

As of 23 February 2011



Electronic Data Processing



Semiconductors



Telecommunications



Communications and Radar



Consumer Electronics



Office Equipment



Automotive Electronics



Control & Instrumentation



Medical & Industrial



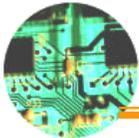
Solar/ Photovoltaics



BACKGROUND

The Philippine electronics industry began in the mid-seventies when industrialized nations relocated their production facilities to third world countries in order to control the escalating cost of production. The Philippines was an ideal relocation site due to its cost competitive, highly-educated and English-speaking labor. Other factors included the country's geographical location (being at the crossroads of international trade), and attractive government incentives.

The conditions that encouraged foreign electronics companies to turn to the Philippines have remained and have been further enhanced by the country's political transition to popular democracy in 1986. Since then, the industry has grown rapidly and overtook agriculture as the leading export earning industry in 1996.



INDUSTRY COVERAGE

The Philippine electronics industry covers the following sub-sectors:

(1) Semiconductors and Other Components

This is the biggest sub-sector of the electronics industry consisting of companies manufacturing integrated circuits (ICs), transistors, diodes, resistors, capacitors, coils, transformers, PCBs and other components. Major players in this sub-sector are the subsidiaries of some of the world's biggest semiconductor companies such as Texas Instruments, Philips, Amkor, Fairchild Semiconductor, etc.

(2) Electronic Data Processing (EDP) Equipment

This sub-sector consists of companies engaged in the manufacture of computers, peripheral storage and input/output devices. Among the finished products are laptops, desktop PCs, printers, computer monitors, drives: hard disk, optical, ZIP and CD-ROM. Companies engaged in the manufacture of EDP are Toshiba, Wistron Infocomm (formerly Acer), Epson, Fujitsu, Ionics and Sampo Technologies. The Philippines proudly supplies fifty percent (50%) of the world demand for 2.5" HDD and ten percent (10%) of world demand for 3.5" HDD.

(3) Office Equipment

This sub-sector includes companies, which are into production of photocopiers, fax machines and electronic calculators. Companies in this sub-sector include Masushita Business Machines, Sharp and Seiyo Electronics.

(4) Telecommunications Equipment

Included in this sub-sector are companies producing telephone sets, modems, copper communication cables and fiber optic cables. Manufacturers include ETSI Technologies, Eupen Cable and NEC Technologies.

(5) Communications and Radar

Companies in this sub-sector comprised mainly of manufacturers of cellular phones, pagers, closed circuit television (CCTV), CB transceivers, radar detectors, marine and land mobile radios. Leading players include Matsushita Communication, Uniden, Casio and Euro CB.

(6) Control and Instrumentation

This sub-sector refers to test and measuring instruments such as oscilloscopes, signal generators, ammeters, voltmeters, ohmmeters, cross talk meters, etc. Philippine-based companies in this sub-sector consist of manufacturers of PCB assemblies for instrumentation/testing equipment, digital thermometers, microscope, automotive test equipment and multi-testers. Players include Precision Microcircuits, Sara Digital Network, Phil Makoto Corp., and Insung Phils. Electronics.

(7) Medical and Industrial

This sub-sector covers equipment used for X-ray and other medical applications, railway signaling, security and fire alarms. Philippine-based companies are involved in the production of spiro analyzers and smoke detectors. One of the leading players is P. Imes Corp.

(8) Automotive Electronics

Companies in this sub-sector comprised mainly of manufacturers of car stereos, Anti-Skid Brake Systems (ABS), and Car Body Electronics (CBE). Major players include Temic Automotive, Fujitsu Ten, Muramoto Audio-Visual Phils., and Clarion Mfg.

(9) Consumer Electronics

Consumer electronics manufacturing in the country primarily consists of TV sets, VCD players, electronic games, radio cassette players and karaoke machines. Major players include Panasonic Manufacturing Philippines Corporation (PMPC), Sony, Sharp, LG –Collins and JVC.

