, and future-ready environment that supports investment, innovation, and the transition towards a low-carbon economy.

ECOSYSTEM FOCUS AREAS & 15 PROGRAMMES

Industry Demand
1. SGR Activity Horizon
2. Sarawak Company Certification
3. Alignment of SGR Ecosystem with Sarawak Policies

Infrastructure
4. Fabrication Yard Development
5. Supply Base Development
6. Logistics Hub Development

Technology
7. SGR Industry Portal
8. SGR Technology Network
9. SGR Catalyst Programme

Capability
10. SGR Industrial Capability Programme
11. Expert Talent Attraction
12. SGR Enterprise Excellence Programme
13. SGR Strategic Partnerships
14. Sarawak Talent Development Framework & Information System

Financing
15. Financing Facilitation Programme

● Flagship
○ Non-Flagship

STRATEGIC IMPACT CATEGORIES

- Drilling and Well Services
- Engineering, Construction and Projects (ECP)
- Operations & Maintenance (O&M)
- Logistics
- Equipment Manufacturing



01

Introduction

Case for Change

INTRODUCTION

A New Chapter for Sarawak Gas Roadmap Ecosystem

Sarawak is entering a pivotal new chapter in its industrial development; one defined by energy transformation, policy clarity, and economic ambition.

Under the Sarawak Gas Roadmap (SGR), significant investments and job creation in the State are expected to be achieved through large-scale developments in upstream, processing, petrochemicals, infrastructure, power generation and Carbon Capture, Utilisation and Storage (CCUS) over the next 10-15 years. These projects are reshaping Sarawak's energy landscape while expanding opportunities for energy and industrial services.

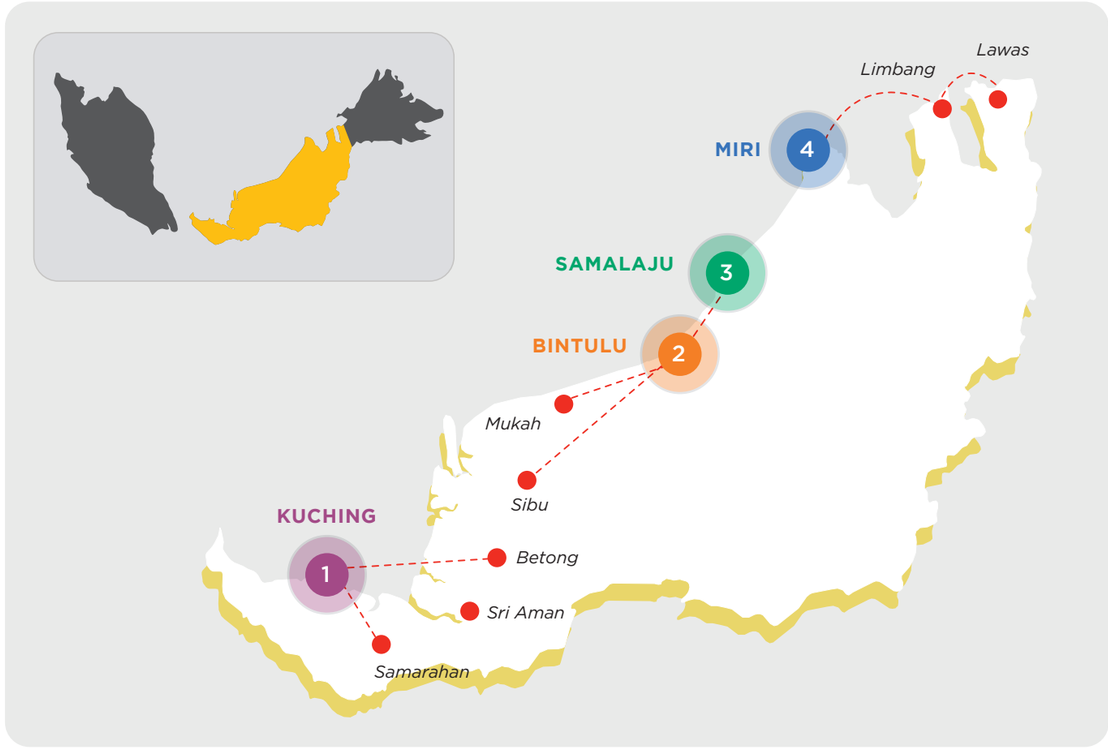
SGR is expected to drive the demand for project delivery and industrial capabilities across the full energy value chain. This includes:

- Upstream gas field development and offshore facilities
- Midstream processing plants and pipelines
- Downstream petrochemical and industrial complexes
- Large-scale Carbon Capture, Utilisation and Storage (CCUS) projects
- Small-scale gas liquefaction and break-bulking facilities
- New gas-fired power plants to supply both industries and major off-takers such as data centres
- Virtual Pipeline System (VPS)

This translates into opportunities spanning engineering, fabrication, logistics, digital systems, operations, and maintenance.



Four Strategic Hubs identified in Sarawak Gas Roadmap (SGR) to drive downstream investment and build low-carbon economy for Sarawak & beyond



New CCGT for Long-term Power Supply Security to Greater Kuching	Realising Petrochemicals Market Potential	Realising Industrial Potential	Continue Obligation for Security of Supply
KUCHING Low-Carbon Hub	**BINTULU** Integrated Petrochemicals Complex	**SAMALAJU** Integrated Industrial Development	**MIRI** Small-scale Industrial, residential, commercial development
LNG ecosystem (Import, FSRU, Pipelines, Trucking)	Integrated Methanol Industrial Cluster	Integrated Ammonia Industrial Cluster	Miri CCGT
New CCGT	Olefins-Aromatics Complex	New CCGT	Liquefied Petroleum Gas (LPG)
Low-Carbon High Value Industrial Clusters	LNG Virtual Pipeline	Industrial Fuel	SSLNG and Virtual Pipeline
CCUS	CCUS	Ammonia as Fuel/ Hydrogen Carrier (Export)	
		Bintulu–Samalaju Pipeline	
		CCUS	

SGR Alignment with Sarawak's Development Priorities

The Sarawak Gas Roadmap (SGR) is structured around four strategic development hubs, each with distinct but complementary industrial and energy functions. Collectively, these hubs form an integrated statewide gas ecosystem, connected through pipeline and virtual pipeline infrastructure and supported by associated industrial developments.

Beyond enabling the effective utilisation of Sarawak's gas resources, the SGR is intended to catalyse broader economic and industrial development. It provides a platform for local companies to participate more meaningfully across the gas and energy value chain, progressively build capabilities and move into higher-value activities. In doing so, the SGR will strengthen local business participation, develop a skilled workforce and contribute towards a more diversified and resilient Sarawak economy.

Ecosystem development is therefore an integral part of the SGR. Alongside the development of gas infrastructure and industrial projects, emphasis is placed on strengthening local capabilities, expanding industry participation, improving access to financing, accelerating technology and digital adoption, and developing the workforce required to support Sarawak's evolving energy landscape.

The SGR and its ecosystem initiatives are also aligned with Sarawak's broader development and energy-transition priorities, including the Sarawak Energy Transition Policy (SET-P), Hydrogen Economy Roadmap and Sarawak Sustainability Blueprint. Collectively, these frameworks provide the wider strategic direction for energy security, industrial growth, decarbonisation, sustainability and the development of new low-carbon industries.

Through this alignment, the SGR serves not only as a roadmap for gas development, but also as an enabler of Sarawak's wider industrial and energy ambitions. It creates opportunities for local companies, SMEs and service providers across engineering and construction, operations and maintenance, logistics, technology and digital solutions, while building the capabilities required to participate in emerging low-carbon and higher-value industries.



estimated RM300b in investments

CASE FOR CHANGE

Laying the Groundwork for Scalable Growth

Sarawak is strengthening its position to lead the next wave of national energy development.

SGR is expecting over RM300 billion in investments and the State is positioning itself to be a critical anchor for the country's energy future.

The SGR ecosystem comprises over 1,000 companies. However, as industry expectations shift towards greater participation in full project delivery, localisation, and regional export markets, many local companies remain constrained by gaps in capability, scale, and integrated delivery capacity. Therefore, these constraints limit their ability to consistently undertake and execute complex projects end-to-end.

This SGR Ecosystem Blueprint provides the strategic foundation for that transformation. Aligned with State and national policies, the SGR Ecosystem Blueprint sets out how the ecosystem can be strengthened to support Malaysia's next era of energy growth, while delivering sustained benefits for Sarawakians and industry stakeholders.



1,000+

companies within SGR ecosystem registered in year 2026



70%

of SGR ecosystem companies are Sarawakian companies as of Q2 2026

To unlock this potential, there are targeted interventions across five priority areas. These pillars form the backbone of SGR Ecosystem Blueprint.

INDUSTRY DEMAND

As Sarawak's SGR ecosystem grows to more than 1,000 players, with most SMEs concentrated in supporting scopes, there is an increasing need for stronger coordination, capability development, and industry collaboration. With a pipeline of major developments, including deep-sea ports, supply bases, energy infrastructure, and downstream industrial projects, demand for products, services, and technical capabilities is set to increase substantially in the coming years. Greater visibility of future industry requirements will enable local firms to align investments, build capacity, enhance competitiveness, and progressively move into more complex and higher-value segments of the industry, supporting the long-term growth and resilience of Sarawak's industrial ecosystem.

INFRASTRUCTURE

Sarawak has a growing and developing infrastructure, including three fabrication yards and one oil and gas supply base.

Upcoming SGR projects require larger, more advanced yards for platforms, petrochemical units, and carbon capture facilities, supported by supply bases for offshore and industrial logistics.

TECHNOLOGY

The transition to a lower-carbon energy future creates significant growth opportunities, while also requiring greater adoption of new technologies and stronger investment in innovation.

Although many ecosystem players see potential to leverage existing capabilities in emerging energy sectors, diversification efforts remain at an early stage.

Strengthening technical expertise through strategic partnerships, access to innovation and intellectual property, and closer collaboration with academia will be key to accelerating participation in these opportunities.

CAPABILITY

Talent pipeline constraints remain a critical barrier to the effectiveness of the SGR, limiting the ability of local companies to scale and compete within the industry. Rapid industry growth is increasing demand for skilled talent, but misalignment between workforce capabilities and industry needs continues to affect readiness and delivery.

Despite growing demand for workforce expansion, a recent survey found that the majority of industry players struggle to hire experienced technical talent. This highlights the critical need for an integrated talent ecosystem that can respond to evolving industry demands.

FINANCING

Access to financing remains a key challenge for many businesses.

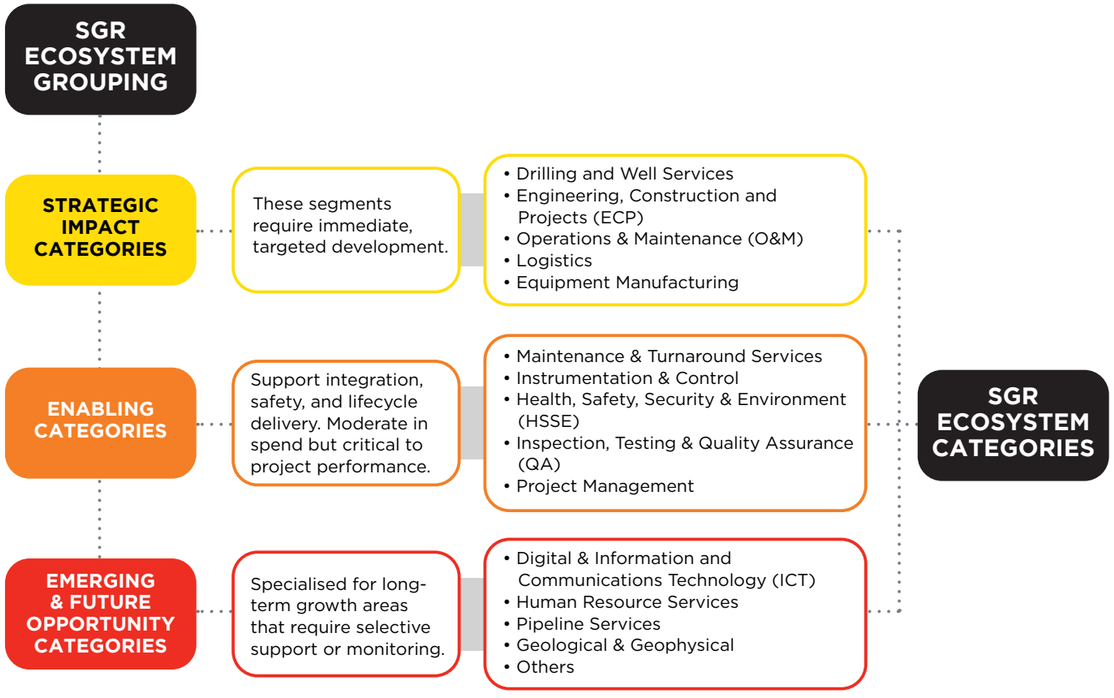
While conventional funding avenues can be difficult to navigate, there is growing openness towards alternative financing models.

