

Chapter 12

BRUNEI TOURISM AT A STANDSTILL

*Azman Ahmad**

Universiti Brunei Darussalam, Brunei

ABSTRACT

As a small nation, Brunei Darussalam has committed to developing tourism in order to detach itself from being too reliant on oil and gas, which has fuelled its economy since the late 1920s. The country produced the first tourism master plan, while restructuring the tourism authority in 1996, which highlighted the gravity to develop the tourism sector, as well as the potential of its tourism industry in the Southeast Asian region. Nearly two decades later, tourism's contribution to the country's gross domestic product (GDP), employment and investment is still unconvincing, although figures show that they are increasing. Neighbouring developing countries such as Cambodia, Laos and Vietnam have recorded greater percentage contribution to their respective GDPs than Brunei Darussalam's. A new five-year tourism master plan was implemented in 2012 that outlines nature and culture and Islamic tourism as the key areas to be developed. In spite of this, there still exists scepticism about Brunei Darussalam's tourism development. Therefore, this chapter aims to uncover the reasons for tourism's weak contribution and slow growth in Brunei Darussalam, and identify the challenges faced by the country in developing its tourism industry.

INTRODUCTION

Brunei Darussalam is more known as an oil-wealthy nation than as a tourist destination. Since 1929, when oil was first discovered in this tiny kingdom on the north-western coast of the island of Borneo, it has prospered to the extent that its economy has been dominated by the oil and gas sector until now. The government of Brunei Darussalam has identified the potential of tourism as early as the 1990s, which was evident in official documents such as the country's national development plans (GBD, 1993; GBD, 2007; GBD, n.d. a; GBD, n.d. b). During the same time, the government also re-organised the administration of tourism

* azman.ahmad@ubd.edu.bn

development by appointing a new head for tourism, and upgrading it from a unit to a division. The first tourism master plan was also produced in the mid-1990s which essentially recognised the strengths as well as the weaknesses of developing tourism in the country (KPMG, 1998).

The year 2001 was designated as the ‘Visit Brunei Year’ with the aim to boost the growth of the tourism industry locally and to promote the country internationally as a tourist destination (Anaman & Looi, 2000). The Monitor Report of 2003 also acknowledged the prospect of tourism in Brunei Darussalam, as it identified that “four clusters in the economy with the greatest potential to attract FDI were business services, financial services, hospitality and tourism, and transportation and logistics” (Crosby, 2007:10). The Brunei Tourism Board was established in 2005, represented by government agencies and the tourism industry, to coordinate activities and development of tourism products and services (Ahmad, 2014). Brunei Darussalam joined the World Tourism Organisation (UNWTO) in November 2007, with the intention to increase the international profile of the country as a tourism destination (Brunei Tourism, 2007). A new tourism master plan was recently produced for the period 2011 to 2015, which detailed out the implementation of 69 tourism projects to be carried out in stages (Hab, 2011; Oxford Business Group, 2013).

All these initiatives are indicative of the government’s strong desire in developing tourism as an industry that can contribute towards diversifying the country’s economy. Given Brunei Darussalam’s strategic position in Southeast Asia, surrounded by countries that are well-established as tourism destinations, one would anticipate that the country would leverage on this advantage. However, as can be seen in the following section, Brunei Darussalam appears to be left far behind in its tourism development and contribution, even by neighbouring countries such as Cambodia, Laos and Myanmar, who are politically less stable than Brunei Darussalam. It is the purpose of this chapter to seek an understanding of the primary reasons for the slow growth and weak contribution of tourism to the country’s economic progress.