(10) Solar/ Photovoltaics

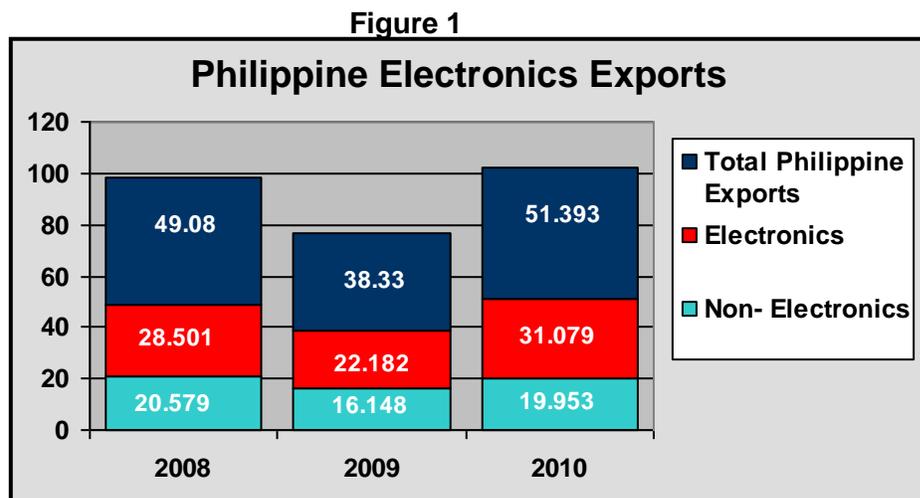
This emerging subsector of the electronics industry consist of devices that make use of solar cells in producing electricity for practical use. The presence of big international companies such as SunPower Manufacturing Ltd. (SPML) and Solaria Corporation helps in positioning the Philippines as a solar manufacturing hub in Asia.



EXPORTS

The Philippine electronics industry remains to be the major contributor to the economy, accounting for 61.18% of total exports for 2010.

As shown in Figure 1, exports of electronic products dropped by 28.17% from US\$28.501 billion in 2008 to US\$22.182 billion in 2009, as a result of the global economic crisis during that period. However, the industry posted a 41% increase in exports from US\$22.182 billion in 2009 to US\$31.079 billion in 2010.



Source: NSO

A. Exports by sub-sector

The summary of Philippine merchandise exports by major product grouping is shown in Table 1:

Table 1: Summary of Philippine Exports (2009 and 2010)

Group	2009	2010	% Change
Total Exports to All Countries	US\$ 38 B	51 B	34.21
Electronics	22.182 B	31.079 B	41.81
Semiconductors	16.0 B	23.8 B	48.75
Electronic Data Processing (EDP)	5.0 B	5.5 B	10.00
Automotive Electronics	532 M	380 M	(28.57)
Consumer Electronics	301 M	293 M	(2.66)
Office Equipment	250 M	242 M	(3.2)
Communication/ Radar	391 M	695 M	77.75
Control/ Instrumentations	42 M	39 M	(7.14)
Medical/ Industrial	32 M	35 M	9.375
Telecommunications	118 M	78 M	(34.19)

Source: NSO (Note: Numbers do not add up due to rounding off)

Telecommunications suffered the biggest decline in exports with a negative 34.19% growth rate from 2009 to 2010, while Communication/ Radar products showed the highest growth rate at 77.5%.

Semiconductors, EDP, Communication/ Radar, and Medical/ Industrial products registered positive growth rates. On the other hand, Automotive Electronics, Consumer Electronics, Office Equipment, Control/ Instrumentations, and Telecommunications recorded negative growth rates.

B. Historical Data (11 years)

Table 2 below shows the share of electronics in the total export of the country from 2000 – 2010:

Table 2: Share of Electronics in Total Exports

Year	Phil. Exports (Values in US\$ B)	Electronics Exports (Values in US\$ B)	% Share to Total Exports
2000	38.077	27.166	71.34
2001	32.150	21.909	68.15
2002	35.066	24.321	69.08
2003	36.231	24.168	66.71
2004	39.598	26.645	67.29
2005	41.223	27.304	66.23
2006	47.028	29.718	62.92
2007	50.500	31.023	61.43
2008	49.080	28.501	58.16
2009	38.436	22.182	57.87
2010	51.393	31.079	61.18

Source: NSO/DTI

The industry's share in the total exports of the Philippines registered an average of 64.58% for the period of 2000-2010. As shown in Table 2, the share of electronics in total Philippine exports experienced a series of decline from 71.34% in 2000 to 66.71% in 2003. It increased by small percentage in 2004 at 67.28%, but again declined to 66.23% in 2005. It continued to decline until 2009, which is the lowest percentage share for the past ten years at 57.87%

