CORRIDOR Intelligence

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Pax Silica series, piece 2

Pax Silica: Decided, Proposed, Unknown

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D **Documented.** From a public source listed in the sources.

P **Attributed.** Reported, or attributed to a named party.

I **Inference.** The author's reasoning.

KEY JUDGMENTS

- DECIDED A 1,619-hectare site at New Clark City is designated as the first Pax Silica Economic Security Zone, and Manila has refused exceptional legal treatment for it (¶ 1.2, 1.4).
- PROPOSED The binding framework agreement is still a draft: nothing was signed during the US President's November visit, and Ambassador Romualdez says the government will seek legislation and that the arrangement is "not a treaty." The reported $100M-plus United States commitment is a pledge made "working with Congress," not an appropriation (¶ 2.1, 2.2, 2.7).
- PROPOSED The headline figures, $40B to $70B of investment and 130,000 to 190,000 jobs, are 30-year projections with no disclosed investor commitment (¶ 2.3).
- UNKNOWN Whether data centers will be sited at Clark: two of the signed documents name them, and the President now says "there will be no data centers" there (¶ 3.1).
- UNKNOWN No environmental assessment or land-conversion application has been reported, the Sapang Kawayan claim is unresolved while BCDA has named a relocation site, and the zone's rules are not yet written (¶ 4.2, 4.3, 4.4, 4.7).

Abstract

Seven months after the Philippines joined Pax Silica, the decided list is short: a signed declaration, a designated site, a port agreement, a legal refusal. The framework is still a draft, now headed for legislation. The money, investors and rules remain proposed, contested or unwritten. This brief sorts them as of November 22, 2026.

Decided

1.1 **Declaration signed.** The Philippines became the 13th Pax Silica signatory on April 16, 2026. [D1] [D2] The declaration is a political statement, not a binding agreement; Philippine officials describe participation as voluntary. [D3]

1.2 **Site designated.** 1,619 hectares (4,000 acres) inside New Clark City, on Bases Conversion and Development Authority (BCDA) land within the Luzon Economic Corridor (LEC). [D4] Billed as the first Pax Silica Economic Security Zone and its first "Golden Node." [D5]

1.3 **Subic as sea gateway.** A July 2026 agreement between BCDA and the Subic Bay Metropolitan Authority (SBMA) makes the Port of Subic Bay the preferred maritime entry and exit point. Joint port-readiness studies precede a 2028 groundbreaking target. [D6]

1.4 **Philippine law applies.** Manila refused a United States request for the zone to operate under American law. [D7] [D8] The Department of Trade and Industry (DTI) says all locators will comply with Philippine law. [D9]

1.5 **Industry roadmap launched.** Reported September 2026 targets: raise the Philippine share of global assembly, test and packaging from 4% to 7%, build an integrated circuit (IC) design sector exporting $2B to $3B a year, and reach $110B in electronics exports by 2030. [D10] [D11]

1.6 **Corridor forum held.** The inaugural LEC Investment Forum ran September 10 in Manila. The European Union and Spain joined the partnership, and a $60M Millennium Challenge Corporation (MCC) energy program was signed. [D12]

The four signed documents behind this section are posted by the Board of Investments. [D13] *They are read in full in CI Paper 2026-01, "What the Signed Papers Say."*

Proposed

2.1 **The framework agreement.** The instrument that would actually bind the parties is still being negotiated between BCDA and a United States government agency. BCDA submitted the legal framework to President Marcos on October 13; the Palace had not confirmed he reviewed it. [D14] The Palace targets signing before the end of 2026; the wording moved from the earlier November target timed to the Association of Southeast Asian Nations (ASEAN) Summit in Manila. [D15] On November 4 the Palace called it "only a draft agreement" awaiting the United States' response. [D16] Nothing was signed during the US President's state visit: "No, not on this trip," President Marcos said on November 18, and US Ambassador Lee Lipton said, "There'll be no signing." [D17] Two days later, in Shenzhen, Marcos said: "Wala pa tayong pinag-usapan. Wala pa tayong pinirmahan" ("We haven't discussed anything yet. We haven't signed anything yet"). [D18]

2.2 **The legislation route.** On November 20 Ambassador Jose Manuel Romualdez said the government had decided to take the project to Congress, and that "it's not a treaty, not at all. It's just a manufacturing hub." [D19] He said the proposed bill had been submitted by the Executive Secretary before going to