TOURISM STANDING

The number of tourist arrivals into Brunei Darussalam has been fluctuating over the past few years. As reflected in Figure 1, there is a regular and stable increase from 2004 to 2008, but since then, tourist arrivals have been unsteady. The country’s international tourism reflected through the number of foreign tourist arrivals had a positive growth of 89% in the past years from 2004 to 2013. The highest tourist arrival was in 2011 with 242,000 tourists, and over the last 10 years, from 2004 to 2013, international tourist arrivals averaged at 185,513 annually. There was a sudden decline in tourist arrival in 2009 with 157,000 tourists, which could have been due to the global financial crisis. The figure rose for the following two years, but dropped again in 2012. This fall could be attributed to the suspension of long-haul flights by the national carrier, Royal Brunei Airlines, in 2011 for services to Auckland, Brisbane, Perth, Ho Chi Minh City and Kuching (Too, 2011). Travelers from Australia and New Zealand have been patronising Royal Brunei Airlines and transiting in Brunei Darussalam before reaching their final destination, London, and vice-versa. The flight cuts will certainly bear an adverse impact on inbound tourists to Brunei Darussalam.

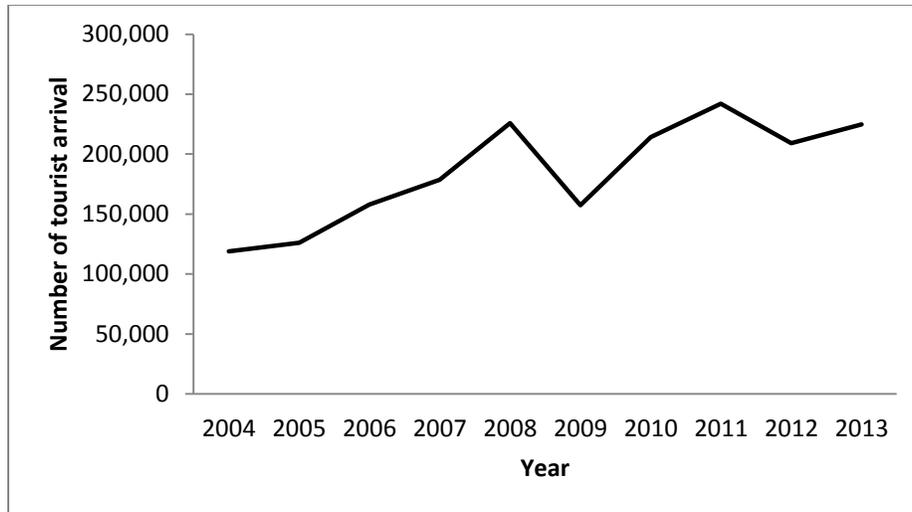


Figure 1. Tourist Arrivals in Brunei Darussalam 2004-2013.

Source: Tourism Development Department (2014).

Brunei Darussalam's tourism industry is believed to directly account for only 1.5% to the country's gross domestic product in 2013, which amounts to BND 325.1 million (WTTC, 2014) (1 BND = 0.79 USD in September 2014). This figure is expected to increase by 5.1% in 2014, and by 4.8% annually for the next ten years from 2014 (WTTC, 2014). It is apparent that the contribution of tourism to Brunei Darussalam's GDP is not substantial, and Figure 2 further demonstrates this trend which has been sturdy but not impressive, for the period 2004 to 2014. Generally, it shows a decrease in the tourism's direct contribution to Brunei Darussalam's GDP over the period, and has plateaued in the past couple of years. This begs one to ask whether the efforts carried out by the government in promoting tourism thus far have been effective or otherwise.

As a new player to tourism, Brunei Darussalam has netted a small portion of the global tourism market. The World Economic Forum has recognised the tourism potential of the country, ranking it at 72 out of 140 countries on the 2013 Travel and Tourism Competitiveness Index (World Economic Forum, 2013). However, in terms of prioritisation of travel and tourism, Brunei Darussalam was ranked 123 of 140 whereby the World Economic Forum indicates that the country has yet to put emphasis on the sector. In comparison with other countries in the Southeast Asian region, the figure for tourist arrivals in Brunei Darussalam is very low, and in fact, it is the lowest in ASEAN (refer to Figure 3). According to the Official Website of the Association of South East Asian Nations (ASEAN, 2014), Brunei Darussalam received the smallest number of tourist arrivals in the year 2012 with only 0.23% of total tourist arrivals in ASEAN, covering Cambodia (4.02%), Indonesia (9.02%), Laos (3.73%), Malaysia (28.06%), Myanmar (1.19%), Philippines (4.79%), Singapore (16.24%), Thailand (25.05%) and Vietnam (7.67%). Myanmar's tourism direct contribution to its GDP stood at 1.5% in 2013, which is similar to Brunei Darussalam, but other neighbouring countries such as Laos (4.6%), Cambodia (10.4%) and Vietnam (4.5%), received greater percentages to their respective GDPs from tourism (WTTC, 2014). It can be deduced from these figures that tourism may have contributed to the economy of Brunei

Darussalam, but in comparison with other countries in the Southeast Asia, it is still lagging behind the rest in the region.