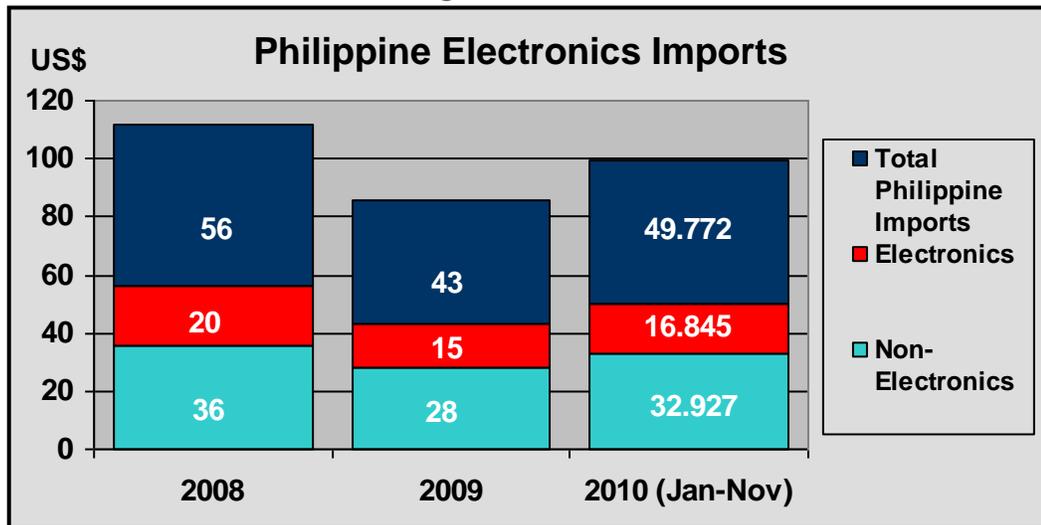
As the global economy begun to stabilize, the industry recorded its highest export value at US\$ 31.440 billion or 61.18% of the total Philippine exports.



IMPORTS

The total Philippine imports for the period of January to November 2010 were registered at US\$ 49.772 billion, 33.85% of which accounts for imports of electronic products valued at US\$16.845 billion (Figure 2).

Figure 2



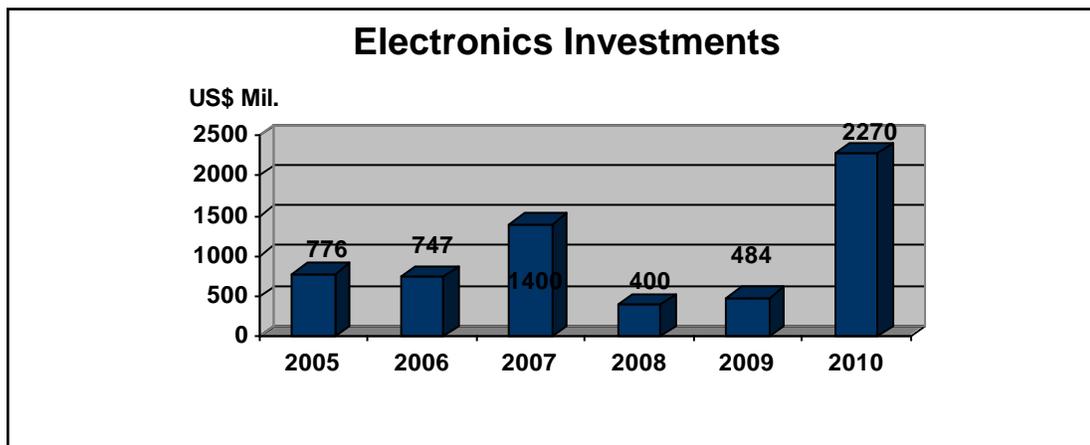
Source: NSO/DTI



INVESTMENTS

Investments climate in the Philippines is very liberalized. 100% foreign ownership is allowed in certain areas of investments. In 2010, investments in the industry registered its highest value at US\$2.27 Billion.

Figure 3



Source: PEZA

A. Historical Data (10 years)

Promising inflow of Investments in the electronics sector in the Philippines for the last ten (10) years is summarized below (Table 3). It may be noted, however, that investments in the industry declined in 2008 and 2009 due to the global economic crisis.

Table 3

YEAR	INVESTMENTS
2001	US\$ 720 Million
2002	270 Million
2003	230 Million
2004	443 Million
2005	776 Million
2006	747 Million
2007	1.4 Billion
2008	400 Million
2009	484 Million
2010	2.27 Billion

Source: BOI & PEZA

B. Size of Available Location for Investments

The size of available location for investments is shown in Table 4.