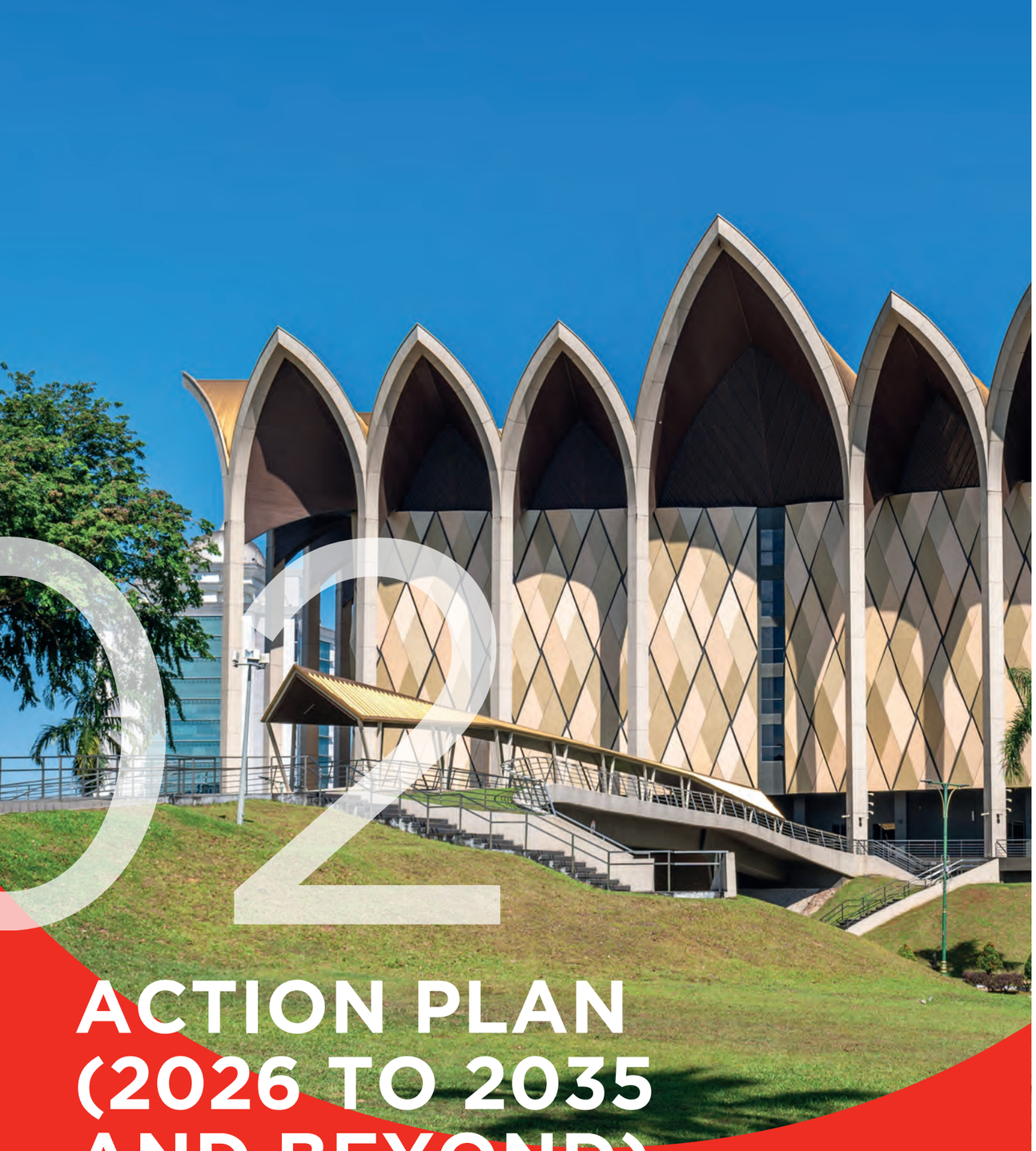
This presents an opportunity to broaden the financial ecosystem and enhance access to capital for Sarawak-based firms.



Five categories within Sarawak's energy sector landscape have been identified as areas of the highest strategic and economic significance, where local vendor capability remains underdeveloped. This Blueprint introduces a development model that prioritises support for these strategic categories.

With strong demand and clear State commitment, Sarawak is well-positioned to elevate the energy and industrial services sector from support to leadership.





02 ACTION PLAN (2026 TO 2035 AND BEYOND)

All programmes are designed to be delivered over three phases. While all flagship programmes are targeted to be launched in Phase 1 to establish momentum, non-flagship programmes focused on capability development, technology adoption, talent, and financing are expected to be rolled out progressively, with some commencing in Phase 1 and continuing across subsequent phases. Across the phases, programmes will transition from mobilisation to capability building and ultimately to lasting value creation.

SGR Ecosystem Roadmap Phased Execution

PHASE 1
2026 to 2030

12 Programmes

Build core foundations

1. SGR Activity Horizon
2. Fabrication Yard Development
3. Supply Base Development
4. SGR Industrial Capability Programme
5. Expert Talent Attraction
6. SGR Enterprise Excellence
7. SGR Strategic Partnerships
8. Financing Facilitation
9. Sarawak Company Certification
10. Alignment of SGR Ecosystem with Sarawak Policies
11. Logistics Hub Development
12. Sarawak Talent Development Framework & Information System

PHASE 2
2030 to 2035

15 Programmes

Deepen and broaden delivery

1. SGR Activity Horizon
2. Fabrication Yard Operationalisation
3. Supply Base Operationalisation
4. SGR Industrial Capability Programme
5. Expert Talent Retention
6. SGR Enterprise Excellence
7. SGR Strategic Partnerships
8. Financing Facilitation
9. Sarawak Company Certification
10. Alignment of SGR Ecosystem with Sarawak Policies
11. Logistics Hub Operationalisation
12. Sarawak Talent Development Framework & Information System
13. SGR Industry Portal
14. SGR Technology Network
15. SGR Catalyst Programme

PHASE 3
2035 and beyond

15 Programmes

Sustain and expand reach

1. SGR Activity Horizon
2. Fabrication Yard Expansion
3. Supply Base Enhancement
4. SGR Industrial Capability Programme
5. Expert Talent Centre of Excellence
6. SGR Enterprise Excellence
7. SGR Strategic Partnerships
8. Financing Facilitation
9. Sarawak Company Certification
10. Alignment of SGR Ecosystem with Sarawak Policies
11. Logistics Hub Operationalisation
12. Sarawak Talent Development Framework & Information System
13. SGR Industry Portal
14. SGR Technology Network
15. SGR Catalyst Programme

ACTION PLAN (2026 TO 2035 AND BEYOND)

Timeline Roadmap

2026 — 2030 — 2035 — Beyond

2026 to 2030

FOUNDATION & ACCELERATE

All flagship programmes will be launched to set the pace for SGR ecosystem, establishing visibility through SGR Activity Horizon, strengthening vendor and workforce development, initiating infrastructure planning, and activating financing and talent platforms.

Enabling measures such as certification, policy alignment, SGR Industry Portal, and talent frameworks will also be rolled out to complement the flagships.

Category-specific efforts in fabrication and logistics will begin in tandem, laying a strong base for growth.

2030 to 2035

SCALE & EXPAND CAPABILITIES

The emphasis will shift towards scaling up flagship programmes - advancing vendor upskilling, facility development, structured partnerships, and wider financing options.

New ecosystem programmes such as SGR Technology Network and SGR Catalyst Programme will be launched to accelerate technology adoption, innovation pilots, and formalised talent development.

Together, these programmes broaden Sarawak's delivery capacity and position the energy and industrial services sector to capture SGR opportunities.

2035 and beyond

SUSTAIN & LEAD

By the final phase, flagship programmes will be embedded as core pillars of Sarawak's energy and industrial ecosystem. The priority is to sustain infrastructure, talent pipelines, and financing while adapting to evolving State and SGR priorities.

Supporting ecosystem programmes will serve as adaptive enablers, supporting continuous innovation, resilience, and long-term competitiveness.





03

ECOSYSTEM PROGRAMMES

Flagship Programmes

Other Ecosystem Programmes

Focus on Strategic Categories

ECOSYSTEM PROGRAMMES

The SGR Ecosystem Blueprint sets out 15 strategic programmes within the ecosystem's focus areas to strengthen the ecosystem. They are:

1. SGR Activity Horizon
2. Fabrication Yard Development
3. Supply Base Development
4. SGR Industrial Capability Programme
5. Expert Talent Attraction
6. SGR Enterprise Excellence Programme
7. SGR Strategic Partnerships
8. Financing Facilitation Programme
9. Sarawak Company Certification
10. Alignment of SGR Ecosystem with Sarawak Policies
11. Logistics Hub Development
12. SGR Industry Portal
13. SGR Technology Network
14. SGR Catalyst Programme
15. Sarawak Talent Development Framework and Information System

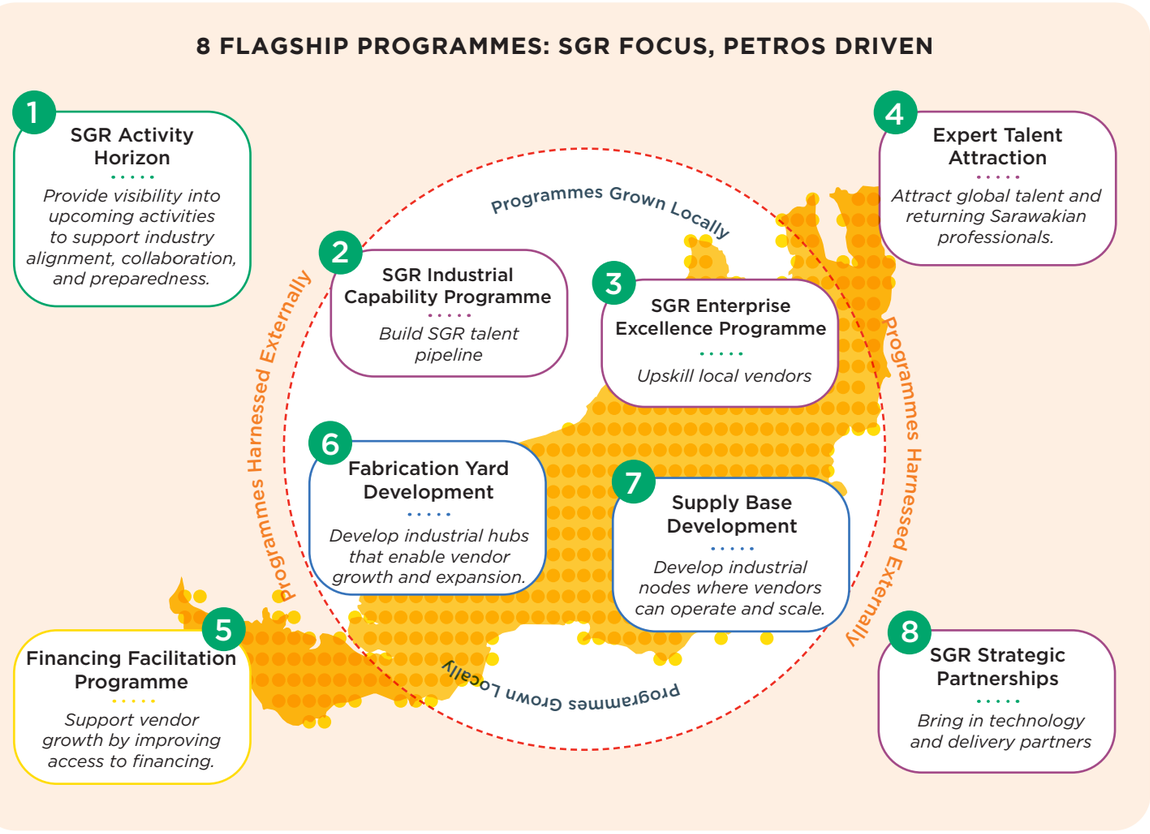
Each programme addresses a specific enabler, ensuring that efforts are focused where they will have the greatest impact. Together, they establish a clear framework for coordinated action and cross-sector collaboration.