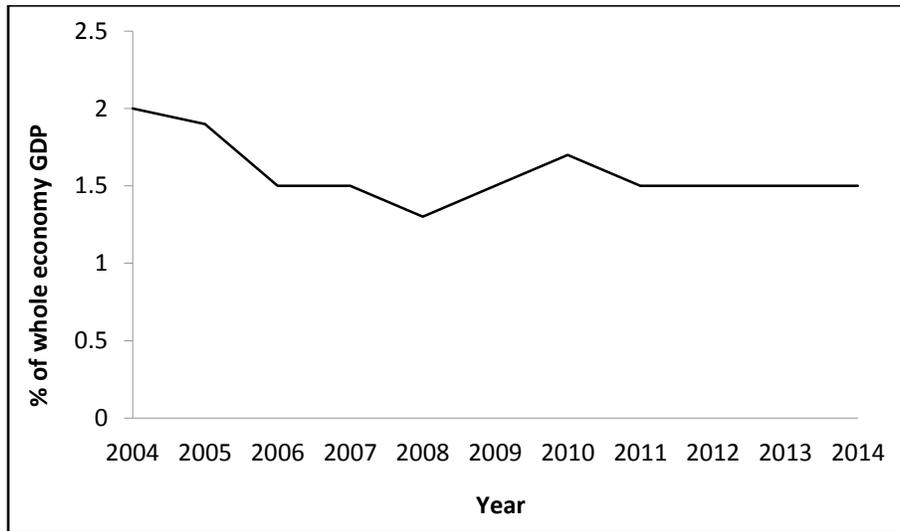


Figure 2. Tourism's Direct Contribution to GDP.

Source: WTTC (2014).

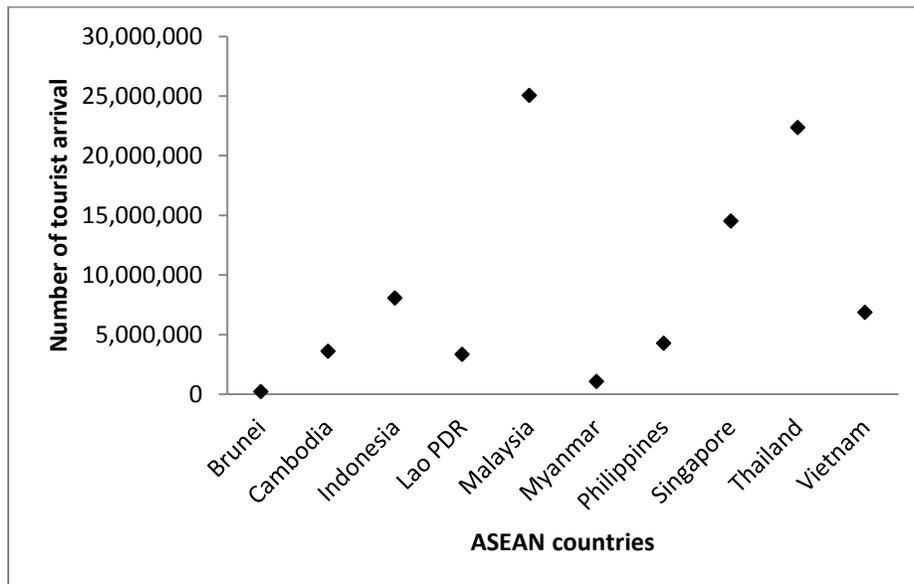


Figure 3. Tourist Arrivals in ASEAN in 2012.

Source: ASEAN (2014).

