

# Green Cities.....Green ASEAN

Paul Martins

Senior Trade and Investment Commissioner

Malaysia and Brunei

Head of the ASEAN Infrastructure Unit



Australian Government  
Australian Trade Commission



# ASEAN



**ASEAN represents a population of some 600 million and combined GDP of over A\$1.8 trillion (2010e)**

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# Executive Summary

- The green building sector is gaining momentum across ASEAN
- It has made some rapid gains in the last 24 months and is becoming more mainstream for governments and developers alike
  - The major ASEAN markets have had green rating tools in place for at least the last 12 months
- Highlights for us in our green building engagement over the past year have included:
  1. ASEAN wide webinar spread over 6 countries to some 100 people on green building initiatives and knowledge out of Australia
  2. Customer delegations/Ministry visits to Australia for best practice
  3. World Green Building Week (across ASEAN in Sep-10)
  4. World Green Building Conference in Singapore (Oct-10)
  5. High level engagement across all major GBC's across ASEAN
- Australia is well known, well regarded and active

# ASEAN GREEN BUILDING PROJECTS



- **Parkway Parade** (Non-Residential Existing Buildings)
- 2010 – awarded the Singapore Building and Construction Authority's **Green Mark Platinum** Award – existing building category
- First existing retail-office building to win the BCA Green Mark Platinum Award



## **EGAT Head Office Thailand**

- Award Winning Green Building
- The integration of the building and the surroundings with the concept of energy saving
- Pilot project using BIPV and Thermal Storage System, Air Conditioning & Ventilation System, Lighting System, Indoor Air Quality and Lift System

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# THE ASEAN MARKETS

# Singapore Update



- The most advanced and competitive construction (and green building) market in ASEAN
  - Outlook for 2011 of some S\$22-S\$28 billion in infrastructure projects
  - Iconic rather than just functional buildings
- Singapore was just recently ranked Asia's greenest city
- Very supportive government and BCA:
  - Have developed their own "Green Mark" criteria
  - Want to green 80% of building stock by 2030
  - Have set aside S\$100 million for the project
  - Focus also on enhanced productivity and ROI (training funds available)
  - Need some 18,000 trained professionals for the task

# Malaysia Update

- Dedicated Green Ministry and Minister!
  - Enacted in April 2009
  - Green Building Confederation and Green Building Index
- The market has already moved:
  - Has a large range of developers (who are active across ASEAN not just Malaysia)
  - New towers (office/residential) are being developed as green, but now the attention is turning to townships
  - PM has mandated that a number of key government offices must be retro-fitted green ASAP
- The Greater KL project aims to make KL one of the world's top 20 cities by 2020:
  - Major upgrades to MRT, Klang River, traffic congestion and improving quality of life to attract international MNCs

# Indonesia Update



- Indonesia is benefiting from very strong economic growth and recent economic/political stability
- It is attracting strong investment from around the world in a range of sectors but infrastructure needs to catch-up and is a major priority for the government
- Green building is an emerging sector but a country of 230 million people and with islands/needs spread over 3,000kms has varying needs:
  - Jakarta Building and Monitoring Agency plans to focus on some government buildings/projects in Jakarta
  - New towers/projects in Jakarta, and Surabaya with a green focus
  - High-end developments in major cities for residents
  - Major resort development in Bali and other islands

# Thailand Update

- The market has picked up in recent times and benefited from large stimulus funding from the government over the least 2+ years
- Green building is an emerging sector as a whole but when you cut the industry, there are many opportunities
  - High-end developments in major cities for residents
  - Major resorts throughout the country realise the need to be green to attract high worth European and North American travellers
- Thailand Green Building Institute and new Green rating tool “TREES” aim to increase FDI by 25% during 2010-2011
- Scarcity of available local professionals and issue
  - LEED is popular, currently there have been 13 LEED accredited projects in Thailand (as at October 2010)

# Philippines Update

- New government with major infrastructure requirements across the board (metro, airports, highways etc.)
- Green building is certainly new to the Philippines but according to a 2008 BCI Asia survey:
  - More Filipinos (62%) had worked on green development projects than Singapore or Malaysia
  - 47% rated their commitment to green buildings as high
  - 36% expected significant sales growth from their green building projects
  - The majority saw growth for green buildings in the education, hospitality, followed by residential and then commercial categories
  - Lack of awareness and lack of incentives were major hurdles
- Filipinos are very socially conscious
- Whilst it may not be the biggest market, it may be the least competitive and offer Australia a great opportunity to get involved

# Vietnam Update



- Rapid growth across all sectors as Vietnam continues to attract FDI from across the world, and is a major recipient of aid funding (WB, ADB, AusAID, JICA etc.) for its projects, this has created congestion and opportunities
- Major urban developments are being planned; major entertainment districts are being planned:
  - Binh Duong, Dong Nai, and new Hanoi City developments
  - Happy Land integrated township is US\$2 billion project
  - Development of Da Nang (China Beach) resorts to compete with Bali and Phuket internationally for tourists
  - Energy shortages projected from 2015 onwards, sustainable buildings and renewable energy have greater meaning in Vietnam
- Whilst the overall market is still developing, there are specific opportunities to chase

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# **MAJOR GREEN BUILDING OPPORTUNITY**

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## Australian Embassy Jakarta (followed by Bangkok)

- 40,000m<sup>2</sup> site and built-up area (A\$400m+ project)
- Working to achieve maximum green credentials
- Opportunity for it to become a signature project in Indonesia and across ASEAN
- Austrade is working with the Department of Foreign Affairs and Trade's Overseas Property Office on promoting the opportunity to supply products/services to the Australian green building industry
- We will then work with industry to showcase and promote their capability across ASEAN
- Currently at 90% design, tenders to be issued in Q2 2011

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# **THE AUSTRALIA VALUE-ADD ACROSS ASEAN**

# ASEAN Infrastructure Team



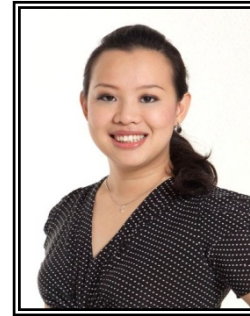
**Paul Martins**

ASEAN Infrastructure Team Leader  
Senior Trade & Investment  
Commissioner, Kuala Lumpur



**Diana Permana**

Business Development Manager  
Jakarta



**Euniece Quek**

Business Development Manager  
Kuala Lumpur



**Ancy Palma**

Business Development Manager  
Manila



**Tu Chung**

Business Development Manager  
Ho Chi Minh City



**Irene Tay**

Business Development Manager  
Singapore



**Acharaporn**

Business Development Manager  
Bangkok

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# Summary

- The ASEAN Infrastructure Team are active members of national GBCs across ASEAN
- We link in to local developers, national and state governments, and identify project opportunities
- We can help you navigate a crowded and competitive market place with local insights and networks
  - We can link you to various FTAs (AANZFTA, TAFTA, SAFTA)
- We coordinate a series of events, missions, workshops and dialogue between Australia and ASEAN industry
- We work closely with the GBCA to promote Australia's interests across ASEAN

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# Contact Us



[asean.infrastructure@austrade.gov.au](mailto:asean.infrastructure@austrade.gov.au)