CORRIDOR
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PAX SILICA SERIES, PIECE 1

# What the Signed Papers Say

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Independent analysis. Not legal advice.
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D **Documented.** From a public source listed in the sources.

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

## KEY JUDGMENTS

- DECIDED The Philippines offered about 4,000 acres at New Clark City for a "Pax Silica Coordination Office," lease free for two years; the United States accepted subject to a lease agreement; no lease agreement has been published (¶ 1.1, 2.1).
- UNKNOWN How environmental review, Indigenous consent, local government roles, phasing, the 2028 start and lease length will be handled is not yet written; none of the four signed documents addresses them (¶ 4.1).
- PROPOSED The Declaration and the Joint Statement state intentions ("we seek," "we intend," "we plan," "we desire"); on their face they commit neither government (¶ 3.1).
- UNKNOWN The framework agreement text, the offer's Annex A boundary maps, and the eventual lease terms are not public; no signing date is set (¶ 5.1, 6.1, 7.1).

## Abstract

The press coverage of Pax Silica runs on announcements, and the announcements run on four documents the Board of Investments posted between May and July 2026: an offer, an acceptance, a declaration, and a joint statement. This paper reads the four documents directly. The offer: about 4,000 acres at New Clark City for a "Pax Silica Coordination Office," lease free for two years, rent from year three to be discussed. The acceptance: yes, subject to a lease agreement; no lease agreement has been published. The declaration and joint statement state intentions and commit neither government on their face. None of the four mentions environmental review, Indigenous peoples, local governments, phasing, 2028, or a 99-year lease. The gap between the signed instruments and the announced $40 to 70 billion program is the fact to track. Three publications would close it: the framework text, the offer's boundary maps, and the lease agreement. None had appeared by November 22, 2026: the framework is still a draft, nothing was signed during the US President's visit, and no signing date is set. Read as of November 22, 2026.

## The offer

1.1 The press coverage of Pax Silica runs on announcements. The announcements run on four documents. The Board of Investments (BOI) posted them between May and July 2026: an offer, an acceptance, a declaration, and a joint statement. D[1] Everything else, the jobs figures, the 30-year build-out, the "first Economic Security Zone," is projection layered on top of those pages. This paper reads the pages. The posted copies are scans, read here by optical character recognition, and the maps referenced in the offer letter are not included in the posting, so the precise site boundaries cannot be verified from what is public. D[2] Where a phrase matters, it is quoted exactly as the scan carries it.

1.2 On April 9, 2026, the Bases Conversion and Development Authority (BCDA) wrote to United States (US) Under Secretary of State Jacob Helberg, in a letter delivered under a Philippine Embassy note verbale of April 16, offering about 4,000 acres inside the Luzon Economic Corridor for a "Pax Silica Coordination Office." The land would be "Lease Free" for a two-year grace period, as an "in-kind contribution"; the rent from year three is "To be discussed." Renewal is by mutual consent, and improvements revert to the Philippines. BCDA styles the instrument a "Supplemental Agreement," made "on behalf of the Philippine Government," citing Republic Act 7916, Republic Act 7227, and "other Philippine laws," while the US side cites 22 U.S.C. 2697 and the Foreign Affairs Manual. D[3] Republic Act 7916 is the Special Economic Zone Act, and Republic Act 7227 is BCDA's own charter; the letter prints "Republic Act No. 7277," an error in the original. D[4] 22 U.S.C. 2697 is the State Department's authority to accept gifts. D[5]

## The acceptance

2.1 The US reply on April 16 accepts, "subject to confirmation of the precise site location and boundaries and conclusion of an appropriate lease agreement." Separate arrangements are "subject to applicable requirements under U.S. law and the availability of funds." The parties "shall consult" on the "status of personnel," access, and security. There is no immunity language in the document. D[6]

2.2 That matters because Manila has since said it refused a US request to place the hub under American law with immunity for US personnel. D[7] Whatever that request looked like, it is not in these papers. I

## The declaration and the joint statement

3.1 The Pax Silica Declaration, signed for the Philippines on April 16, and the Joint Statement on the AI Opportunity Partnership of June 25, posted with redactions, both run on "we seek," "we intend," "we plan," "we desire." D[8] D[9] Neither, on its face, commits either government to anything. I

3.2 On the text as posted, both the Declaration and the Joint Statement name data centers. D[10] D[11] The Department of Science and Technology secretary said there is no talk of a data center in Clark under the Pax Silica initiative, reported October 17, 2026. D[12] 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[13] The signed papers and the government's current position point in different directions on the site's use. I

## What the papers do not say

4.1 None of the four documents mentions environmental review or an Environmental Compliance Certificate. None mentions Indigenous peoples or local governments. None mentions phasing, the year 2028, or a 99-year lease. D[14] D[15] D[16] D[17] The program described in speeches has little footing yet in the program described on paper. I