In relation to employment, WTTC (2014) claimed that tourism supported 5,000 jobs in Brunei Darussalam, which is equivalent to 2.4% of total employment. Crosby (2007) argued that hospitality and tourism employed approximately 3.5% of the private workforce, and half

of those employed are foreign workers. Even though tourism development generates employment in the country, it is worrisome to note that partially they consist of expatriates when there are over 5,000 Bruneians who are unemployed (Bandial, 2011).

Despite the fact that the country has developed the support facilities and services necessary for tourism, such as airport facilities, visitor attractions, telecommunication services, banking facilities and accommodation (Ahmad, 2014), the pace of tourism development has been rather slow, or one should say, at a standstill. There appears to be a lack of progression from where it began to what it has contributed now. In Ahmad's (2014) study in comparison to a similar survey conducted in the 1990s, he found that there has been no significant improvement on certain tourism facilities, namely ground transport, entertainment and handicrafts and souvenirs.

In general, there is a strong desire to support and develop tourism in Brunei Darussalam. The government has pushed numerous initiatives to spur tourism growth. The performance of the tourism sector has been encouraging, but not impressive to convince the country's leaders that tourism will be one of major drivers of its economy. Ku writes that the "prospects of the tourist industry remain uncertain" (2009 p. 262).

IMPEDIMENTS TO TOURISM GROWTH

The government acknowledges the constraints faced by the country's tourism sector. The country's Long-Term Development Plan identifies limited human resource, insufficient skills, inadequate places of interest and limited dissemination of tourist information as major obstacles to developing tourism in Brunei Darussalam (GBD, 2007). Crosby (2007) further adds other barriers to tourism growth in the country including an underfunded tourism unit, policy constraints regarding land ownership, visa requirements and inadequate infrastructure. The Asia-Pacific Economic Cooperation (APEC) Tourism Working Group report also echoed infrastructure and human resource deficiencies as main impediments to tourism progress in Brunei Darussalam (Anon., 2013).

Inadequate Tourism Infrastructure

Tourist arrival was adversely affected in 2011 when the national carrier, Royal Brunei Airlines cut flights to Australia and New Zealand to concentrate on four primary long-haul (Melbourne, Dubai, London and Jeddah) and nine short-haul destinations (Bangkok, Hong Kong, Kota Kinabalu, Jakarta, Kuala Lumpur, Manila, Singapore, Shanghai and Surabaya) (Oxford Business Group, 2013). In spite of the country's strategic location in Southeast Asia, foreign airlines are not attracted to set up routes to Brunei Darussalam as there are better airport facilities nearby, such as Singapore Changi Airport and Kuala Lumpur International Airport. The limited aviation connectivity could also be avoided with improved policies on landing rights (Anon., 2013). Accordingly, the government of Brunei Darussalam is undertaking a modernisation and expansion project of its airport which is expected to be completed by the end of 2014. This will double the airport's handling capacity to 3 million passengers annually, aside from developing itself as a competitive air logistics hub in the

region, improving airport connectivity, and increasing flight frequencies and passenger traffic. This will directly contribute to the prospective growth of the travel and tourism sector in the country.

In addition, there has been a rise in cruise ship tourism in the region (Oxford Business Group, 2013; WTTC, 2006), and Brunei Darussalam has become a stopover point. Hence, the cruise market clearly offers good growth potential. Brunei Darussalam, however, has limited capacity to accommodate this segment where cruise ship facilities are lacking as the country's port was designed primarily for industry activities. Enhancement of existing port facilities as well as new facilities and services at the surrounding towns is therefore needed to cater for the rising trend of cruise ship tourism.

Aside from aviation and maritime connectivity and facilities, another key infrastructural weakness is public transport (Crosby, 2007). Tourists are obliged to take local tour packages because of the difficulty in travelling around Brunei Darussalam using public transport. Taxis are rarely to be found and their fares can be excessive, whilst buses are irregular and unpredictable (Jong, 2011). The government has recently reviewed the country's transportation system, and will come up with a land transport master plan. The Minister of Communications revealed that public bus transportation is considered as the first choice of alternative transportation, and that they will be implementing steps towards providing better public bus transportation under the new master plan (Kon, 2014). The realisation of this plan may be uncertain since Brunei Darussalam has one of the world's highest car ownership rates with 2.65 people per vehicle (Masli, 2013), which may put people off from using public transport.

