Briefer

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LRC
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Briefer

Pax Silica: Whose minerals for whose peace?

This briefer examines Pax Silica, a U.S.-led multilateral strategic framework established in December 2025 to secure critical technology supply chains. The Philippines' participation, formalized in April 2026, centers on a 1,619-hectare industrial hub at New Clark City in Capas, Tarlac, in Luzon, Philippines, a site that has drawn opposition from environmental organizations and agricultural groups concerned about encroachment on Indigenous territories, the permanent conversion of farmland, and the disruption of hydrological systems upon which farms depend.

In this briefer, Pax Silica is approached not as a single project but as a broader architecture of international and domestic policies aimed at reconfiguring global critical mineral value chains. The briefer situates the hub within that architecture: the FORGE coalition, the Critical Minerals MOU, the Pax Silica Declaration, and Executive Order No. 122. It examines whether the project can deliver the industrial upgrading it promises or whether it will reproduce the enclave model that has kept the Philippines at the low-value end of global supply chains; what ecological and hydrological costs it externalizes onto Central Luzon; and what the absence of transparency, consultation, and enforceable consent reveals about the state's capacity to exercise "full control and supervision" over its resources. It finds significant gaps in transparency, environmental impact assessments, industrial planning, community consent, and sound resource governance. Failure to fill these gaps carries wide-ranging and irreversible consequences for communities, land, water, the economy, and the Philippines' sovereignty over its minerals and resources.



Critical Minerals Ministerial in Washington, D.C.
Photo by U.S. Department of State

Crusade for critical minerals

They have pillaged the world: when the land has nothing left for men who ravage everything, they scour the sea... Neither East nor West can sate their appetite... They plunder, they butcher, they ravish, and call it by the lying name of 'empire.' They make a desert and call it 'peace.'
— Tacitus (Agricola, ch. 30)

Pax Silica is both an international economic initiative based on the Pax Silica Declaration and a proposed AI-native industrial hub in New Clark City. It is important to understand that these are separate initiatives, each imposing wide-ranging pressures on ecological health, Indigenous territories, and national sovereignty. In general discourse, "Pax Silica" may also refer to the broader architecture of alliances and policies that aim to reconfigure global critical minerals supply chains, or possibly establish a new U.S.-led world order based on access to critical minerals.

Pax Silica is defined by the U.S. Department of State as its "flagship effort on 'Super Intelligence (SI)' and supply chain security, advancing a new economic security consensus among allies and trusted partners" (United States Department of State, 2026b). The initiative aims to integrate an international value chain "spanning critical minerals, energy, advanced manufacturing, semiconductors, SI infrastructure, and logistics." Notably, the U.S. now uses the term "Super Intelligence," after promulgating an executive order directing all executive agencies to use the term in place of "Artificial Intelligence" (Executive Order 14434 (U.S.), 2026). The "rebranding" is seen as a reflection of the administration's efforts to bring the U.S. to the forefront of AI development and of its increasing association with the AI industry (The White House, 2026).

More than an ordinary industrial strategy, Pax Silica is part of a broader geo-economic initiative to decouple critical supply chains of the U.S. and allied industrialized states from China and its allies. The Latin term "pax silica" roughly translates to "silica peace," referring to silica, the raw material used to produce silicon—a key element in semiconductor manufacturing (Kumar, 2026).