## The mismatch worth watching

5.1 The offered area and the public plan are the same site in two units. I 4,000 acres is about 1,619 hectares, the figure BCDA uses for the New Clark City hub. D[18] So the question is not where the site is. It is what the site is for. A two-year, rent-free offer sits oddly against the public description of the project: $40 to 70 billion of investment, three phases, 130,000 to 190,000 jobs over 30 years. Two readings are possible. If the pending "framework agreement" is essentially this offer, then the announced program has no documented legal home yet. If it is something broader, then the published papers understate what is being negotiated. Either way, the gap between the signed instruments and the announced program is the fact to track. Whether the whole 1,619 hectares is meant to sit under a "Coordination Office" offer is itself unanswered. I

## What would close the gap

6.1 Publication of the framework text: parties, governing law, duration. The Annex A maps to the offer letter, which fix the boundaries the acceptance left conditional. And the "appropriate lease agreement" the US made its condition: when it appears, its terms, not the forum speeches, will describe the project. For a firm weighing this corridor, the practical line is this: until the lease agreement and the framework text appear, nobody can underwrite anything against this site. I

6.2 For a firm or a ministry reading these papers as diligence, the open questions are practical. Where exactly is the site: the boundaries are conditional on the offer's Annex A maps, which are not posted, and on a lease agreement that has not been published. On what terms: the acceptance is subject to that lease, and the four instruments contain no commitments on incentives, taxation or power allocation D[19] D[20] D[21] D[22], though the Declaration names incentives and the Joint Statement names energy as areas of shared effort. Through what processes: the signed papers do not address environmental review, Indigenous peoples or local governments. And which gate matters first: until the framework text and the lease agreement are published, none of these questions has a documented answer. I

6.3 Processes that run outside the four signed instruments, including environmental review and the roles of Indigenous peoples and local governments, are not covered in this paper; CI Brief 2026-01 tracks them. Whether the framework must go to the Senate is the subject of CI Paper 2026-02.

## Since October 18

7.1 None of the three publications has appeared. On November 4 the Palace said the Philippines was awaiting the United States' response, and that "for now, it's only a draft agreement." D[23] On November 17 Ambassador Jose Manuel Romualdez said the process should not be rushed: "Before we sign anything, we want to ensure that every detail is thoroughly vetted and laid out clearly." D[24] On November 18, during the US President's state visit, President Marcos said of a signing, "No, not on this trip," and US Ambassador Lee Lipton said, "There'll be no signing." Trade Undersecretary Ceferino Rodolfo had earlier said the legal framework is still expected to be signed before the end of 2026. D[25]

7.2 The agency that wrote the offer letter has a new head. Former Customs Commissioner Ariel Nepomuceno was sworn in as BCDA president and chief executive on November 13. D[26] His predecessor, Joshua Bingcang, is being moved to head the Philippine Economic Zone Authority. At a hearing before the change, he said negotiations were still ongoing and no signing date was set, and GMA News reported that Philippine officials expect to include a clause preserving sovereignty over the site and stating that expatriates employed there will have no diplomatic immunity. D[27] That would put into the framework what the April acceptance left out. I

7.3 A statutory route has also opened. On November 20 Ambassador Romualdez said the government had decided to take the project to legislation, with hearings in both chambers. D[28] House Bill 11758, the Advanced Industries Development Act, filed in October, would create an Advanced Industries Zone in New Clark City under a dedicated authority, with a seven-year income tax holiday and a 5% special corporate income tax for locators investing at least ₱15 billion; its sponsors said only patrimonial land would be leased. D[29] As reported, the bill also states that the zone "remains fully under Philippine law and jurisdiction, and no immunity is granted to any person." D[30] A bill is not law, and it is not one of the signed instruments. But if it passes, the announced program would have a documented legal home in statute, whatever the framework says. That adds a third reading to the two in section 5. I

7.4 One remark could matter more than any of this. On November 20, speaking on Bilyonaryo News Channel's On Point, Ambassador Romualdez described the terms under discussion as "the parameters on the agreement, the memorandum of agreement which we signed last February, I think." D[31] No February instrument is among the four the Board of Investments posted, all of which date from April to June. Either he misspoke, or there is a fifth signed document that is not public. I

## Notes

1. Board of Investments, "Discussion on Pax Silica and the AI-native industrial acceleration hub." boi.gov.ph/discussion-on-pax-silica-and-the-ai-native-industrial-acceleration-hub/ (accessed Oct. 18, 2026; archived web.archive.org/web/20260830195510/https://boi.gov.ph/discussion-on-pax-silica-and-the-ai-native-industrial-accel-

eration-hub/). The four signed documents posted there are read by optical character recognition from scans (OCR from scan).