FLAGSHIP PROGRAMMES

Among the 15 programmes, 8 have been identified as flagship programmes to accelerate the industry's shift towards innovation-led and progressive growth.

SGR Ecosystem Flagship Programmes



Industry Demand

SGR ACTIVITY HORIZON

SGR Activity Horizon is designed to provide a forward-looking view of planned and potential projects related to SGR across the gas value chain, including upstream, midstream, petrochemical, power plants and emerging sectors, such as CCUS. It serves as the primary reference for industry players, investors, policymakers, and service providers involved in Sarawak's energy development.

KEY OBJECTIVES

Transparency & Predictability
Offer visibility on upcoming activities in Sarawak's oil and gas and new energy sectors, timelines, and investment priorities to facilitate strategic planning and resource alignment.

Ecosystem Alignment
Foster collaboration across the public and private sectors, including investors and service providers, through shared understanding of demand and supply dynamics.

Capability Development
Identify emerging demand areas to inform needs for skills development, infrastructure planning, and local enterprise participation strategies.

Investment Promotion
Support investor confidence by highlighting opportunities and showcasing Sarawak's long-term energy potential and project pipeline.

Low-Carbon Economy Transition
Outline Sarawak's energy transition agenda, including decarbonisation programmes and emerging low-carbon opportunities, in alignment with the State's energy transition goals.

STRATEGIC RATIONALE

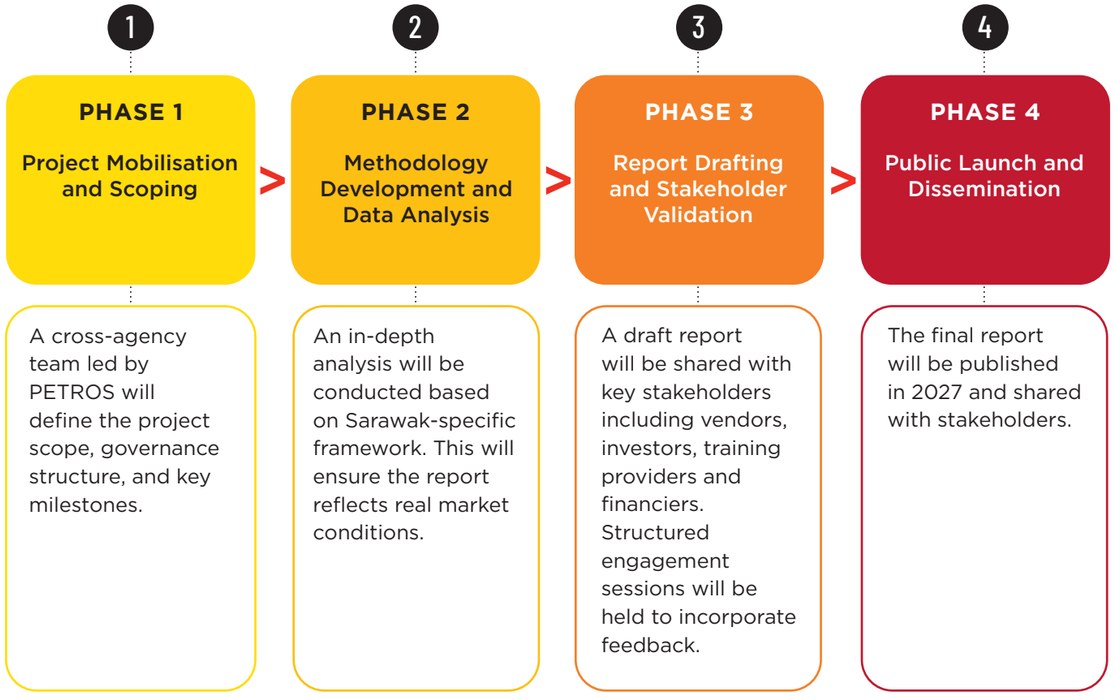
Sarawak is increasingly recognised at the national level as a key contributor for Malaysia's energy future, with Prime Minister Datuk Seri Anwar Ibrahim affirming the State's potential to become a principal energy hub for Malaysia and the wider ASEAN region. This recognition reflects Sarawak's unique strengths such as substantial gas reserves, expanding industrial infrastructure, and increasing autonomy in managing its resources. As Sarawak's energy landscape advances, there is a clear need for structured, State-specific policies that align with its economic priorities, policy ambitions, and investment outlook.

To fully realise this growth opportunity, stakeholders need timely, reliable, and Sarawak-specific demand signals, particularly in gas, midstream, and emerging transition sectors. Current market forecasts are largely national in focus and lack the granularity to reflect Sarawak's distinct project pipeline, State-specific regulatory processes and approval milestones and infrastructure rollout timelines.

With clearer visibility on upcoming activities, vendors can plan ahead, investors can assess opportunities with greater confidence, while training providers and financiers can align efforts to actual market needs. As Sarawak advances its ambitions in CCUS, and downstream industrialisation, a transparent, medium to long-term outlook will be essential to coordinate infrastructure, capital, and talent across the energy ecosystem.

SGR Activity Horizon is designed to meet this need. It will act as a central coordination reference, aligning operators, vendors, and investors around a shared view of future demand. By strengthening visibility, SGR Activity Horizon will drive earlier vendor mobilisation, improve investment readiness, and reinforce Sarawak's position as a competitive and connected energy hub.

IMPLEMENTATION APPROACH





STRATEGIC WINS

SGR Activity Horizon is designed to be more than a publication, it is a strategic tool to build trust, enable collaboration, and unlock growth for the State's energy sector.

- A detailed forecast of planned and potential activities across the oil and gas value chain in Sarawak and new energy sectors, and timeline.
- A breakdown of upcoming work scopes (e.g. drilling, fabrication, marine, logistics) to support supplier capacity and capability planning.
- Clear indication of local vendor opportunities to support Sarawak's local content development.
- Priority investment areas highlighted, aligned with SGR, and energy transition goals.
- Potential integration with a digital dashboard to allow frequent updates and stakeholder engagement.

IMPLEMENTATION PARTNERS

PETROS' collaboration partners include:

- Industry stakeholders and project owners to gather accurate demand data and validate outlook findings.
- Ecosystem enablers to link demand forecasts to workforce development, vendor readiness, and infrastructure planning.

Infrastructure

FABRICATION YARD DEVELOPMENT

Fabrication Yard Development aims to develop a fit-for-purpose, high-capacity fabrication facility to support the State's growing demand for large, complex infrastructure modules. The facility will serve as a strategic enabler of Sarawak's energy and industrial ambitions, supporting projects across offshore platforms, CCUS, petrochemicals and power plant infrastructures. It will also enable local companies to scale their participation in major projects and co-locate within an integrated industrial ecosystem.

KEY OBJECTIVES

Capacity Scaling
Develop the facility to support large-scale modular fabrication, aligned with projected demand from SGR and new energy projects.

Scope Readiness
Equip the facility to deliver fabrication work scopes across multiple energy segments, from traditional upstream, to low-carbon and downstream industrial applications.

Delivery Efficiency
Reduce project lead times and logistics complexity by establishing in-state capacity to execute high-value fabrication work.

Vendor Ecosystem Integration
Provide shared operational space and co-location opportunities for local companies to participate in project execution, testing, and support services.

STRATEGIC RATIONALE

Sarawak's energy infrastructure pipeline is advancing, with the SGR Ecosystem Blueprint projecting an approximate three-fold increase in demand for large-scale modular and complex fabrication over the next decade. Projects such as CCUS facilities and large petrochemical complexes will require infrastructure that meets new standards for size, integration, and environmental performance.

A fit-for-purpose fabrication facility is needed to meet this demand, not only in terms of capacity, but also technical capability, quality control, and logistics flow.

This initiative will be closely integrated with the SGR Activity Horizon to align yard development with demand visibility, supported by the SGR Enterprise Excellence Programme to ensure a pipeline of certified local vendors, and complemented by talent and financing programmes to strengthen workforce readiness and execution capacity.

Sarawak Fabrication Demand Drivers (2026 - 2040)

Offshore Facilities

Topsides, jackets, and modular skids for new platforms and retrofits.

Power Plants

Pressure vessels, turbine modules, and piping systems.

Petrochemicals

Large-scale process units, reactors, and pipe racks.

CCS / CCUS

Offshore injection platforms, compression skids, and wellhead structures (excluding long-distance pipelines).

IMPLEMENTATION APPROACH

PHASE 1
Feasibility and Developer Selection

Demand is validated, technical feasibility is assessed, and a suitable developer is identified through a structured selection process.

PHASE 2
Detailed Design

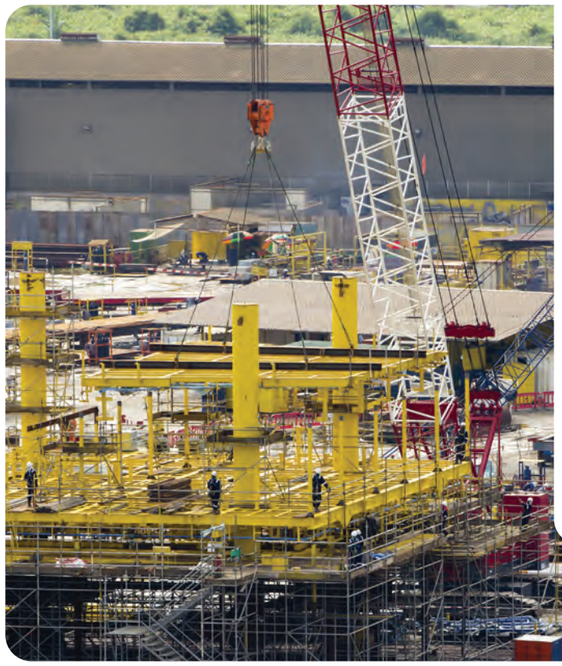
A concept design is developed and regulatory, land, and environmental approvals are secured to prepare for construction.

PHASE 3
Construction and Infrastructure Setup

The fabrication yard infrastructure will be built in phases, with core facilities such as plate cutting lines, panel lines, assembly areas and enclosed workshops ready to support project requirements.

PHASE 4
Commissioning and Operationalisation

The yard will begin operations with pilot fabrication works and gradual ramp-up to full capacity.



Whether through expansion or greenfield development, the facility will serve as a visible anchor of Sarawak's industrial capability and its commitment to local value creation.



STRATEGIC WINS

- Fabrication facility with capacity and capability to deliver multi-sector modules for high-value projects.
- Increased participation of local vendors in fabrication work scopes, supported through supply of materials, components and services to the yard, with coordinated integration into project delivery.
- Improved project delivery timelines and cost-efficiency through reduced external mobilisation and enhanced local readiness.
- Recognition of Sarawak as a regional hub for energy-related modular fabrication.