Table 4

Agency	Available Locations
BOI	No preferred location
PEZA (as of 31 December 2010)	Operating Economic Zones 2 Medical Tourism/ Parks 12 Tourism Zones 13 Agro-Industrial Zones 64 Manufacturing Zones 148 IT Parks/Center
	Economic Zones Being Developed 3 Agro-Industrial Zones 7 Tourism Zones 26 Manufacturing Zones 60 IT Parks/Center
SBFZ	1,663.22 Hectares

Source: PEZA; SBMA Land and Asset Management Dept.

C. Minimum Investment Costs

There is no minimum investment costs for new locators / new business registrations as long as their financial standing can support or maintain their operations.

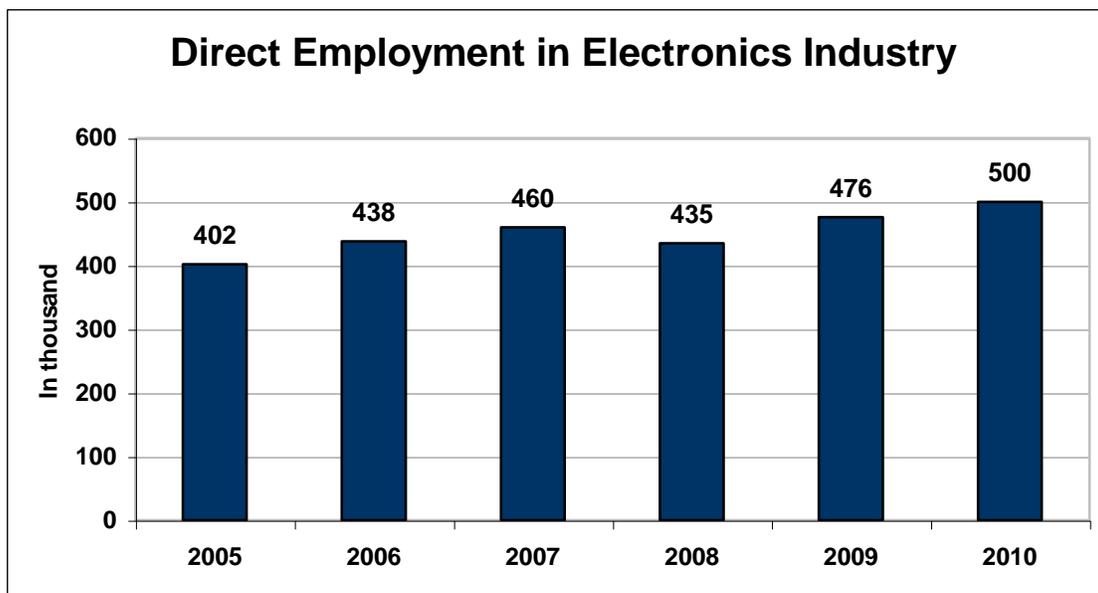


EMPLOYMENT

The Philippines remains to be the number one supplier of knowledge-based jobs and workers worldwide with an immediately available labor force of 32 million and over 100,000 engineering, IT, and technical graduates every year.

As of 2010, the electronics industry has generated half a million direct employment. It registered a growth rate of 5% from 476,000 in 2009 to 500,000 in 2010.

Figure 4



Source: SEIPI



HUMAN RESOURCES

A. Quality

The Philippines is an ideal relocation site due to its highly educated and competent English-speaking labor; excellence in customer service and communications skills; and highly skilled manpower pool.

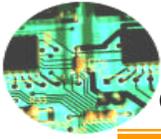
B. Costs

Table 5 below shows the annual base pay of the semiconductor and electronics sector workers. Individual employee performance is still considered as the most common criteria for granting base salary increases in the industry.