Congress, and would be taken up after the impeachment trial. [D][20] A separate measure, House Bill 11758, the Advanced Industries Development Act, was filed on October 26; it would create an Advanced Industries Zone in New Clark City under its own authority, with a seven-year income tax holiday and a 5% special corporate income tax for locators investing at least ₱15 billion. [D][21] Nothing public ties it to the bill Romualdez described. [I] Whether a statute removes the need for Senate concurrence is the subject of CI Paper 2026-02. [I]

2.3 **The headline numbers.** $40B to $70B in investment, 130,000 to 190,000 direct jobs, $200B in annual exports. These are BCDA projections over a build-out of up to 30 years. None is tied to a disclosed investor commitment. [D][22]

2.4 **The corridor dealbook.** The forum pitched 31 projects worth $17.6B to $20.7B. A Rappler review found about $5.1B pledged, in progress or completed, and several of the largest entries are pre-existing projects folded into the corridor. [D][23]

2.5 **Power and water.** The hub could need up to 3 gigawatts (GW) of power at full development. [D][24] BCDA puts water demand at 60 million to 90 million liters a day, to be sourced from rainwater through impounding structures, with recycling. [D][25] Dedicated power supply is under study: an approved Saudi-funded solar project, battery storage, and possibly a plant at Subic transmitting along the Subic-Clark-Tarlac Expressway (SCTEX). [D][26] Studied, not built. [I]

2.6 **Anchor investors.** More than 20 firms are reported interested in the hub, and the United States under secretary of state led a 12-company delegation to the site's marker unveiling. [D][27] No signed locator has been announced. [I]

2.7 **The July commitment.** Separate from the September forum, Washington committed in July, "working with Congress," more than $100M for Subic infrastructure, logistics and energy, according to the Secretary of State's readout of his meeting with President Marcos. [D][28] A pledge, not an appropriation. [I]

Contested

3.1 **Data centers.** On the text as posted, both the Pax Silica Declaration and the June joint statement name data centers. [D][29] [D][30] The Department of Science and Technology (DOST) secretary said there is no talk of a data center in Clark under the Pax Silica initiative, speaking on October 15, reported October 17, 2026. [D][31] The Palace said no company had formally proposed a data center under Pax Silica, and the Department of Trade and Industry told lawmakers none would be built within New Clark City, though such facilities could be built elsewhere, reported September 1, 2026. [D][32] On November 20 the President said: "There will be no data centers in the place that we are going to put this development on AI." [D][33] Meanwhile the Department of Information and Communications Technology (DICT) projects 300 to 400 megawatts of data-center capacity for the hub; that projection stands unexplained next to the denials. [D][34] The signed papers and the government's current position point in different directions on the site's use. [I]

Unknown

4.1 **Land terms: offered, not concluded.** BCDA's offer letter of April 9, 2026 puts about 4,000 acres on the table, lease-free for two years as an in-kind contribution, with rent from year three to be set by a later agreement. D[35] The United States accepted on April 16, subject to conclusion of a lease agreement. D[36] No lease agreement has been published. I

4.2 **No environmental impact assessment (EIA).** None applied for or processed as of end-August, the Department of Environment and Natural Resources (DENR) told a House hearing, while a signing target sits on the calendar. D[37]

4.3 **No land-conversion application.** The Department of Agrarian Reform (DAR) told a House hearing on September 3 that it has yet to receive any land-conversion application related to the hub. D[38]

4.4 **Aeta ancestral domain.** The Sitio Sapang Kawayan community says it has sought an ancestral domain title since 1984; the community's chieftain says a first endorsement came in 1994 and the title has still not been approved. D[39] A 1994 endorsement would fit the claim-certificate process the Department of Environment and Natural Resources (DENR) ran at the time, under its 1993 administrative order; the current title and the National Commission on Indigenous Peoples (NCIP) date from the 1997 Indigenous Peoples' Rights Act. P[40] What is unconfirmed: whether a claim certificate was issued, and whether it was converted to a title application after 1997. I BCDA said its officials met the Capas mayor on August 5 and the two sides agreed to hold community consultations. D[41] Nine days later the mayor told a Senate hearing that no consultation with local officials had taken place. D[42] On November 11 BCDA officials told the House that the relocation site would be in Sitio Binyayan, Barangay O'Donnell, about three kilometers from Sapang Kawayan; Human Rights Watch reports that the chieftain was told residents "will be relocated by December," and found that BCDA appears never to have secured the community's free, prior and informed consent. D[43] BCDA's response to the report has not been found. I

4.5 **No independent resource assessment.** Power and water sufficiency claims rest on BCDA statements. No independent engineering assessment, seasonal water balance, or drought scenario is public. D[44]

4.6 **Technology transfer terms.** No contractual detail has been disclosed. Treat as absent until published. I