IMPLEMENTATION PARTNERS

This programme will be driven by PETROS, who will:

- Appoint technical consultants to determine the detailed requirements for the yard.
- Undertake selection of partners to invest and develop the fabrication facility.
- Coordinate the feasibility assessment, development, construction or the operationalisation of the fabrication yard.

SUPPLY BASE DEVELOPMENT

Supply Base Development aims to develop an onshore logistics facility to support both offshore and onshore oil and gas operations and CCUS activities in Sarawak. Potentially well-positioned for emerging offshore developments, the facility will improve mobilisation efficiency, reduce dependency on remote supply bases, and strengthen Sarawak's offshore logistics and delivery ecosystem.

KEY OBJECTIVES

Improve Logistics Efficiency
Reduce vessel turnaround time and mobilisation costs for upcoming onshore and offshore campaigns in Sarawak.

Multi-User Access
Enable shared access to berthing, warehouse storage, and marine services for SGR ecosystem players and operators.

Future Flexibility
Equip the base to support current and emerging demands, including CCUS.

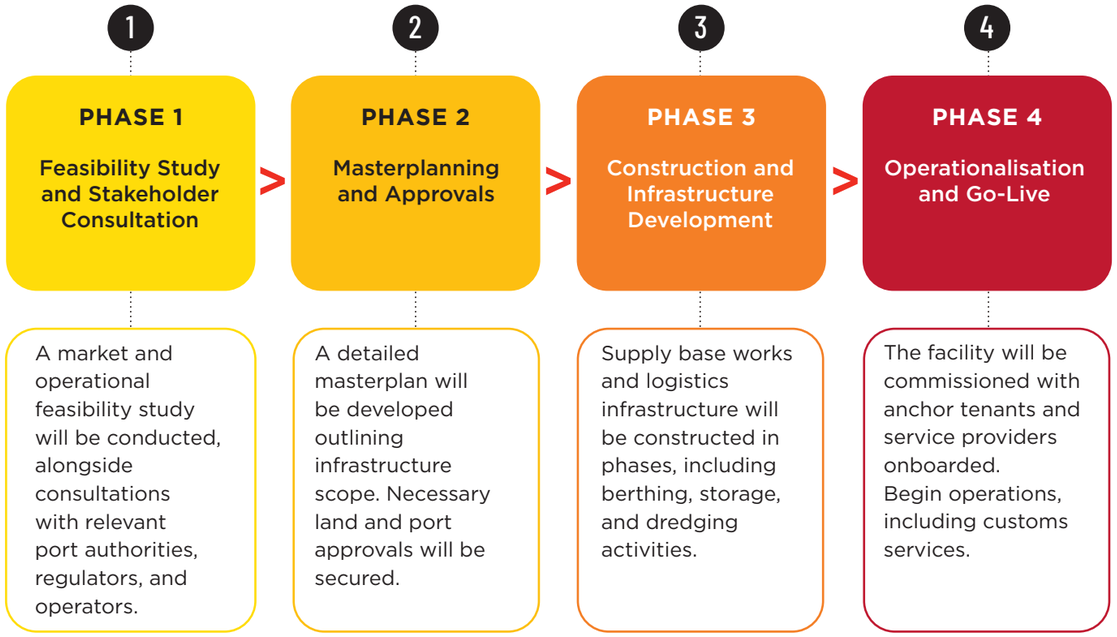
STRATEGIC RATIONALE

Exploration and development activities in Sarawak are expected to increase significantly, particularly across onshore and offshore gas as well as CCUS developments.

The development of a supply base presents a strategic opportunity to localise key logistics functions and unlock cost and time savings. Unlike conventional port facilities, a multi-user supply base is a fit-for-purpose logistics hub equipped to serve multiple offshore operators and service providers. It offers shared berthing, warehousing, storage, fuel bunkering, and staging areas, while enabling co-location of service vendors and centralised operations management, supporting faster turnaround and improved coordination.

The facility will also create new business opportunities for local SGR ecosystem players, particularly those providing marine support services, supply chain and logistics solutions and brownfield maintenance services. This initiative aligns with the SGR and the State's broader ambition to localise value, strengthen the infrastructure, and support the energy transition supply chain.

IMPLEMENTATION APPROACH



STRATEGIC WINS

- A fully operational onshore supply base dedicated to supporting onshore and offshore activities in Sarawak.
- Logistics cost reduction of up to 20% for regional offshore operations.
- Improved readiness for future offshore scopes, including renewables and green marine infrastructure.

IMPLEMENTATION PARTNERS

Supply base development will be driven by PETROS with collaboration partners including:

- Business partners for the development and operation of the supply base.
- Operators and offshore contractors to ensure the facility meets current and future logistics needs.
- Selected experienced or established supply base developers or operators to determine the detailed requirements of the supply base.

Capability

SGR INDUSTRIAL CAPABILITY PROGRAMME

The programme addresses skills and certification gaps in areas such as offshore welding, mechanical fitting, and other key trades, therefore strengthening local workforce capability and enhancing readiness for upcoming projects.

KEY OBJECTIVES

Workforce Readiness
Equip Sarawakians (from school leavers to mid-career professionals) with the technical skills and professional behaviours needed to meet real industry demands.

Certification and Standards
Deliver accredited training that is recognised by both local and international industry bodies, particularly for high-demand trades like mechanical, instrumentation and electrical engineering.

Soft Skill Development
Prepare tertiary education students with workplace-ready behaviours through targeted industry-aligned programme.

Community Talent Activation
Engage school students and underserved communities through grassroots Science, Technology, Engineering and Mathematics (STEM) or Technical and Vocational Education and Training (TVET) awareness and career exposure.

Job-ready Graduates
Link all training efforts to actual industrial placements with employers across Sarawak.

STRATEGIC RATIONALE

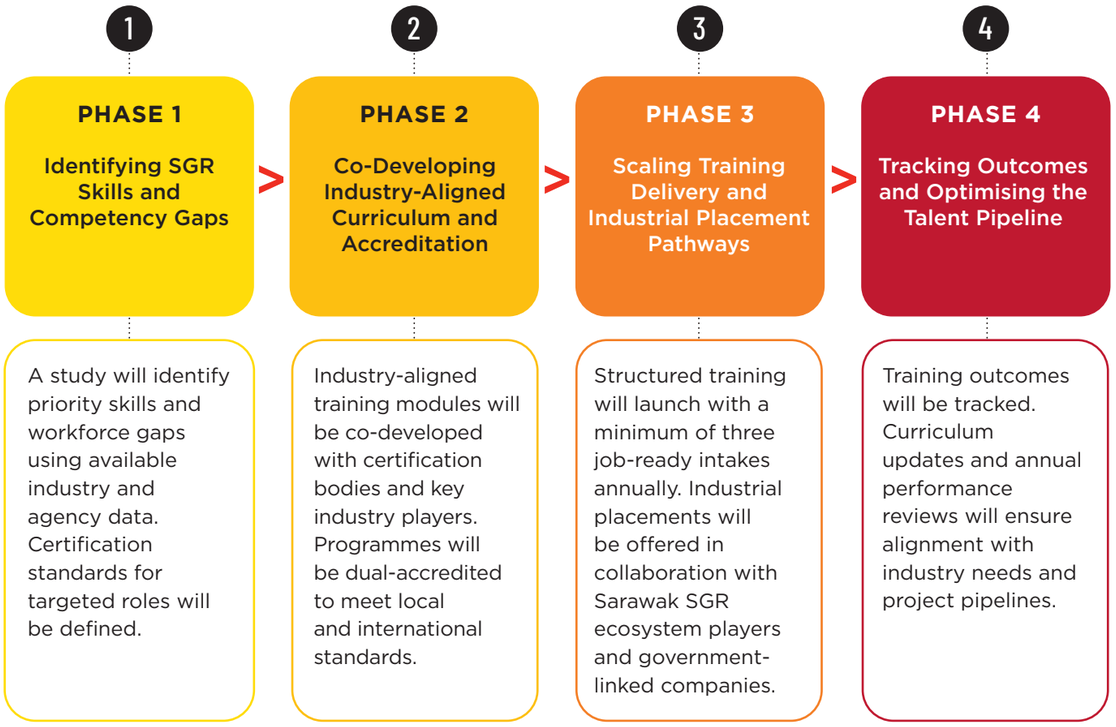
Sarawak's economic growth depends heavily on developing talent with the right skills, technical capabilities, growth mindset and a strong sense of purpose to help drive the State's long-term development. Studies by the Ministry of Education, Innovation and Talent Development (MEITD) suggest that a very large number of skilled workers will be needed in the long run to support the upcoming SGR-related projects, making talent development an important focus for the state.

As the oil and gas sector continues to be a key driver of Sarawak's economy, there is a growing need to develop local talent for roles across offshore operations, fabrication, CCUS and low-carbon infrastructure. Sarawak has a strong base of technically capable workers, but unlocking their full potential requires wider access to structured, industry-aligned training and certification in high-demand trades such as offshore welding, instrumentation, and mechanical fitting.

SGR Industrial Capability Programme responds directly to this need by providing certified and dual-accredited training pathways tailored to the State's evolving energy landscape. It supports the broader goals of MEITD by linking training to real project needs and industrial placement opportunities, and increasing job readiness for SGR projects.

By developing a future-ready and industry-ready workforce, this initiative will equip Sarawak's youth, Technical and Vocational Education and Training (TVET) graduates, and mid-career professionals with the skills and capabilities needed to participate in energy transition projects, access high-value employment opportunities and contribute to the State's industrial transformation.

IMPLEMENTATION APPROACH



STRATEGIC WINS

- Achieve 50% local participation in high-skill roles, including returnees and new regional talent.
- Register and engage 50+ regional or international candidates annually.
- Strengthened alignment between industry demand, training quality, and talent deployment across the Sarawak SGR ecosystem.

IMPLEMENTATION PARTNERS

The programme will be driven by PETROS, with collaboration from:

- National and State training agencies and institutions to deliver certified curriculum and training centres.
- Accreditation and certification bodies to ensure training standards match market and safety standards, including internationally recognised certifications.
- National and local industry players, to provide placements and job-matching opportunities.
- Ecosystem enablers, including the oil and gas industry council to support tracking and ongoing alignment with workforce priorities.

EXPERT TALENT ATTRACTION

The Expert Talent Attraction initiative is designed to bring specialised expertise and capabilities to Sarawak, with the aim of positioning the State as an attractive destination for highly skilled professionals within the SGR ecosystem. The initiative focuses on attracting global talent with specialised expertise, while also encouraging experienced Sarawakians working overseas to return and contribute to the State's development. It addresses critical skill gaps in specialised roles by simplifying outreach, work permit processes, and job placement support while contributing to a stronger and more sustainable talent pool over time.

KEY OBJECTIVES

Fill Capability Gaps
Attract experts in technical, commercial and strategic roles.

Engage Returnees and Experts
Create pathways for Sarawakians abroad, and experts to contribute to SGR roles.

Facilitate Access
Work with relevant agencies and authorities to facilitate work permit processes and support to reduce barriers to recruitment.

Strengthen Talent Ecosystem
Leverage external expertise to build local workforce development and prepare Sarawak for emerging SGR opportunities.