**Table 5: Annual Basic Pay of Semiconductors and Electronic Workers
(as of 01 July 2007)**

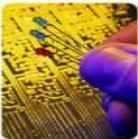
Position	Minimum	Maximum	Average
CEO - Large Company	6,126,849.00	9,192,436.00	7,444,707.00
Executive Assistant	216,476.00	701,368.00	486,238.00
Financial Accounting Manager	683,336.00	1,369,318.00	978,312.00
Accountant	193,264.00	682,913.00	432,607.00
Human Resource Manager	862,093.00	1,630,095.00	1,260,791.00
HR Specialist	267,361.00	652,549.00	475,627.00
Head of IT/IT Director	1,440,000.00	3,000,000.00	2,237,614.00
General IT Analyst/Assistant	189,329.00	244,027.00	216,678.00
Applications/Systems Devt. Manager	829,294.00	1,786,202.00	1,182,092.00
Systems Analyst (I, II, III)	196,800.00	825,118.00	455,282.33
Systems Engineer (I, II, III)	187,200.00	708,306.00	380,899.50
Programmer (I, II, III)	180,000.00	544,503.00	284,416.00
Head of Engineering	2,104,509.00	4,507,800.00	3,167,109.00
Head of Manufacturing	1,700,000.00	4,243,220.00	3,078,358.00
Head of Production	1,060,692.00	2,717,762.00	1,939,828.00
Maintenance Engineering Manager	550,160.00	1,761,972.00	1,297,861.00
Maintenance Engineer (II, III)	171,139.00	568,008.00	352,065.00
Production / Plant Manager	611,208.00	1,395,659.00	984,903.00
Production Operator (Skilled)	104,008.00	156,677.00	129,511.00
Production Operator (Unskilled)	84,864.00	100,232.00	90,175.00
Production Industrial Engineering Manager	699,782.00	1,305,741.00	993,638.00
Production/Industrial Engineer (I, II, III)	168,024.00	742,633.00	409,246.33
Research & Product Devt. Manager	931,803.00	1,582,034.00	1,282,750.00
Research & Product Devt. Specialist/Engineer (I, II, III)	191,832.00	504,440.00	450,438.67
Design Engineering Manager	640,354.00	1,861,968.00	1,170,255.00
Design Engineer (I, II)	265,931.00	870,168.00	494,341.50
Product Engineering Manager	671,026.00	1,427,264.00	1,037,106.00
Product Engineer	181,566.00	492,163.00	314,046.00
Process Engineering Manager	662,304.00	1,440,480.00	986,346.00
Process Engineer (I, II, III)	156,000.00	803,077.00	391,210.00
Test Devt. Engineering Manager	643,873.00	1,417,766.00	1,020,397.00
Test Development Engineer	202,929.00	564,000.00	381,877.00

Source: Electronics Industry



COMPETITIVE ADVANTAGES

- (1) Competitive labor costs and availability of technical labor
- (2) English-speaking population
- (3) Superiority in programming and maintenance of delivery commitments
- (4) Excellence in customer service and communications skills
- (5) Compliance with international standards both in quality and environmental management systems
- (6) Flexible operating hours where factories operate for three (3) shifts including Sundays and holidays
- (7) Availability and accessibility of export zones in selected regions
- (8) Fast processing of import/export documents
- (9) Diversified product lines
- (10) Presence of multinational companies
- (11) Active support of the government



CHARACTERISTICS OF THE INDUSTRY

(1) Dominated by Multinational Corporations

Multinational companies who have put up their firms in the Philippines include Intel and Texas Instruments from the United States, Continental Temic and NXP (formerly Philips) from Europe, Sony, Toshiba, Hitachi and Fujitsu from Japan, Samsung from South Korea and Acer and OSE from Taiwan.

(2) Export- Oriented

Very little of the output of the industry is sold in the country as domestic competition is weak for these products except for consumer electronics. Majority of the output of the electronic firms is sold to their parent companies. Thus, majority of the sales of electronic firms represent export sales.

(3) Engaged in assembly and test manufacturing activities

The Philippine electronics industry's expertise has been widely accepted to be in backend semiconductor operations and assembly & test. However, there are several firms that are also into Electronics Manufacturing Services (EMS) and a few Filipino SMEs into Original Design Manufacturing (ODM). This makes the industry an important source of employment.

(4) High Quality and Productivity

Emphasis on high quality products and services and the drive towards higher productivity among workers and production facilities is very important in the industry as more and more of these firms adapt the best-known methods in manufacturing such as JIT, TQM, 5S, etc. In addition, most Philippine electronics firms are ISO-certified and have in-house training capabilities making it more attractive to foreign investors to expand or relocate their businesses here. A typical electronic company in the Philippines operates with clean rooms and fully integrated manufacturing facilities.

(5) Growing Base of Components Supplier

It can be said that the industry is highly competitive as multiple players are found in each sub-sector. The presence of a growing base of components supplier boost the country's image as ideal relocation site as there will be a lesser need to look for component parts outside the country. This complements the industry as it offers a wide variety of products and services ranging from IC Packaging, PCB assembly and full product assembly.