Lack of Skilled Workforce in Hospitality and Tourism

With 5,000 Bruneians who are reportedly unemployed (Bandial, 2011), it is difficult to accept that the country is lacking in human resources, or that it has limited human resources. In a study among job seekers in the country, Cheong and Lawrey (2009) found that there was a very high mismatch of job expectations and actual requirements in the job market. During the first career fair organised by the Department of Economic Planning and Development, where over 1,500 job opportunities in the retail, hospitality and tourism sector were offered, the Minister of Home Affairs highlighted that skills-job mismatch was the major reason for locals failing to secure employment (Shahminan, 2013). As a result, a significant proportion of jobs in the tourism industry continue to be occupied by foreign workers. Over 2,400 job vacancies in retail, hospitality and tourism, banking and finance, construction, automotive and logistics were offered in the career fairs in 2013, but only 18% of the openings were filled (Yacob, 2014). This further indicates that there is a significant mismatch between skills and desired employment in Brunei Darussalam's tourism industry.

The existing vocational and technical education in Brunei Darussalam seems to lack focus on skills development and alignment with the national manpower needs. Suitable trainings that are relevant to the needs of the industry are therefore essential to ensure that the country's workforce possess the skills in hospitality and tourism. Both the educational institutions and the tourism industries are required to collaborate and work closely to align courses and trainings with the evolving tourism products and technologies. This will gradually reduce the need for foreign workers in the sectors, and therefore, providing job

opportunities for the locals. Brunei Darussalam is in the process of reforming its technical and vocational education, with greater engagement of industries, which will see transformational changes in the infrastructure and curriculum over the next five years (Souyono, 2014). Such transformation is expected to enable its youth to gain employment with the right skills set.

Insufficient Attractions for Tourists

Although it is recognised as a peaceful and stable country, Brunei Darussalam is still trailing behind its neighbouring countries in terms of travel and tourism. The government also acknowledges that the country is not to compete with established tourism destinations in the region, rather, it serves to complement and add value to existing tourism products (KPMG, 1998). As such, it has been concentrating in niche tourism areas including nature (e.g., rainforest), culture and heritage (e.g., mosques, royal palaces, water village or '*Kampong Ayer*'). It was noted, however, that Brunei Darussalam has a limited scope of available attractions (Too, 2012), hence foreign tourism firms have little interest to explore and promote the country as a tourist destination (Oxford Business Group, 2013).

Brunei Darussalam will need to expand the existing market as well as to provide more attractions for tourists. Increased diversification of tourism products will help to stimulate new opportunities for the growth of the country's travel and tourism. Besides excursions to the rainforest for trekking for instance, nature-based ecotourism could be expanded to include nature-based sporting activities such as water rafting and cruising.

The Brunei Tourism Board has been participating in more trade shows and roadshows outside the country to promote Brunei Darussalam (Yakub, 2010). However, Brunei faces very tough competition from its neighbouring countries such as Malaysia, Singapore and Indonesia, which are all vying to increase their tourism revenue. These neighbouring countries have been aggressively involved in marketing their attractions for decades and the tourism industry of these countries has well benefited from marketing efforts of foreign airlines as well as international hotel brands established in the respective countries (WTTC, 2006). Since there are only few foreign airlines operating airline services to Brunei Darussalam, its tourism industry failed to seize the full benefit of international marketing. One way to induce the growth of its tourism is to take the opportunity of the close link with neighbouring countries, particularly ASEAN countries, by facilitating and heightening air travel between member countries.