2. Board of Investments, "Discussion on Pax Silica," note 1.

3. Bases Conversion and Development Authority letter to the US Department of State re Pax Silica Proposal, Apr. 9, 2026 (OCR from scan). boi.gov.ph/wp-content/uploads/2026/05/BCDA-Letter-to-US-Dept-of-State-re-Pax-Silica-Proposal_.pdf (accessed Oct. 18, 2026; archived web.archive.org/web/20260814070854/https://boi.gov.ph/wp-content/uploads/2026/05/BCDA-Letter-to-US-Dept-of-State-re-Pax-Silica-Proposal_.pdf).

4. Republic Act 7916, Special Economic Zone Act of 1995, lawphil.net/statutes/repacts/ra1995/ra_7916_1995.html (accessed Oct. 18, 2026; archived web.archive.org/web/20250926194355/https://lawphil.net/statutes/repacts/ra1995/ra_7916_1995.html); Republic Act 7227, Bases Conversion and Development Act of 1992, lawphil.net/statutes/repacts/ra1992/ra_7227_1992.html (accessed Oct. 18, 2026; archived web.archive.org/web/20251206111322/https://lawphil.net/statutes/repacts/ra1992/ra_7227_1992.html).

5. 22 U.S.C. 2697. law.cornell.edu/uscode/text/22/2697 (accessed Oct. 18, 2026; archived web.archive.org/web/20261007230547/https://www.law.cornell.edu/uscode/text/22/2697).

6. US Department of State reply accepting the BCDA offer, Apr. 16, 2026 (OCR from scan). boi.gov.ph/wp-content/uploads/2026/05/Pax-Silica-1.pdf (accessed Oct. 18, 2026; archived web.archive.org/web/20260814071138/https://boi.gov.ph/wp-content/uploads/2026/05/Pax-Silica-1.pdf).

7. Philippine Star, "Philippines rejects US request for diplomatic immunity in planned AI hub," May 19, 2026. philstar.com/headlines/2026/05/19/2529065/philippines-rejects-us-request-diplomatic-immunity-planned-ai-hub (accessed Oct. 18, 2026; archived web.archive.org/web/20260923113023/https://www.philstar.com/headlines/2026/05/19/2529065/philippines-rejects-us-request-diplomatic-immunity-planned-ai-hub).

8. Pax Silica Declaration, Apr. 16, 2026 (OCR from scan). boi.gov.ph/wp-content/uploads/2026/05/Pax-Silica-Declaration-PH-US-signed-04-16-26_.pdf (accessed Oct. 18, 2026; archived web.archive.org/web/20260814065617/https://boi.gov.ph/wp-content/uploads/2026/05/Pax-Silica-Declaration-PH-US-signed-04-16-26_.pdf).

9. Declaration on the Signing of the Joint Statement on the AI Opportunity Partnership, June 25, 2026, redacted (OCR from scan). boi.gov.ph/wp-content/uploads/2026/07/Declaration-on-the-Signing-of-the-Joint-Statement-on-AI-Opportunity-Partnership-1-redacted.pdf (accessed Oct. 18, 2026; archived web.archive.org/web/20260830195517/https://boi.gov.ph/wp-content/uploads/2026/07/Declaration-on-the-Signing-of-the-Joint-Statement-on-AI-Opportunity-Partnership-1-redacted.pdf).

10. Pax Silica Declaration, note 8.

11. Declaration on the Signing of the Joint Statement, note 9.

12. Inquirer, "DOST chief: No talk of data center in Clark under Pax Silica initiative," Oct. 17, 2026. newsinfo.inquirer.net/2325287/dost-chief-no-talk-of-data-center-in-clark-under-pax-silica-initiative (accessed Oct. 18, 2026).

13. BusinessMirror, "Palace: No formal proposal yet for Pax Silica data center," Sept. 1, 2026. businessmirror.com.ph/2026/09/01/palace-no-formal-proposal-yet-for-pax-silica-data-center/ (accessed Oct. 18, 2026).

14. BCDA letter, note 3.

15. US Department of State reply, note 6.

16. Pax Silica Declaration, note 8.

17. Declaration on the Signing of the Joint Statement, note 9.

18. Bases Conversion and Development Authority, "New Clark City to serve as AI hub under US-led Pax Silica Initiative," Apr. 20, 2026. bcda.gov.ph/news/new-clark-city-serve-ai-hub-under-us-led-pax-silica-initiative (accessed Oct. 18, 2026; archived web.archive.org/web/20261010110153/https://www.bcda.gov.ph/news/new-clark-city-serve-ai-hub-un-

der-us-led-pax-silica-initiative).