MARKET OPPORTUNITIES/ POTENTIAL PLAYERS

A. Integrated Industry-Government Strategy for Market Growth

- (1)** Shift from its present electronics product portfolio to Electronics Manufacturing Services (EMS) and later to other segments of the electronics value chain which offers spillover/linkage opportunities.
- (2)** Investments promotion for Solar Power, Aerospace, Automotive, Medical and Military Companies.

B. Supply Chain Development

- (1)** Supplier Development/Matching (for robust supplier base)



INDUSTRY ISSUES AND CONCERNS

- (1) Quality, Reliability and Cost
- (2) Cost and Availability of Infrastructure (Power, Water, Transportation, etc.)
- (3) Time to Market
- (4) Retention and Migration of IC Design Engineers
- (5) Development of Electronics Supply and Value Chain
- (6) Increasing market restrictions
- (7) Increased focus on energy reduction
- (8) Environmentally conscious electronics
- (9) Growth of Automotive Electronics
- (10) Convergence (Driven by Wireless/ Portable Products)
- (11) Medical Electronics
- (12) Miniaturization and thinner products
- (13) Emergence of Solar/ Photovoltaics



GLOBAL TRENDS

(1) Opportunities in the Solar Industry

Solar energy is one segment in printed electronics in which there are rising hopes of a major breakthrough in terms of technology and production processes. Germany is currently a worldwide leader for the application of solar cells for the generation of heating and electricity.

The solar power industry has a potential to have a significant impact on cities and communities in the form of local capital investment and the creation of long-term jobs in a rapidly growing, high technology industry.

The industry is composed of large and big companies which push their own technologies. However, even with the tight competition, the playing field offers wide opportunities for developing countries such as the Philippines, particularly in manufacturing and in the downstream and applications areas of the value chain.

The Philippines' semiconductor and electronics industry is working closely with local universities, industries, and investors with the aim of offering significant opportunities for innovation, particularly in solar energy applications development and manufacturing-process reengineering and optimization.

To date, the Philippines is home to two (2) large solar companies, namely; SunPower Manufacturing Ltd. (SPML) and Solaria Corporation. SunPower already

has two (2) manufacturing facilities in Philippines and together with the First Philippine Electric Corporation (First Philec), a joint-venture project was formed, which paved the way for the creation of First Philec Solar Corporation (FPSC).

FPSC, which is the first large-scale silicon-wafer-slicing company in the Philippines envisions to have 100 multi-wire saws producing 240 million wafers annually to support approximately 720 megawatts of solar energy.

Solaria, which is a Silicon Valley-based company, manufactures solar panels in the Philippines. It operates locally through contract manufacturer Ionics EMS.

According to the Semiconductor and Electronics Industries in the Philippines, Inc. (SEIPI), companies like Solaria and SunPower represent the magnets helping to attract other pieces of the solar supply chain that specialize in things such as solar glass, frames, equipment design, automation, etc.

In order to fully utilize the wide array of economic benefits, Philippines must leverage the presence of existing solar companies to jump-start its own local solar industry.

SEIPI's new goal is to make the Philippines as a Solar Manufacturing hub in Asia.

(2) Breakthroughs in Printed Electronics

Printed electronics would make increasing demands for greater quality and process controls, particularly since the range of production processes is widening (*WT Technical Research, Finland*). Components like optoelectronic devices, sensors, indicators and power sources can be integrated with printed systems on web, sheet or foil. This is the case with OLED displays, signage, solar cells and miniaturized fuel cells. Merck Chemicals (Chilworth, England), the organic electronics subsidiary of Merck KGaA of Germany is concentrating on the development of materials and printable formulations for organic electronic applications and is involved with partners in projects for the co-development of printing processes and of components and devices. Over the next few years, matching materials with the most suitable and cost effective processes is likely to be a priority among companies in printed electronics in Europe.

(3) Green Campaign

European reaction to an ever-growing mountain of discarded cell phones, computers, televisions, MP3 players, and other electronics equipment has put electronic companies in Asia and elsewhere in a scramble to respond. Two recent European Union (EU) directives aim to boost recycling of old electronics, curtail use of hazardous substances in manufacturing, and improve the environmental performance of producers. These tough "green" regulations could serve as trade barriers to electronics exports to China, the world's third-largest trading country.