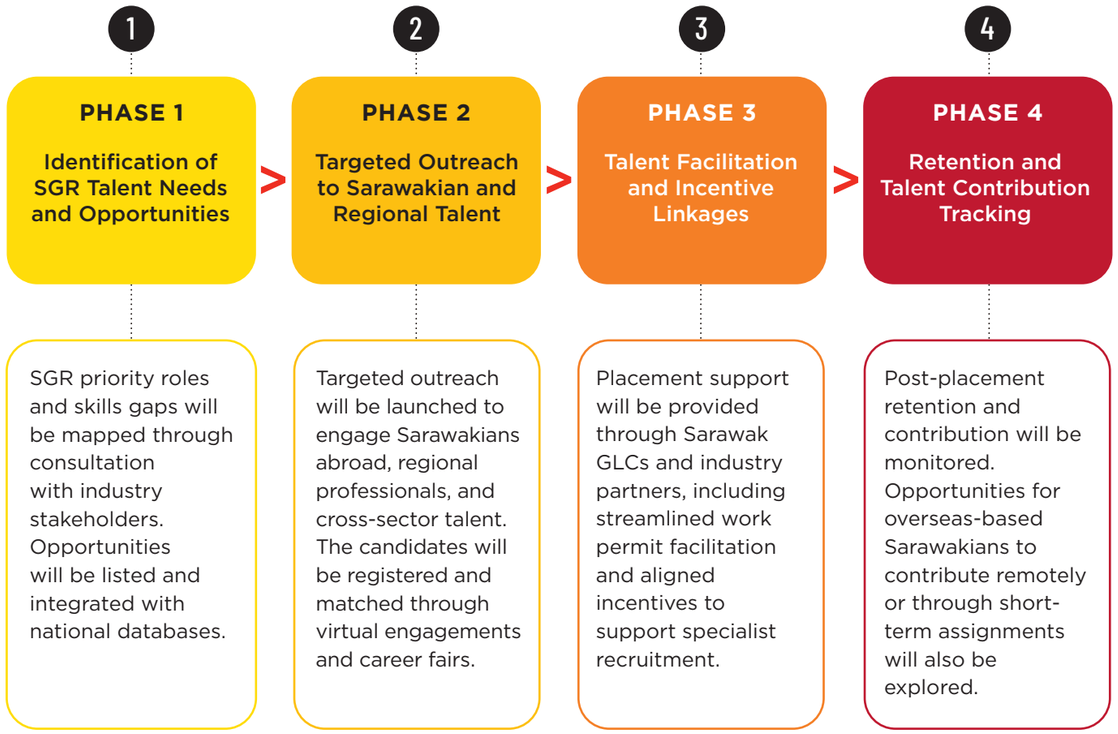
STRATEGIC RATIONALE

As Sarawak's energy and industrial services sector continues to expand across offshore gas, CCUS, and low-carbon infrastructure, there is increasing demand for professionals with specialised technical, commercial, and strategic capabilities. While Sarawak has a strong local workforce, the industry continues to face gaps in mid-to-senior level expertise, particularly in areas such as engineering, instrumentation, planning, and asset management.

At the same time, many skilled Sarawakian professionals remain working abroad or have shifted to related industries, resulting in a shortage of experience & capability in the State. Addressing these gaps by attracting returning Sarawakian talent and engaging international experts with niche expertise will strengthen readiness for critical projects. This enables Sarawak to proactively attract, integrate, and retain specialist talent, ensuring readiness for current and future energy infrastructure.

It also supports broader ambitions under MEITD's workforce targets, while aligning with ecosystem programmes like the SGR Industrial Capability Programme and the SGR Enterprise Excellence Programme.

IMPLEMENTATION APPROACH



STRATEGIC WINS

- Achieve 50% local participation in high-skill roles by 2030, including returnees and new regional talent.
- Improve specialist placement and retention outcomes through streamlined work permit facilitation and structured post-placement tracking and feedback surveys.
- Strengthen Sarawak's brand as a preferred destination for high-impact professionals

IMPLEMENTATION PARTNERS

The programme will be driven by PETROS, with collaboration from:

- Sarawak Immigration and Labour Departments to streamline permit and compliance procedures.
- TalentCorp, MEITD, and training institutions to align outreach and placement pathways.
- Sarawak GLCs and key industry players to offer structured placement and mentoring programmes.
- Industry associations and professional networks to amplify outreach and engagement.

SGR ENTERPRISE EXCELLENCE PROGRAMME

SGR Enterprise Excellence Programme aims to build a stronger pool of Sarawak-based vendors capable of delivering higher-value work across the oil, gas, and energy transition sectors. The programme supports Sarawak-based vendors in upskilling, obtaining relevant certifications, and accessing capability enhancement opportunities through potential participation in PETROS-led projects.

KEY OBJECTIVES

Capability Uplift
Support Sarawak-based vendors to progress into higher-value contracting roles through technical and operational improvement.

Inclusive Growth
Ensure more Sarawak-based vendors are equipped to participate meaningfully in upcoming project scopes under the SGR.

Transition Readiness
Prepare vendors for future opportunities in CCUS, and low-carbon infrastructure through targeted development support.

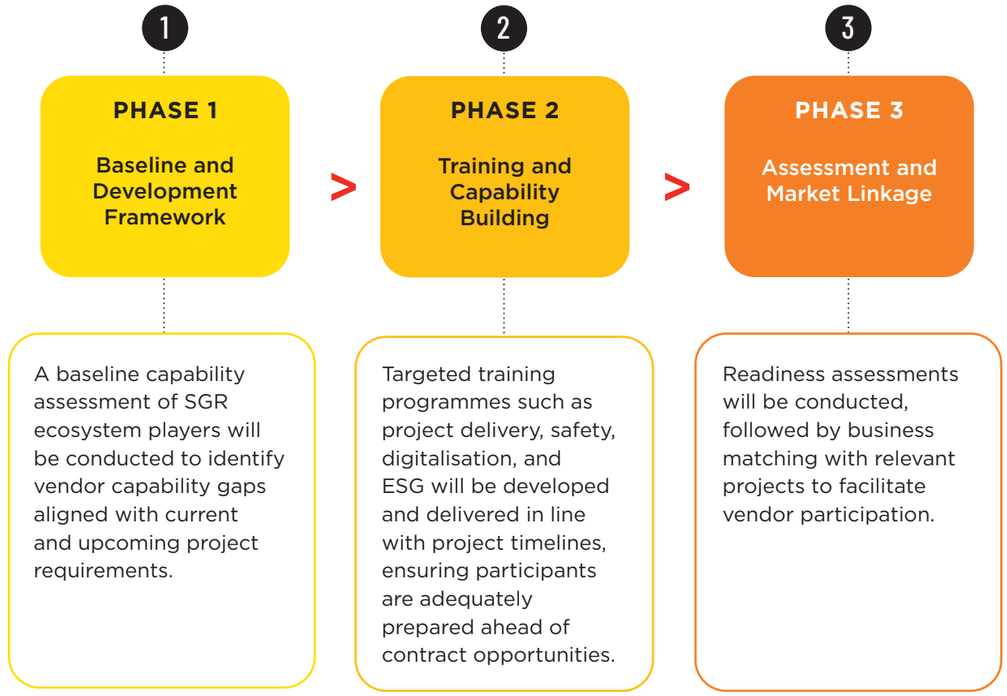
STRATEGIC RATIONALE

Sarawak's vision to become a high-income, developed state relies on building a strong, self-sustaining local industrial base. The energy and industrial services sector plays a vital role in this effort, not only in supporting the energy value chain, but also in creating high-skilled jobs and stimulating local enterprise development. In recent years, Sarawak-based vendors have taken on more scopes and delivered successfully across upstream, downstream, and infrastructure projects, reflecting growing maturity and readiness.

To sustain this progress, Sarawak must strengthen the capabilities of its vendors through structured development pathways. This includes upskilling, technical certification, and facilitating access to high-value project opportunities. As noted in State-level engagements, there is a clear ambition for local vendors to move beyond supporting roles and take on lead roles in projects, allowing more value to be created locally and strengthening the industry over the long term.

The SGR Enterprise Excellence Programme provides a structured approach to strengthen vendor capabilities, enabling Sarawak-based vendors to scale sustainably, deliver competitively and participate more effectively in SGR-related projects and the State's energy transition agenda.

IMPLEMENTATION APPROACH



STRATEGIC WINS

SGR Enterprise Excellence Programme is more than a training initiative. It is a strategic platform to unlock vendor growth, strengthen local participation, and build a competitive, robust SGR ecosystem for Sarawak.

- Local vendors onboarded and trained under the SGR Enterprise Excellence Programme, with targets for Tier-1 readiness to be determined following the baselining and benchmarking analysis. Tier-1 contractors are defined as: Principal or Prime Contractors - Engineering, Procurement, Construction and Commissioning (EPCC) services or managing major offshore/ onshore facilities.
- Increased inclusion of Sarawakian vendors in project bidding and main contractor pools, with targets for certified vendors in high-value opportunities to be set after the baseline and benchmarking analysis.

IMPLEMENTATION PARTNERS

The programme will be driven by PETROS, with collaboration from:

- Relevant stakeholders to align with State industrial priorities and local content aspirations.
- Certification bodies and training providers to ensure programme quality and industry relevance.
- Industry associations and project owners to shape business matching sessions and ensure vendor readiness matches project needs.
- Financial institutions and government-linked funds to explore financing support for certified vendors scaling operations.

SGR STRATEGIC PARTNERSHIPS

SGR Strategic Partnerships is designed to build the industry ecosystem and strategic capabilities needed to support the delivery of the SGR. The programme connects high-potential Sarawak-based industry players with suitable business partners, creating strategic pathways for greater local participation and long-term value for Sarawak. Through a facilitated partner-matching process, both parties can explore and establish mutually beneficial partnership arrangements.

KEY OBJECTIVES

Promote Technology Transfer
Support adoption of technologies such as advanced manufacturing, digital project delivery, and low-carbon systems via joint development or licensing.

Facilitate Investment and Contract Access
Help SGR ecosystem players build investment-ready partnerships and secure project-linked contracts and scopes aligned with State-level demand.

Strengthen Regional Positioning
Position Sarawak companies as credible partners for regional projects through enhanced capabilities and credibility.

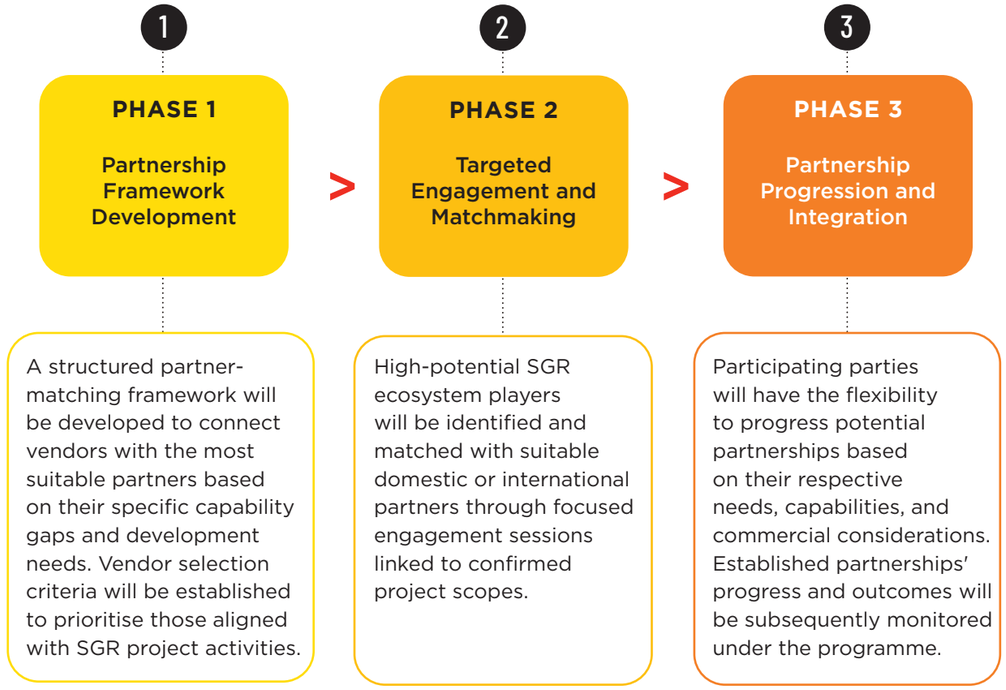
STRATEGIC RATIONALE

While Sarawak's energy and industrial services sector continues to expand in scope and delivery capacity, many vendors still face challenges in accessing capital and developing specialised capabilities required to compete in higher-value opportunities. On the other hand, sectors with existing capabilities may face challenges in commercialising their expertise or gaining access to larger contract packages. Traditional vendor development approaches alone may not be sufficient for companies to scale rapidly or address gaps in technology adoption, financial capacity, and project experience.