FUTURE DIRECTION

The first tourism master plan developed by KPMG (1998) recognised four special interest tourism products that are appropriate for the country, namely cultural and royalty tourism, ecotourism and adventure tourism, theme park tourism, and cruises. The master plan also identified several tourism products as unsuitable for Brunei Darussalam, and these include resort tourism, golf tourism, and conferences and exhibitions. In a survey among players in the tourism industry by Ahmad (2014), he found that tourism organisations shared similar views with the master plan. Contrary to the earlier master plan, Brunei Darussalam's tourism

authority is now promoting resort tourism, golf tourism, and conferences and exhibitions. The government calls for its tourism stakeholders to devise strategies for the development and promotion of golf tourism in the country, as it has several international-standard golf courses and playing golf is relatively cheaper compared to other countries in the region (Kasim, 2014). Similarly, the tourism authority also saw the potential as a Meetings, Incentives, Conventions and Exhibitions (MICE) destination, which could benefit the economy as the host country normally receives mass volumes of people coming in to attend large-scale MICE events, and therefore bringing in tourism income (Razak, 2007).

A more recent master plan for tourism was crafted for the period 2011 to 2015, which plans to target 400,000 international visitors in 2016 and increase the tourism sector's contribution to GDP (Hab, 2011; Oxford Business Group, 2013). During the country's Legislative Council session, the Minister of Industry and Primary Resources revealed that the new plan has identified 69 projects to raise the tourism industry in Brunei Darussalam, which included upgrading museums, building a sanctuary for proboscis monkeys, training tourist guides, increasing tourist facilities at a remote village, as well as the building of the second phase of the Kampung Ayer Cultural and Tourism Gallery (Fung, 2012). The tourism master plan will focus on two clusters, namely on natural assets and culture, and on heritage and Islamic tourism. These tourism products are still parallel to the earlier master plan, with an additional attention paid to Islamic tourism, which is a growing niche tourism in several Islamic countries in the world today.

The tourism industry, nonetheless, expressed its scepticism over the country's capacity to compete with established tourism destinations nearby, such as the Malaysian states of Sabah and Sarawak, each of which possesses notable world-renowned natural landmark in the form of Mount Kinabalu and the Mulu Caves (Shahminan, 2014). Similarly, they also raised the challenge in developing Islamic tourism in the country since Brunei Darussalam is surrounded by Muslim-majority countries such as Malaysia and Indonesia, which have performed well in attracting Muslim visitors. No matter what tourism products Brunei Darussalam aspires to develop and promote, it is highly likely that it will lose out to its contenders in the region who are more ready and more capable to gain tourism earnings from them.

The future growth of Brunei Darussalam's tourism is very much dependent on the commitment of the government as well as the private sectors to develop and make use of the full potential of the sector to foster economic growth and ultimately the well-being of its citizens. Brunei Darussalam has a number of unique attractions encompassing the niche areas of nature, culture and heritage. The country's tourism sector is vulnerable against long-standing tourism destinations in the region. In order to secure a sustainable growth of its tourism, more efforts and alignment need to be done by all stakeholders directly or indirectly contributing to the tourism industry. This requires a deeper understanding on the current situation and needs of the country's tourism sector, and what is required for it to grow.

CONCLUSION

Tourism has the potential to play an important role in the economy of Brunei Darussalam, as it has been identified as one of the mechanisms that can hasten the country's

economic diversification process, provide employment opportunities, increase revenue from foreign currency exchange, help enhance the image of the country and its international relations, and thus contributing towards a better quality of life for its population. The pace of tourism development in Brunei Darussalam has been rather sluggish, even though it has already established some of the support facilities and services necessary for tourism. The very insignificant contribution of tourism to Brunei Darussalam's economy indicates the small size of the tourism industry compared to the neighbouring countries, particularly the ASEAN member countries. Inadequate infrastructure, lack of skilled workforce for the tourism industry, and limited product offering are some of the main reasons for the stagnation of Brunei Darussalam's tourism. Tourism will not advance or become a critical contributor to the country's economy unless these hindrances are addressed. There is always a platform to enable improvements to be made which essentially require both the government and the private sectors to invest more capital in order to realise the full potential of the tourism sector in the country. Over the next few years, one will be able to assess whether current initiatives, including improvements to the tourism infrastructure, implementation of new tourism and transportation master plans, as well as vocational and technical education reforms, will eventually bring Brunei Darussalam's tourism out of obscurity.

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