GOVERNMENT SUPPORT/POLICIES

A. Applicable Investment Policies

- (1) Omnibus Investments Code of 1987 (EO 226)
- (2) Investments Priorities Plan
 - (2.1) Entitlement to Incentives
 - (2.2) Equity Ownership
 - (2.3) Equity Requirement
 - (2.4) Regional Dispersal of Industries
 - (2.5) Exemption from Locational Restriction
- (3) Special Economic Zone Act of 1995 (RA7916)

B. Plans and Programs

- (1) Aggressive Investment Promotion
 - (1.1) Target emerging markets forecasted to achieve faster economic recovery rates; primarily India, China and ASEAN
 - (1.2) Capture export-oriented foreign Direct Investments (FDIs) from EU and Japan
 - (1.3) Identify and Conduct 6-8 investment missions per year with the private sector
 - (1.4) Boost the Export Support Fund (ESF) to promote the country through selling missions, trade events and interactive television media
 - (1.5) Capture investments into the economic zones
- (2) Competitive Manufacturing Cost
 - (2.1) Reduction of cost of power
 - (2.2) Continue the implementation of the ASEAN Roadmap for Integration of Electronics Industry
- (3) Establish Human Competencies throughout the Value Chain
 - (3.1) Pursue the Unified Microelectronics Program for MicroEd/ERDT university participants
 - (3.2) Establishment of IC Design Training Center in the Philippines
 - (3.3) Continue the initiative on linking Phil. Academe with leading foreign universities
 - (3.3) Continue the RP- Taiwan collaboration on trainings on IC Design complemented with the acquisition of a lab-scale wafer fab for training purposes

(4) Robust Supplier base

- (4.1) Participate in the global supply chains with India, China and ASEAN as primary destinations for re-export to EU and US leveraging cost-benefit impact on mid-priced and premium products/ services while realizing increments from a rapid growth consumer base in the primary destination.
- (4.2) Promote Filipino supply & value chain participation as a quality and cost-effective component to finished goods/services
- (4.3) Invite identified suppliers from Taiwan and Japan
- (4.4) Continue holding Industry Link regularly
- (4.5) Encourage technopreneurship
- (4.6) Link SMEs in the allied electronics industry to institutions that will provide financial/ technological support

(5) Other intervention strategies

- (5.1) Continue close networking with other government agencies in addressing imperatives (infrastructure, security, VAT claims, etc.)
- (5.2) Participate actively in different international fora (Taipei Summit, ASEAN PIP, WTO NAMA, APEC, etc.)

C. Incentives (BOI, PEZA, SBFZ)

(1) Board of Investments

Under Book I of the Omnibus Investments Code, BOI-registered enterprises are given a number of incentives in the form of tax exemptions and concessions. These are:

(1.1) Fiscal Incentives

- a. Income Tax Holiday (ITH)
 - Six (6) years- new projects with pioneer status
 - Four (4) years- new projects with non- pioneer status
 - Three (3) years- expansion/ modernization projects
 - Six (6) years- new or expansion projects in less developed areas
- b. Duty Exemption on Imported Capital Equipment Spare Parts and Accessories (E.O. 528) -until June 2011'
- c. Exemption on Wharfage Dues, Export Tax, Duty, Impost and Fees
- d. Tax Exemption on Breeding Stocks and Genetic Materials
- e. Tax credits (for export producers only)
 - Tax credit on tax/duty portion of domestic breeding stocks and genetic
 - Tax credit on raw materials and supplies

f. Additional Deductions from Taxable Income

- Additional deduction for labor expense
- Additional deduction for necessary and major infrastructure works

(1.2) Non- Fiscal Incentives

- a. Employment of foreign nationals
- b. Simplification of customs procedures
- c. Tax and Duty-free Importation of Consigned Equipment for a period of ten (10) years
- d. Privilege to operate a Bonded Manufacturing warehouse

(1.3) Incentives for Regional Headquarters and Regional Operating Headquarters in the Philippines

(2) Philippine Economic Zone Authority (PEZA)

PEZA provides the following fiscal incentives for existing PEZA-registered enterprises-Export enterprises registered with the Export Processing Zone Authority.

(2.1) Income Tax Holiday (ITH) – 100% exemption from corporate income tax

- Four (4) years ITH for Non-pioneer Project
- Six (6) years ITH for Pioneer Project

(2.2) Three (3) years ITH for Expansion project (ITH applies to incremental sales)

(2.3) Upon expiry of the Income Tax Holiday - 5% Special tax on Gross Income and exemption from all national and local taxes.

(2.4) Tax and duty free importation of production equipment and machineries, breeding stocks, farm implements including spare parts and supplies of the equipment and machineries.