Strategic partnerships provide a complementary pathway for vendors to overcome structural barriers, accelerate technology adoption, and strengthen their competitiveness in tendering processes. Industry feedback indicates strong interest in partnership opportunities, with many firms identifying technical capability as a key constraint to participating in the energy transition sector.

By facilitating partner-matching process between local vendors and strategic partners, the partnerships will be shaped by the participating parties based on their respective needs, capabilities, and commercial considerations, while contributing towards Sarawak's broader ambitions under the SGR.

IMPLEMENTATION APPROACH



STRATEGIC WINS

SGR Strategic Partnerships strengthens vendor growth by creating pathways to larger contracts, broader market access, and scalable revenue opportunities, enabling technology transfer, new market entry, and contract awards through structured partnership deal execution.

IMPLEMENTATION PARTNERS

The programme will be driven by PETROS, with collaboration from:

- Relevant stakeholders to align partnership facilitation with Sarawak's industrial strategies and priority sectors.
- Industry associations and key industry players to identify partnership opportunities and connect vendors to relevant project scopes.
- Technology providers and research institutions to enable knowledge transfer, co-development, and innovation-led collaborations.

Financing

FINANCING FACILITATION PROGRAMME

The Financing Facilitation Programme aims to improve access to financing facilities for SGR ecosystem players. It focuses on enhancing investment readiness, increasing awareness of available financing schemes, and encouraging the use of a broader range of financing solutions beyond traditional loans. These efforts will enable companies to invest in capability development, expand operations, and participate in higher-value projects. The programme will also explore different funding mechanisms to support workforce development and strengthen long-term talent and capability development.

KEY OBJECTIVES

Financing Access
Consolidate and simplify access to government, commercial, development bank, and private financing schemes.

Bankability Support
Guide SGR ecosystem players to improve documentation, credit readiness, and eligibility for funding.

Transparency and Monitoring
Track disbursement, approval outcomes, and financing impact across the ecosystem.

Financial Literacy
Promote financial literacy within the SGR ecosystem to build stronger financial capability and resilience.

Alternative Financing Uptake
Promote use of venture capital, equity, and other non-traditional instruments.

STRATEGIC RATIONALE

Access to financing remains one of the most persistent barriers for SGR ecosystem players in Sarawak. Many firms need stronger financial readiness and governance to improve financing approval rates and build greater confidence among banks.

At the same time, the need for capital is rising. Energy and industrial services companies require financing to adopt new technologies, scale capabilities, and qualify for energy transition projects. While the majority of vendors are open to alternative options such as equity or venture funding, there is limited awareness and visibility into these instruments in Sarawak.

This programme drives collaboration with financial institutions to address these challenges effectively. It supports the broader industrialisation goals of the SGR and aligns with the blueprint's enabler pillar on capital access.

IMPLEMENTATION APPROACH

1 PHASE 1 — SME Engagement

Engage SGR ecosystem players to understand their financial challenges and capacity gaps. Insights will inform the design of support programmes tailored to actual market and project needs.

2 PHASE 2 — Financier Engagement

Engage financiers such as government agencies and banks to identify and align available financing schemes, products, and eligibility requirements with project timelines.

3 PHASE 3 — SME Communication

Conduct briefing sessions for pre-screened vendors and match them to relevant financing or development programmes. Programme rollout and subsequent monitoring will be paced according to SGR project activity, with new programmes introduced as demand evolves.

STRATEGIC WINS

- Enhanced support for funding access, applications and tracking across the SGR ecosystem.
- Improved financial readiness of local industry players.
- Increased adoption of alternative financing tools, such as private equity and structured project financing.

IMPLEMENTATION PARTNERS

The programme will be driven by PETROS, with collaboration from:

- SME banks and commercial lenders to offer product access and feedback.
- Policy agencies to align regulatory frameworks and incentives.
- SME associations and advisors to support programme delivery and readiness building.

OTHER ECOSYSTEM PROGRAMMES

The blueprint identifies seven key programmes that serve as enablers to strengthen industry capacity and capability, enhancing the competitiveness of State's energy and industrial services ecosystem in both domestic and regional markets.

7

Programmes Outlined

1. Sarawak Company Certification
2. Alignment of SGR Ecosystem with Sarawak Policies
3. Logistics Hub Development
4. SGR Industry Portal
5. SGR Technology Network
6. SGR Catalyst Programme
7. Sarawak Talent Development Framework and Information System

Industry Demand

SARAWAK COMPANY CERTIFICATION

KEY OBJECTIVES

Vendor Recognition
Introduce a State-recognised certification to improve the visibility, credibility, and procurement access of Sarawak SGR ecosystem players.

Quality Benchmarking
Set consistent compliance and capability standards to define accreditation criteria for Sarawak-based companies, aligned with Sarawak's delivery environment and long-term goals.

STRATEGIC RATIONALE

Sarawak's energy and industrial ecosystem is expanding rapidly, with many capable vendors ready to take on greater roles in the State's growing energy sector. To unlock their full potential and participation in SGR, vendors need a formal, State-recognised certification that recognises their Sarawak-based status, capabilities, and readiness to participate in SGR opportunities.

To address this, a Sarawak-specific company certification is being developed as part of ongoing work under the Joint Consultative Committee (JCC). The certification targets companies participating in Sarawak's energy and industrial services ecosystem, particularly local vendors supporting SGR-related opportunities. This certification provides a clear signal of quality and credibility, ensuring that local vendors are visible to project owners, recognised in procurement systems, and better positioned to access opportunities arising from SGR developments.

Positioned as a foundational enabler, this initiative complements programmes such as the SGR Enterprise Excellence Programme by offering a consistent validation mechanism to improve vendor visibility, and support procurement decisions.

HIGH-LEVEL APPROACH

- A structured certification framework will be developed, covering eligibility criteria, tiered recognition, and evaluation processes.
- Pilot assessments will be conducted to refine implementation, with full rollout enabled through digitalisation via the SGR Industry Portal to ensure transparency and ease of access.
- Certified vendors will be progressively embedded into procurement and vendor development pathways, with alignment to SGR Enterprise Excellence Programme as the certification framework continues to mature.

STRATEGIC WINS

This programme is expected to strengthen the visibility and credibility of Sarawak vendors by providing formal recognition aligned with SGR priorities. Certification may help companies gain greater access to project opportunities, financing, and capability-building programmes, while offering project owners a clearer view of qualified local partners.

Over time, this will support stronger local participation in Sarawak's energy ecosystem and contribute to the State's broader industrial development goals.

ALIGNMENT OF SGR ECOSYSTEM WITH SARAWAK POLICIES

KEY OBJECTIVES

Strategic Alignment
Strengthen industry-wide awareness and alignment with Sarawak's strategic direction in upstream and downstream gas development, hydrogen, and CCUS.

Informed Decision-Making
Support companies, financial institutions, and investors to make informed decisions aligned with State industrial development priorities.

Consistent Policy Communication
Promote consistent communication across government agencies, project developers, and industry stakeholders.

STRATEGIC RATIONALE

Sarawak is advancing an ambitious industrial agenda through Sarawak Gas Roadmap (SGR), Sarawak Energy Transition Policy (SET-P), Hydrogen Economy Roadmap 2035 and Sarawak Sustainability Blueprint 2030. As these frameworks shape the next wave of investments, vendors and investors must clearly understand how and where to participate. However, policy updates, funding opportunities, and industry initiatives are often fragmented across multiple platforms and agencies. As a result, many industry players face challenges in accessing timely and relevant information.

On a national level, the energy and industrial services sector has recognised policy clarity as a key development lever. The National OGSE Blueprint cites regulatory transparency and cross-agency alignment as foundational to investor confidence, industry readiness, and innovation uptake. Globally, successful energy hubs such as Norway and the UAE have shown that structured policy engagement improves vendor participation and accelerates private investment.

This initiative seeks to bridge the communication gap between Sarawak's evolving policy direction and industry actors on the ground. It will serve as a practical enabler, ensuring energy and industrial services companies, GLCs, and investors can track, interpret, and respond to State priorities in a coordinated and timely manner.

HIGH-LEVEL APPROACH

- A central communication strategy will be developed to translate key policy messages into practical guidance for SGR ecosystem players.
- This will be delivered through industry briefings, digital toolkits, strategic media partnerships, and integration into the SGR Industry Portal.
- A central repository of communication materials will support stakeholder engagement and be updated in line with major policy developments.

STRATEGIC WINS

This programme is expected to improve the SGR ecosystem's strategic alignment with Sarawak's policy direction, foster greater institutional coordination, and provide greater transparency to support informed decision-making by vendors and investors. It will also strengthen the credibility and visibility of Sarawak's energy narrative on both national and regional platforms.

Infrastructure

LOGISTICS HUB DEVELOPMENT

KEY OBJECTIVES

Integrate Aviation–Sea–Land Logistics
Establish a hub that consolidates helicopter, marine, and road logistics into a single operational ecosystem.

Improve Operational Efficiency
Enhance logistics and crew change efficiency, optimising transfer coordination, and lowering overall logistics costs for upstream and industrial users.

Enable Energy Transition Readiness
Equip the hub with facilities and systems to support large industrial projects through logistics and maintenance services.

Digitalise Logistics Coordination
Deploy a digital control-tower system for real-time tracking, scheduling, and data integration across multiple transport modes.

HIGH-LEVEL APPROACH

- Logistics hub development will begin by assessing the technical, commercial, and regulatory feasibility of developing an integrated logistics hub, engaging key transport and infrastructure authorities.
- It will then define the detailed infrastructure scope and secure all required land, environmental, and operational clearances.
- Construction will be implemented in phases to develop the core facilities and utilities needed to support multimodal logistics operations.
- The hub will be commissioned with anchor tenants and service providers onboarded, progressively expanding service capacity to meet growing operational needs.

STRATEGIC WINS

This programme will centralise supply, maintenance, and mobilisation, improving coordination and targeting a 20% gain in overall logistics efficiency.

STRATEGIC RATIONALE

Sarawak's next phase of growth will be driven by offshore gas, CCUS infrastructure, and downstream industrial parks. This will require seamless, multimodal logistics capability.

Sarawak's existing marine infrastructure provides a foundation to expand and integrate logistics capabilities across the state. Developing additional supply base capacity would support the transition towards a more integrated multimodal logistics system, enabling greater efficiency in serving offshore operations and broader industrial activities.

Logistics Hub Development aims to establish a fit-for-purpose, multimodal logistics hub in Sarawak that integrates aviation, marine, and land-based operations to support the State's expanding upstream, downstream, and energy transition activities.

It will serve as a central staging and coordination point for helicopters, marine vessels, warehousing, and maintenance, improving the flow of goods and personnel between offshore fields, fabrication sites, and industrial zones.

Technology

SGR INDUSTRY PORTAL

KEY OBJECTIVES

Centralised Access
Establish a central digital platform for Sarawak SGR ecosystem players to access programmes, policies, and project opportunities.

Transparency & Engagement
Enhance information visibility, streamline support access, and strengthen industry-government collaboration.

STRATEGIC RATIONALE

As Sarawak positions itself as a leading oil and gas and energy transition hub, SGR ecosystem players increasingly need efficient, unified access to public-sector programmes. Although many schemes exist across training, certification, financing, and vendor development, stakeholders often face fragmented visibility that limits participation and slows coordination.

A central digital platform offers an opportunity to consolidate these resources and provide a single, accessible point of contact for SGR ecosystem players. By leveraging lessons from the existing national i-OGSE system and tailoring the platform to local needs, the platform will strengthen Sarawak's delivery readiness and reduce entry barriers for local vendors and investors.

HIGH-LEVEL APPROACH

Strategic promotion across industry networks will encourage wider utilisation while continuous user feedback and system improvements will ensure the portal remains responsive and user-friendly.

STRATEGIC WINS

This programme will strengthen ecosystem coordination and improve programme participation. Over time, it will serve as a performance monitoring dashboard for SGR ecosystem development in Sarawak.