4.7 **Zone rules unwritten.** None found in public records as of October 19: no customs administrative order creates a transshipment corridor across the several customs districts the corridor spans, and no schedule says which dual-use goods fall under the Strategic Trade Management Act. I

4.8 **Which chips, which tasks.** The mix at Clark, conventional assembly versus advanced packaging, test development, or design support, has never been specified publicly. The composition determines the value. D[45]

4.9 **Congress is watching.** The Senate formed a Committee of the Whole on September 8, D[46] and at least three House resolutions seek inquiries. D[47] The House committees on economic affairs and on trade and industry held a joint hearing on November 11, where BCDA said Philippine law would govern: "Sovereignty rests with the Philippines." D[48] Hearings could move the timeline or the terms. I

4.10 **New hands on the file.** Former Customs Commissioner Ariel Nepomuceno was sworn in as BCDA president on November 13, replacing Joshua Bingcang, who moves to the Philippine Economic Zone Authority. D[49] D[50]

Why it matters

5.1 Read the deal like a litigator, not a press release: the signatures so far are on a declaration, and the numbers so far are projections. Count only pledged-or-better money. By that measure the corridor today is roughly a $5B program wearing a $20B label, and the Clark hub is a project with a $40B to $70B brochure and no disclosed commitments. D[51] D[52] That is normal for this stage. It also means every headline figure should be discounted to its instrument: a signed declaration, a signed grant, a pledge awaiting Congress, or a projection. I

5.2 The most revealing event of the year was Manila's refusal of exceptional legal treatment. D[53] D[54] The framework agreement's governing-law, dispute-resolution and stabilization clauses are where that negotiation resurfaces. Those pages, not the press releases, are the deal. I

5.3 Terms before constraints. A signing targeted for year-end, now joined by a bill, is proceeding with no environmental assessment reported and no consent process concluded D[55] D[56] D[57], and nothing in the current rules requires one before signature. So terms are being fixed before the environmental and consent constraints are known. The questions to ask now, while asking is cheap: what will the eventual assessment cover, what happens to the ancestral-domain claim, and who bears the cost if the constraints arrive after the terms. I

5.4 Co-location is not upgrading. More assembly and test capacity delivers efficiency at tasks the Philippines already performs; the value sits in advanced packaging, design support and supplier linkages, none of which arrives by default. Five decades of participation in electronics assembly, testing and packaging without a sustained move into the functions that determine rents and technological direction is the warning, and the roadmap's 4%-to-7% assembly target would, by itself, repeat the pattern. D[58]

What to watch

6.1 Publication of the framework agreement text: parties, governing law, dispute resolution, stabilization clauses. I

6.2 A project-specific EIA filed with the DENR's Environmental Management Bureau (EMB), and an independent seasonal water balance. I

6.3 National Commission on Indigenous Peoples action on the Sapang Kawayan claim and any free, prior and informed consent (FPIC) process, and whether the December relocation goes ahead. I

6.4 The Pax Silica bill: House Bill 11758 or an administration bill, its committee path after the impeachment trial, and what it says on customs, dual-use goods and incentives. I

6.5 The first named anchor investor with a signed commitment, which tasks it will perform at Clark, and what the Senate Committee of the Whole produces. I

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22. Rappler, corridor pipeline analysis, note 17.

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24. South China Morning Post, sovereignty wall report, note 8.

25. GMA News, framework submission report, note 14.

26. SunStar/PNA, year-end signing report, note 15.

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28. UP CIDS discussion paper, note 16.

Annex A. Primary documents

The four signed Pax Silica instruments are posted by the Board of Investments as scans, and one statute is cited.

1. Bases Conversion and Development Authority letter to the US Department of State re Pax Silica Proposal, Apr. 9, 2026. How read: OCR from scan.
2. US Department of State reply accepting the BCDA offer, Apr. 16, 2026. How read: OCR from scan.
3. Pax Silica Declaration, Apr. 16, 2026. How read: OCR from scan.

4. Declaration on the Signing of the Joint Statement on the AI Opportunity Partnership, June 25, 2026, redacted. How read: OCR from scan.
5. Republic Act 8371, Indigenous Peoples' Rights Act of 1997. How read: full text.

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CORRECTIONS

Corrections are welcome and will be logged. Write to gene@corridorintelligence.net.

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The author is a US patent attorney, admitted in Colorado. He is not admitted to practice law in the Philippines. This is policy analysis of public material, not a legal opinion on Philippine law.

Independent analysis of the US–Philippines technology corridor: what the signed papers say, and what the physics requires.