(2.5) Exemption from export taxes, wharfage dues, impost and fees

(2.6) VAT Zero Rating on local purchases of goods and services, including land-based telecommunications, electric power, and water bills

(2.7) Exemption from payment of local government fees such as Mayor's Permit, Business Permit, permit on the Exercise of profession/Occupation/Calling, Health Certificate Fee, Sanitary Inspection Fee, and Garbage Fee

(3) Subic Bay Free Zone (SBFZ)

Subic Bay has a veritable edge as an investment area because of its Freeport status. It is considered a special customs territory where there is free flow of goods and capital equipment.

Investors in SBFZ enjoy these following business incentives and privileges:

- (3.1) Exemption from all local and national taxes such as ad-valorem and excise taxes

Investors are only required to pay a corporate tax of 5 percent from their gross adjusted income. Subic Bay Freeport Enterprises (SBFEs) may also avail of tax holidays if they register with the Philippine Board of Investments (BOI).

- (3.2) Duty-free importation of raw materials, supplies, capital equipment and other items for consumption within the Freeport
- (3.3) Foreign investors may invest up to 100% equity in almost any economic activity in the SBF except for businesses where foreign ownership is limited by the Constitution.
- (3.4) There are no foreign exchange controls in the Freeport and full repatriation of profit is allowed.
- (3.5) The SBMA also processes and grants special resident and investor visas. A foreign investor with an investment of at least US\$250,000 may be granted a Subic Special Investor Visa. Temporary work permits and Subic Special Work Visas could also be granted to foreign nationals subject to certain requirements.

D. Support/ Cooperation of Industry Associations

The Board of Investments works closely with the various semiconductor and electronics industries associations:

- (1) Semiconductor and Electronics Industries in the Philippines, Inc. (SEIPI)
- (2) Electronics Industries Association of the Philippines, Inc. (EIAPI)
- (3) Philippine Appliance Industry Association (PAIA)

E. Existing Support Industry

The Board of Investments also works closely with the Advanced Research Center for Development, Inc. (ARCDI) and the Congressional Commission on Science and Technology and Engineering (COMSTE). ARCDI provides high-quality and cost effective training and competency development support to semiconductor and electronics industry players. It offers training modules on specific competency areas which are centered on industry requirements. COMSTE, on the other hand, is mandated to undertake a national review and assessment of the science, engineering, and technology research and development system of the country.



CONTACT DETAILS

**Business Development Team for Electronics
Special Programs Department
Board of Investments (BOI)**

Tel. No: (632) 890-9329/ 897-6682 loc. 237 Fax No: (632) 897-3080

**Promotions and Public Relations Group
Philippine Economic Zone Authority (PEZA)**

Tel. No: (632) 551- 3438 Fax No: (632) 551- 3436

**Manufacturing and Maritime Business Department
Subic Bay Freeport Zone**

Tel. No: (6347) 252- 4791 / 4632 Fax No: (6347) 252- 4000 / 4004

**Industrial Manufacturing Division
Bureau of Export Trade Promotion (BETP)**

Tel. No: (632) 890-4726 / (632) 890-4638 Fax No: (63 2) 890-4638 / (63 2) 890-4707

Danilo C. Lachica (Chairman)

Ernie B. Santiago (President)

Semiconductor and Electronics Industries in the Philippines, Inc. (SEIPI)

Tel. No: 844- 9028 Fax No: 844- 9037

Victor B. Gruet (Secretary)

Electronics Industries Association of the Philippines, Inc. (EIAPI)

Tel. No: (632) 928-9344 Fax No: (632) 928-7755

Larry Secreto (President)

Philippine Appliance Industry Association (PAIA)

Tel. No: (632) 895-6081 to 89 loc. 271 Fax No: (632) 890-6663

Romeo Q. Yabut (President)

Philippine Electronics and Telecommunications Federation (PETEF)

Tel. No: (632) 813-6398 Fax No: (632) 813-6397

Jefferson T. Plaza (President)

Computer Manufacturers, Distributors and Dealers Association of the Philippines (COMDDAP)

Tel. No: (632) 8103814 / 8927947 Fax No: (632) 8156531

Dr. Joel Joseph S. Marciano

Electrical and Electronics Engineering Institute (EEEI)

Tel. No: 925-2957 Fax No: 925-2958

Mr. Cesar L. Quiazon (Executive Director)

Advanced Research and Competency Development Institute (ARCDI)

Tel. No: 758- 2588 / 7571621