SGR TECHNOLOGY NETWORK

KEY OBJECTIVES

Collaborative Innovation
Establish a collaborative platform to connect SGR ecosystem players, researchers, and technology providers through Joint Industry Projects (JIPs), in alignment with the national direction to drive innovation.

Technology Deployment
Accelerate early-stage R&D, testing, and validation of new technologies to support industry innovation and readiness for future commercialisation.

STRATEGIC RATIONALE

Innovation in the energy and industrial services sector remains constrained by the lack of collaborative platforms connecting industry players, technology providers, researchers, and asset owners. This fragmentation reduces the speed of technology deployment and slows the adoption of solutions for offshore automation, carbon reduction, and energy efficiency. The SGR Technology Network can strengthen knowledge sharing, foster strategic collaboration, and create an ecosystem where JIPs are more actively initiated, funded, and scaled.

This initiative complements programmes such as the SGR Enterprise Excellence Programme and SGR Strategic Partnerships by strengthening vendor visibility mechanisms, accelerating technology development, and fostering ecosystem-wide innovation.

HIGH-LEVEL APPROACH

- SGR Technology Network will foster collaboration between industry, research institutions, and academia to ensure R&D activities are aligned with sector needs and emerging opportunities.
- JIPs will be structured to address priority technology areas, with coordinated support for project selection, development, testing, and market access.
- The initiative will also focus on enabling commercialisation by addressing common barriers such as funding, IP management, and validation requirements.
- Through this approach, SGR Technology Network aims to build a stronger innovation ecosystem and accelerate the adoption of locally driven solutions.



STRATEGIC WINS

The programme is targeted to strengthen Sarawak's innovation ecosystem by driving early-stage R&D collaboration, proof-of-concept testing, and technology validation. It aims to accelerate the development and adoption of fit-for-purpose technologies while positioning Sarawak as a competitive contributor to national technology advancement in the energy sector.

SGR CATALYST PROGRAMME

KEY OBJECTIVES

Technology Commercialisation
Support SGR ecosystem players in developing viable technologies and preparing them for commercialisation.

Innovation Deployment
Accelerate the transition of proven technologies from pilot and demonstration stages into market-ready solutions supporting energy transition and low-carbon objectives.

STRATEGIC RATIONALE

SGR ecosystem players possess significant potential to deliver localised innovation, yet many face difficulties in accessing funding and commercialising their technologies due to limited technical support and high levels of risk exposure. As Malaysia transitions toward a greener and more sustainable energy model, demand is growing for digitalised, low-carbon, and modular solutions.

Building on technologies developed and validated through SGR Technology Network, this programme focuses on late-stage development, pilot implementation, and commercial scaling. This initiative complements national efforts such as the OGSE Catalyst Programme led by MPRC, while tailoring support mechanisms to Sarawak's vendor maturity, energy agenda, and institutional ecosystem. By strengthening the innovation-to-commercialisation pipeline, Sarawak can generate competitive homegrown solutions and drive regional leadership in the energy and industrial services sector transformation.

HIGH-LEVEL APPROACH

The programme will:
- Identify and support promising technologies emerging from SGR Technology Network and other R&D initiatives for pilot testing and market deployment.
- Provide targeted grants, advisory, and commercialisation support through SGR Industry Portal.

STRATEGIC WINS

This programme is expected to increase the number of locally developed energy and industrial technologies reaching commercial scale, create new IP assets, and enable local firms to enter higher-value market segments. It will also strengthen Sarawak's profile as an emerging hub for innovation, talent, and applied research.

Capability

SARAWAK TALENT DEVELOPMENT FRAMEWORK AND INFORMATION SYSTEM

KEY OBJECTIVES

Workforce Governance
Establish a statewide policy framework and digital platform to coordinate SGR workforce planning, certification, and development.

Talent-Industry Alignment
Ensure alignment between training supply and industry demand to meet Sarawak's long-term energy and industrial goals.

STRATEGIC RATIONALE

Sarawak's energy and industrial sector is expanding across upstream, downstream, and energy transition activities. However, workforce planning remains fragmented with limited coordination across agencies, training providers, and industry stakeholders.

A centralised talent development framework and digital information system will streamline efforts, improve visibility into workforce demand and relevant skill gaps, and ensure alignment between talent supply and industry demand.

This initiative will also support clearer workforce planning and policy direction, enabling better planning by employers, educators, and investors.

HIGH-LEVEL APPROACH

- Stakeholders across the public and private sectors will define key workforce priorities aligned with Sarawak's industrial strategies and energy roadmap.
- A unified digital platform will be developed to centralise workforce data, certification status, and industry demand trends.
- Industry players and relevant authorities will be consulted to shape the Sarawak Talent Development Framework and Policy, incorporating governance and regulatory mechanisms.
- The policy and platform will be launched for public use, with systems in place for institutional governance, data management, and continuous updates.

STRATEGIC WINS

This programme is designed to establish a long-term view of talent demand and workforce projections, guiding workforce strategy and enabling alignment across the SGR ecosystem.

FOCUS ON STRATEGIC CATEGORIES

The prioritisation of categories aligns with expected project demand across upstream, downstream, gas, hydrogen, and CCUS and directly supports the flagship programmes in the previous section. These programmes address capability gaps across the energy and industrial service categories most impacted by SGR.

- Drilling and Well Services
- Engineering, Construction and Projects (ECP)
- Operations and Maintenance (O&M)
- Logistics
- Equipment Manufacturing

DRILLING AND WELL SERVICES

Drilling and Well Services comprise the upstream technical activities that enable exploration, production, and maintenance of oil, gas, and CCUS wells. This includes drilling operations, well construction, well stimulation, wireline, cementing, and plug-and-abandonment (P&A) services.

In Sarawak, well services represent a high-value, technology-intensive segment largely supported by national and international service providers. Local services companies currently participate in selected scopes such as manpower supply, logistics, and minor servicing. The next step is to build local capacity in drilling and well services to support Sarawak onshore and offshore fields as well as CCUS developments.



KEY OBJECTIVES

- Develop Sarawak-Based Capability in drilling, well construction, and intervention services to support upstream and CCUS projects.
- Increase Sarawakian vendor participation in high-value scopes (e.g. cementing, stimulation, wireline, slickline, and P&A).
- Enable technology transfer and localisation through partnerships with global energy and industrial service providers.
- Build a certified workforce in critical well service skills, including high-pressure operations and well integrity management.

STRATEGIC RATIONALE

Sarawak's upstream portfolio, particularly fields with elevated carbon dioxide (CO_2) content and mature assets, continues to require extensive drilling and well servicing activities to sustain production and manage field life cycles. The emergence of CCUS injection wells and upcoming decommissioning campaigns will further increase demand for specialised expertise in well integrity, intervention, and abandonment.

Establishing a Sarawak-based drilling and well services ecosystem will increase local participation and value creation from upstream operations while reducing reliance on foreign contractors and improving overall operational agility. It will also create new technical career pathways for Sarawakian engineers and technicians, developing a skilled workforce capable of supporting both conventional and low-carbon well operations such as CO_2 injection and subsurface monitoring.

By aligning with international safety and operational standards, Sarawak can position itself as a regional hub for advanced well services that underpins Malaysia's energy transition and strengthens its long-term industrial sustainability and competitiveness.



HIGH-LEVEL APPROACH

The SGR Ecosystem Blueprint's flagship programmes present Drilling and Well Services companies with a structured opportunity to grow their technical capacity and secure a meaningful role in Sarawak's expanding upstream activity.

- The **SGR Enterprise Excellence Programme** identifies and supports local firms with potential to scale into well services through targeted capability assessments, certification pathways, and operational readiness initiatives.
- The **SGR Strategic Partnerships Programme** facilitates JVs and licensing agreements between Sarawak-based companies and established service providers, enabling access to advanced tools, technology, and technical training.
- The **SGR Industrial Capability Programme** prioritises workforce development and technical upskilling in well integrity, pressure control, and intervention operations to establish a strong pipeline of certified Sarawakian talents capable of supporting future onshore, offshore, and CCUS well projects.

ENGINEERING, CONSTRUCTION AND PROJECTS (ECP)

ECP encompasses end-to-end delivery of Engineering, Procurement, Construction, Installation and Commissioning (EPCIC) works, including Front End Engineering Design (FEED) and Project Management Consulting (PMC) scopes.

KEY OBJECTIVES

Build the capabilities of ECP companies to enable them to participate as Tier-1 contractors in full-scope engineering, procurement, construction, installation and commissioning (EPCIC) projects.

Strengthen local participation in FEED, PMC, and integrated project delivery for gas, hydrogen, CCUS, and low-carbon power infrastructure.

STRATEGIC RATIONALE

As SGR-related projects scale up, local firms risk remaining limited to manpower supply and lower-value subcontracting activities. Without targeted development, few will qualify for FEED or PMC tenders, reducing local economic participation. Building end-to-end capability will reduce value leakage and enable Sarawak to anchor full project delivery from within the State.



HIGH-LEVEL APPROACH

The SGR Ecosystem Blueprint's flagship programmes offer growing EPC companies a structured platform to expand their capabilities and market presence.

ACTIVITY HORIZON

SGR Activity Horizon will provide early visibility into upcoming projects and investment opportunities, allowing firms to plan resources, investments, and bidding strategies in advance.

ENTERPRISE EXCELLENCE

Under the SGR Enterprise Excellence Programme, a dedicated PMC and EPCIC development track will be launched targeting high-potential vendors. This will provide structured support in meeting technical, HSE, and commercial readiness for Tier-1 roles. Training and certification pathways will prioritise FEED, project controls, commissioning, and brownfield modification capabilities.

STRATEGIC PARTNERSHIPS

Under the SGR Strategic Partnerships initiative, selected firms will be matched with regional or international ECP leaders to support capability transfer and joint delivery of complex scopes. This includes co-developing proposals for upcoming CCUS and infrastructure projects.

FABRICATION YARD

The upcoming Fabrication Yard will serve as a central base for modular assembly and project execution, supporting integrated delivery of SGR-aligned gas processing units, and offshore structures.

FINANCING

To support participation in large-scale tenders that require higher working capital, vendors will be directed to Financing Facilitation Programme to access performance bonds, bridging capital, and project financing advisory, with priority for firms involved in pre-qualification or partnership pipelines.

OPERATIONS AND MAINTENANCE

Vendors in this category typically provide plant foundations, tank bases, building structures, and brownfield maintenance.

KEY OBJECTIVES

Equip Sarawakian companies with the capability to build and upgrade industrial facilities, including modular plants, upgrades to existing sites, and infrastructure that can support clean energy.

Expand local participation in maintenance and turnaround contracts by aligning capabilities with industry needs.

STRATEGIC RATIONALE

With brownfield upgrades, ammonia-ready tank farms, and structural retrofits becoming more common, future civil scopes will require knowledge of offshore-rated materials, pre-cast systems, and confined site work. Many civil contractors are experienced in general construction but are unfamiliar with SGR-specific work scopes or modular execution methods.



HIGH-LEVEL APPROACH

The SGR Ecosystem Blueprint's flagship programmes provide O&M companies with a structured pathway to build operational readiness across SGR-specific civil, structural, and maintenance scopes.

- The **SGR Strategic Partnerships Programme** connects capable industry partners to jointly bid for work packages.
- Pilot contract opportunities are enabled through collaboration with asset owners involved in SGR Phase 1 developments and ongoing brownfield upgrades, providing qualified vendors with site-based experience.
- The **Supply Base and Fabrication Yard Development Programmes** promote vendor clustering around key logistics and fabrication hubs, enabling civil and structural contractors to establish operations near supply bases, access long-term turnaround contracts, strengthen capabilities, and improve overall efficiency.
- The **Financing Facilitation Programme** provides a platform to facilitate capital support, enabling contractors to scale equipment and project delivery capabilities while entering higher-value scopes.



LOGISTICS

This category includes vendors providing offshore logistics, vessel maintenance, retrofitting, and marine instrumentation.

KEY OBJECTIVES

Strengthen Sarawak's capacity to support offshore logistics, marine retrofitting, and low-carbon vessel services.