19. BCDA letter, note 3.

20. US Department of State reply, note 6.

21. Pax Silica Declaration, note 8.

22. Declaration on the Signing of the Joint Statement, note 9.

23. Daily Tribune, "Philippines awaits US response on Pax Silica deal, Palace says," Nov. 4, 2026. tribune.net.ph/2026/11/04/philippines-awaits-us-response-on-pax-silica-deal-palace-says (accessed Nov. 22, 2026).

24. Daily Tribune, "Romualdez: Philippines, US won't rush Pax Silica agreement," Nov. 17, 2026. tribune.net.ph/2026/11/17/romualdez-philippines-us-wont-rush-pax-silica-agreement (accessed Nov. 22, 2026).

25. GMA News, "Marcos, Lipton: No signing of Pax Silica during Trump's state visit," Nov. 18, 2026. gmanetwork.com/news/topstories/nation/1009914/marcos-lipton-no-signing-of-pax-silica-during-trump-s-state-visit/story (accessed Nov. 22, 2026). Rodolfo's statement is reported in paraphrase.

26. Daily Tribune, "Palace rigodon goes full steam," Nov. 13, 2026. tribune.net.ph/2026/11/13/palace-rigodon-goes-full-steam (accessed Nov. 22, 2026).

27. GMA News, "BCDA president Joshua Bingcang to lead PEZA, says DOF chief," Nov. 12, 2026. gmanetwork.com/news/money/economy/1009302/bcda-president-joshua-bingcang-to-lead-peza-says-dof-chief/story/ (accessed Nov. 22, 2026).

28. Daily Tribune, "Pax Silica hub to go through Congress, Amb. Romualdez," Nov. 20, 2026. tribune.net.ph/2026/11/20/pax-silica-hub-to-go-through-congress-amb-romualdez (accessed Nov. 22, 2026). Quoted in Taglish: "I think it's being proposed na magkakaroon ng legislation."

29. GMA News, "Bill filed establishing ecozone for Pax Silica ops, other critical industries," Oct. 26, 2026. gmanetwork.com/news/topstories/nation/1007221/bill-filed-establishing-ecozone-for-pax-silica-ops-other-critical-industries/story/ (accessed Nov. 22, 2026). Bill text not read; provisions as reported. Not to be confused with Republic Act 11758 (2022), an unrelated statute.

30. Politiko, filing report on House Bill 11758 (Billy Begas), Oct. 26, 2026, quoting the bill (read Nov. 22, 2026 by an independent research assistant).

31. Politiko, "Congress gets a say! Marcos admin eyes law for US-backed Pax Silica hub," Nov. 21, 2026, quoting the On Point broadcast of Nov. 20, 2026 (Bilyonaryo News Channel; youtube.com/watch?v=9yyhCNvifYs, whose auto-captions match the quoted words). politiko.com.ph/congress-gets-a-say-marcos-admin-eyes-law-for-us-backed-pax-silica-hub/ (read Nov. 22, 2026 by two independent research assistants, one of whom also checked the broadcast).

## Annex A. Primary documents

Read for this paper, all posted by the Board of Investments as scans and read by optical character recognition.

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, full document. The referenced Annex A maps are not included in the posting.
2. US Department of State reply accepting the BCDA offer, Apr. 16, 2026 (posted as "Pax-Silica-1.pdf"). How read: OCR from scan, full document.
3. Pax Silica Declaration, signed Apr. 16, 2026. How read: OCR from scan, full document.
4. Declaration on the Signing of the Joint Statement on the AI Opportunity Partnership, June 25, 2026 (redacted). How read: OCR from scan, full document as redacted.
5. Republic Act 7916 (Special Economic Zone Act of 1995) and Republic Act 7227 (Bases Conversion and Development Act of 1992). How read: full text (see Annex B).
6. 22 U.S.C. 2697 (acceptance of gifts on behalf of the United States). How read: full text (see Annex B).

## Annex B. Sources

### Primary


- Board of Investments, "Discussion on Pax Silica and the AI-native industrial acceleration hub" (posts the four signed documents). boi.gov.ph/discussion-on-pax-silica-and-the-ai-native-industrial-acceleration-hub/ (accessed Oct. 18, 2026; archived web.archive.org/web/20260830195510/https://boi.gov.ph/discussion-on-pax-silica-and-the-ai-native-industrial-acceleration-hub/).
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- 22 U.S.C. 2697. law.cornell.edu/uscode/text/22/2697 (accessed Oct. 18, 2026; archived web.archive.org/web/20261007230547/https://www.law.cornell.edu/uscode/text/22/2697).


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### Commentary

- None cited in this paper.

## Annex C. Version

| Version | Date | Change |
|---|---|---|
| v1.0 | November 22, 2026 | First publication. |

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


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**CORRECTIONS**

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

**NOT LEGAL ADVICE**

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.

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