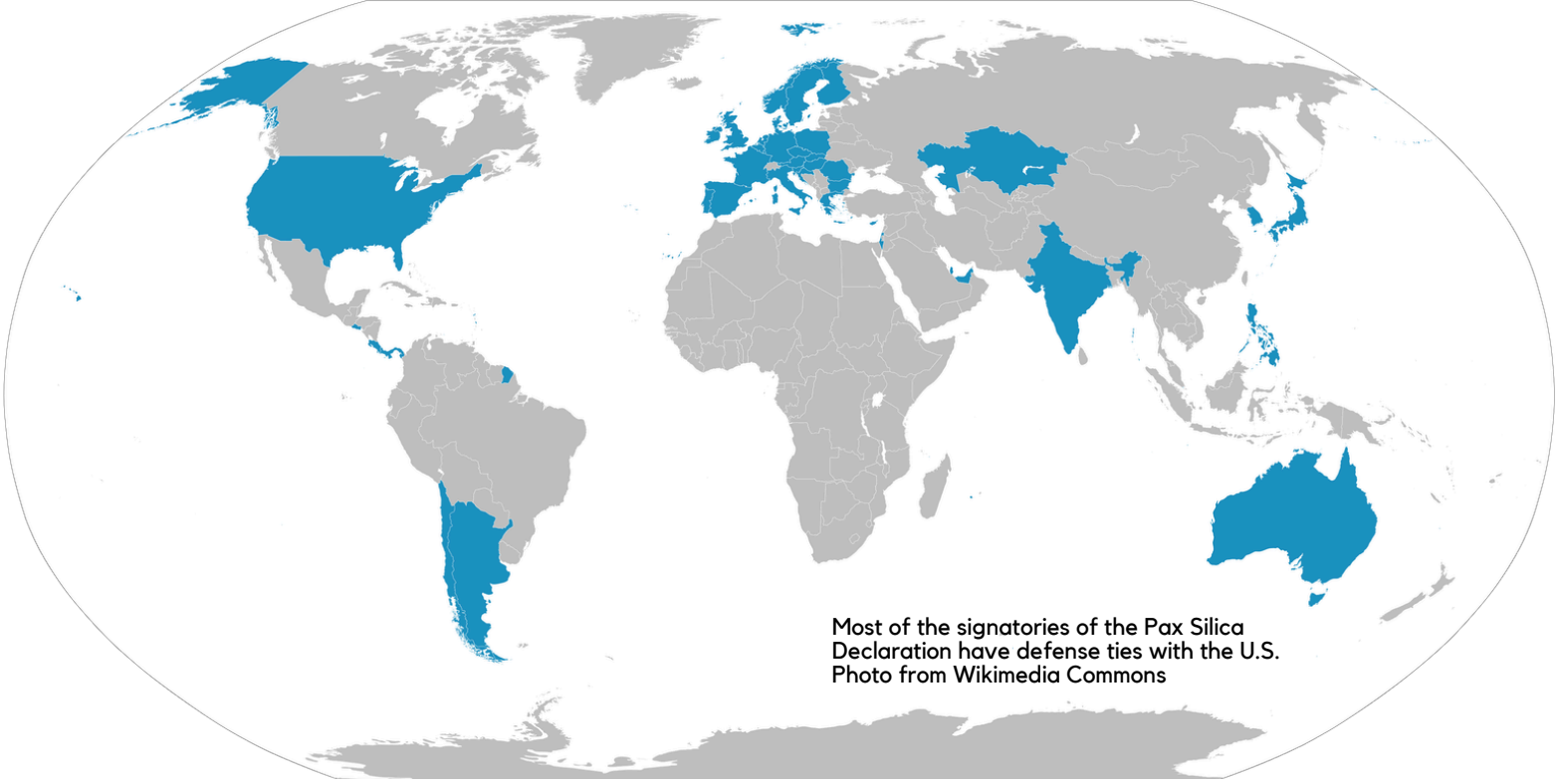
The nomenclature deliberately echoes historical peace-and-stability constructs such as Pax Romana and Pax Americana, signaling an ambition to create a durable economic order for the AI era. Jacob Helberg, U.S. Under Secretary of State for Economic Affairs on AI Supply Chain Security, calls Pax Silica "the new Washington Consensus" (United States Department of State, 2025b).

Analysts often cite China's rise as a driver of "Pax Americana's" supposed decline (Ramdin, 2024), making the U.S.' current initiatives an apparent response. China currently dominates critical mineral supply chains, being the global leader in critical minerals trade and renewable energy technology manufacturing, and a competitor in AI technology. For instance, in terms of annual global totals, China accounts for roughly 70% of rare-earths output and, in refining, 35% of nickel, 50-70% of lithium and cobalt, and nearly 90% of rare earths (International Energy Agency, 2021). It also controls a significant portion of nickel processing in Indonesia, the world's top nickel producer, and historically imported roughly 90% of nickel ore exports from the Philippines, the world's top nickel exporter (International Trade Centre, 2026). China also accounts for 85% of the supply chain production capacity of solar photovoltaics, 80% for lithium-ion batteries, and nearly 100% for certain solar PV components (International Energy Agency, n.d.), while also leading in wind turbine manufacturing (Mackenzie, 2026).

Before the rise of green energy, certain minerals were "critical" due to defense technologies. "Mineral security" was a primary consideration during the Second World War up to the end of the Cold War, embodied by stockpiling strategies, i.e., securing a stable supply of minerals and denying access to adversaries (Baskaran & Dady, 2026). However, the "criticality" of minerals re-entered public consciousness around the early 2010s, first when the European Union launched the Raw Materials Initiative in 2008, a strategy for "raw materials diplomacy" responding to import dependence and China and India's attempts to secure privileged access to raw materials such as copper from Zambia and cobalt from the DRC (European Commission, 2008). At this point, mineral security was driven more by economic interest rather than by geopolitics, a dynamic that reversed, precipitated by the Senkaku Islands dispute. After a collision between a Chinese trawler and Japanese coast guard vessels in the area, China cut off rare earth elements (REE) exports, on which Japan's manufacturing industry heavily relied, supposedly in retaliation (The Japan Times, 2012). Having moved from economic to geopolitical concerns, mineral security discourse today has even developed an environmental aspect due to the introduction of mineral-intensive renewable energy technologies.