Position Sarawak as a hub for marine lifecycle services and upstream mobilisation.



STRATEGIC RATIONALE

Offshore and low-carbon projects require specialised services such as vessel retrofitting, green fuel handling, and marine instrumentation which are areas where local vendors currently have limited participation. Strengthening Sarawak's marine service offering will help capture emerging demands.

HIGH-LEVEL APPROACH

The SGR Ecosystem Blueprint's flagship programmes offer logistics companies a structured platform to develop a fit-for-purpose logistics services along the SGR corridor.

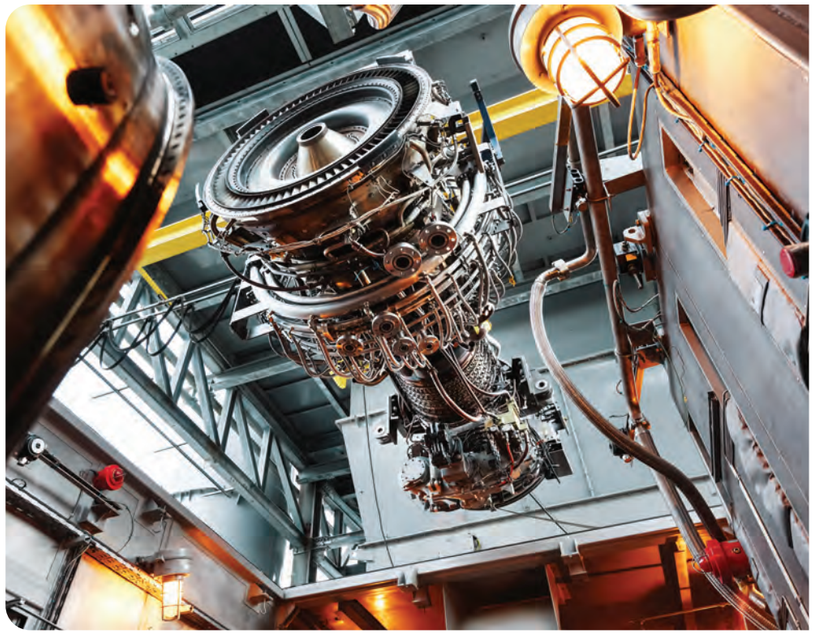
Strengthening Sarawak's marine services capabilities will enable Sarawak to meet emerging demands.

- **Supply Base Development Programme** is targeted to provide the staging ground for upstream logistics in Sarawak.
- Through **SGR Industrial Capability Programme**, specialised training is proposed to cover marine HSE compliance, fuel systems, and instrumentation for low-carbon maritime operations.
- **SGR Strategic Partnerships Programme** aims to support Sarawak-based logistics firms in forming alliances with key marine service players, unlocking access to new scopes and technology transfers.

EQUIPMENT MANUFACTURING

This category covers the design, fabrication, assembly, and testing of mechanical and electrical equipment and components that serve the industries under SGR.

Sarawak already has a capable engineering base supporting downstream and industrial projects. Building on this foundation, the next phase is to expand into high-value and high-skill manufacturing that cultivates advanced capabilities such as mechatronics and automation. This strengthens the resilience of supply chain for SGR, while positioning Sarawak as a regional hub for energy equipment production and maintenance.



KEY OBJECTIVES

- Localise production of critical process equipment, such as pressure systems, rotating assemblies, valves, and control panels. These are used across gas and CCUS projects.
- Develop testing and certification infrastructure in accordance with global standards to raise product quality and export readiness.
- Facilitate technology transfer and partnerships between local firms and global Original Equipment Manufacturers (OEMs) to accelerate capability-building.
- Strengthen workforce competencies in advanced manufacturing, industrial automation and related scopes.
- Promote Sarawak-made equipment as part of regional supply chains, expanding market access within ASEAN and Asia-Pacific.

STRATEGIC RATIONALE

Manufacturing is a key enabler of Sarawak's long-term industrial resilience and value creation. At the State level, manufacturing has been identified as a priority sector, positioning it as a source of higher-value, technology-driven growth. This ambition is already gaining traction, with growing investment and job creation across sub-sectors such as basic metal, non-metallic mineral products, and chemicals, reinforcing investor confidence in Sarawak's industrial potential.

Building on this momentum, strengthening equipment manufacturing sector supports Sarawak's transition into high-value and high-complexity production, focusing on components that directly serve projects under SGR, and CCUS developments. By strengthening local capability in precision fabrication, certification, and modular assembly, this programme enhances local content while cultivating advanced technical skills among Sarawakians.

HIGH-LEVEL APPROACH

The SGR Ecosystem Blueprint's flagship programmes offer equipment manufacturers a structured platform to develop capabilities across the design, fabrication, assembly, and testing of mechanical and electrical components serving SGR industries.

- Under **SGR Strategic Partnerships Programme**, facilitate JVs and technology-transfer arrangements between local manufacturers and global OEMs to enable production of certified valves, modular skids, and electrical control systems.
- Through **SGR Enterprise Excellence Programme**, develop vendor readiness and certification pathways aligned with ASME, API, and IECEx standards.
- Leverage **Financing Facilitation Programme** to provide access to capital for tooling, automation, and certification investments.
- Under **SGR Industrial Capability Programme**, deliver targeted training to build Sarawak's next generation of advanced manufacturing talent.



04 GOVERNANCE FOR THE BLUEPRINT

The SGR Ecosystem Blueprint will be delivered through a collaborative partnership between PETROS, Sarawak Government and industry stakeholders. Each initiative will be led by designated programme owners, supported by cross-agency working teams and industry representatives to ensure coordinated and outcome-driven delivery.

GUIDING PRINCIPLES FOR IMPLEMENTATION GOVERNANCE

Implementation of the Blueprint will follow four key principles:

1

CLEAR ACCOUNTABILITY

Each programme to have a designated owner responsible for implementation, with roles outlined in the Blueprint Action Plan.

2

MILESTONE-DRIVEN DELIVERY

Programme progress is to be managed against key milestones and timelines, ensuring implementation remains on schedule and aligned with strategic goals.

3

STRUCTURED KPI REPORTING

Each programme to have agreed Key Performance Indicators (KPIs) tracked through regular reporting. These inform performance reviews and support timely corrective actions where required.

4

ESCALATION AND OVERSIGHT

Programme leads to report to a Steering Committee, which provides direction and resolves implementation challenges. Escalation mechanisms and decision pathways enable challenges to be addressed as and when required.

PETROS AS LEAD COORDINATOR FOR SGR ECOSYSTEM DEVELOPMENT IN SARAWAK

PETROS shall serve as the primary coordinator for the implementation of the SGR Ecosystem Blueprint, with operational responsibility to ensure implementation progress and stakeholder alignment. Its responsibilities include:

- Consolidating performance-level reporting for review by the Steering Committee
- Monitoring coordination and dependencies across programmes and supporting timely resolution of challenges.
- Coordinating stakeholder engagement with State agencies, industry players, financial and training institutions.
- Ensuring implementation remains aligned with Sarawak's broader energy and industrial policies.

To ensure agility, regular coordination meetings (e.g. working groups or regular coordination meetings cadence sessions) will be maintained, with escalation routes to the Steering Committee if cross-programme or strategic issues arise.

PROGRAMME LEAD AND IMPLEMENTATION PARTNERS

Each programme will be led by a designated Programme Lead accountable for:

- Executing deliverables and meeting milestones.
- Tracking and reporting progress according to the action plan.
- Engaging technical or inter-agency working groups as required.

Implementation partners, including relevant government agencies, training providers, financial institutions, certifying bodies, and industry associations will be engaged based on programme requirements.



GLOSSARY

API	***American Petroleum Institute*** – Organisation that develops standards and best practices for the oil and gas industry.
ASME	***American Society of Mechanical Engineers*** – International standards body for mechanical engineering and industrial equipment.
CCGT	***Combined Cycle Gas Turbine*** – A power plant that recovers exhaust heat from gas turbines to generate extra steam power, improving efficiency.
CCUS	***Carbon Capture, Utilisation and Storage*** – Technology to capture CO_2 from industrial and energy facilities, reuse it in processes, or store it in geological formations. PETROS is the resource manager for Sarawak's storage sites.
ECP	***Engineering, Construction and Projects*** – A strategic impact category covering end-to-end project delivery, including FEED and PMC scopes.
EPCIC	***Engineering, Procurement, Construction, Installation, and Commissioning*** – A turnkey contracting model covering the full delivery of oil and gas facilities.
FEED	***Front End Engineering Design*** – The early engineering stage that defines project scope, design basis and cost before detailed design and construction.
FSRU	***Floating Storage and Regasification Unit*** – A vessel that stores LNG and converts it back to gas for supply to pipelines or power plants.
GLC	***Government-Linked Company*** – A company in which the government holds a controlling stake, directly or through its agencies.
Hydrogen Economy Roadmap	Sarawak's strategic plan to become a hydrogen hub by 2035, including production facilities, export infrastructure, and downstream applications.
ICT	***Information and Communications Technology*** – Systems for data, connectivity, and digital services that enable efficiency and integration in SGR projects.
IECEx	***IEC System for Certification to Standards Relating to Equipment for Use in Explosive Atmospheres*** – International certification system for equipment and personnel operating in explosive atmospheres.
i-OGSE	***Integrated OGSE Portal*** – A digital one-stop platform for vendor registration, certification, financing access, and project tracking.
IP	***Intellectual Property*** – Legally protected creations such as patents, designs, software and proprietary know-how.
JCC	***Joint Consultative Committee*** – A consultative forum that is developing the Sarawak-specific company certification.
JIP	***Joint Industry Project*** – A collaborative R&D initiative where companies, universities, and developers share costs and expertise to develop new technologies.
KPI	***Key Performance Indicator*** – An agreed measure used to track programme progress against targets.

MEITD	***Ministry of Education, Innovation and Talent Development Sarawak*** – Sarawak State ministry responsible for shaping policies and initiatives that support workforce capability, research, and economic transformation.
MPRC	***Malaysia Petroleum Resources Corporation*** – Federal agency under the Ministry of Economy responsible for national OGSE development, policy, and vendor upgrading.
O&M	***Operations and Maintenance*** – A strategic impact category covering the services that keep facilities running, including maintenance and turnaround work.
OGSE	***Oil and Gas Services and Equipment*** – Companies providing services and equipment across the upstream, midstream, and downstream oil and gas value chain.
PETROS	***Petroleum Sarawak Berhad*** – Sarawak's State-owned energy company overseeing upstream oil and gas, new energy, and coordination of the SGR ecosystem.
PMC	***Project Management Consultancy*** – Specialist role providing oversight and assurance in the engineering and construction of major projects.
QA	***Quality Assurance*** – Processes to ensure products and services meet required technical and safety standards.
QC	***Quality Control*** – Inspection and testing activities to ensure products meet quality standards.
R&D	***Research and Development*** – Activities to discover, develop and test new technologies, products or processes.
SET-P	***Sarawak Energy Transition Policy*** – State policy to achieve energy security, decarbonisation, and inclusive development by 2030.
SGR	***Sarawak Gas Roadmap*** – The State's long-term plan to unlock Sarawak's gas potential through four strategic hubs (Kuching, Bintulu, Samalaju and Miri).
SME	***Small and Medium Enterprise*** – A smaller company; most SGR ecosystem players are SMEs operating as subcontractors.
SSLNG	***Small-Scale Liquefied Natural Gas*** – Compact liquefaction and break-bulking facilities that supply LNG to locations beyond the pipeline network.
STEM	***Science, Technology, Engineering, and Mathematics*** – Core disciplines underpinning technical skills for SGR projects.
TalentCorp	***Talent Corporation Malaysia Berhad*** – The national agency that supports talent development and mobility, including attracting returning Malaysian professionals.
TVET	***Technical and Vocational Education and Training*** – Practical, skills-based training for trades such as welding, instrumentation, and mechanical fitting.
VPS	***Virtual Pipeline System*** – The delivery of gas, typically LNG, by truck, vessel or container to locations without a fixed pipeline.

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