Pax Silica belongs to a family of policies and initiatives launched by the U.S. to decouple from China and establish its own mineral supply chains. Among the earliest was the Indo-Pacific Economic Framework for Prosperity (IPEF), an economic initiative launched by the Biden administration on May 23, 2022, to counter China's economic dominance in the Indo-Pacific Region, of which the Philippines was a founding member (Swanson, 2022). Later, in June 2022, the U.S. launched the Minerals Security Partnership (MSP), a "friendshoring" initiative by 17 allied consumer countries and the EU, aiming to reduce their reliance on China. An expanded MSP Forum was launched in 2024, bringing in 15 mineral-producing nations, including Argentina, the DRC, Zambia, the Philippines, and others (European Commission, 2026).

In 2025, the Pax Silica Declaration was signed by seven countries—the U.S., U.K., Japan, South Korea, Singapore, Australia, and Israel—launching a new international coalition, this time focusing on compute, silicon, energy, and minerals, under the leadership of Secretary of State for Economic Affairs Jacob Helberg (United States Department of State, 2025a). Pax Silica is also characterized as a "positive-sum partnership of nations who want to remain competitive and prosperous" (U.S. Embassy in the Philippines, 2026b). The Declaration's core objectives are to (1) reduce coercive dependencies; (2) partner to secure global tech supply chains, address AI supply chain opportunities and vulnerabilities, and explore joint investment; and (3) protect sensitive technologies and build trusted digital infrastructure (United States Department of State, 2026).



Most of the signatories of the Pax Silica Declaration have defense ties with the U.S. Photo from Wikimedia Commons

U.S. Under Secretary of State for Economic Affairs for AI Supply Chain Security Jacob Helberg's statement at a briefing on Pax Silica makes plain the ambitions behind the initiative (United States Department of State, 2025b):

> "If the 20th century ran on oil and steel, the 21st century is going to run on compute and minerals, and so we're aligning our supply chains accordingly... The countries that lead in AI and in technology will have the larger economy and the stronger military."

Meanwhile, consumer countries were forming national laws, strategies, and coalitions to reduce their import dependence. The EU passed the Critical Raw Materials Act, which set targets for self-sufficiency in critical minerals extraction and processing (European Commission, n.d.). Likewise, the U.S. Department of Energy launched the Mine of the Future Initiative, committing millions of dollars to mining technology innovation to drive domestic mining ventures (Hydrocarbons and Geothermal Energy Office, 2025), as well as Project Vault, a public-private initiative to establish a critical minerals stockpile, echoing its past wartime policies (Export-Import Bank of the United States, 2026). This aligns with its prohibition on procuring certain materials mined and refined from China, Russia, North Korea, and Iran through the 2026 National Defense Authorization Act (10 U.S. Code § 4872 - Acquisition of Sensitive Materials from Non-Allied Foreign Nations, n.d.). A series of international initiatives has also been formed among industrialized consumer countries, such as Australia, India, and Japan, including the Quad Critical Minerals Initiative, the G7's Critical Minerals Action Plan, and the OECD's Critical Minerals Initiative.

Finally, on February 4, 2026, during the inaugural Critical Minerals Ministerial in Washington, D.C., attended by delegates from 54 other nations, the Forum on Resource Geostrategic Engagement (FORGE) succeeded the MSP. Aside from further expanding the coalition's reach into the Global South, FORGE elevated cooperation efforts from mere project collaboration to policy alignment, aiming to counter non-market practices and build common standards to ensure supply chain stability (United States Department of State, 2026a). Thus, during the Ministerial, 11 bilateral critical minerals frameworks and memoranda of understanding (MOUs) were signed by the U.S., one of which was the Critical Minerals MOU signed by the Philippines. The MOU is a non-binding agreement providing that the U.S. and the Philippines commit to intensifying cooperation to secure both parties' critical mineral and rare earth supply chains through joint investment facilitation, streamlined permitting, and preferential pricing mechanisms, notably a "first look" clause for the United States

(Philippines-U.S. Memorandum of Understanding on Critical Minerals, 2026, Section 1, Paragraph 2[e]). A non-binding first-look clause still signals political priority and can shape investor expectations even without legal enforceability.

Soon after signing the Critical Minerals MOU, the Philippines formally joined the Pax Silica initiative on April 16, 2026, as the 13th signatory (U.S. Embassy in the Philippines, 2026b). The signed Pax Silica Declaration recognizes AI as a transformative force for prosperity and serves as a commitment of the Philippines and the U.S. to cooperate on investment security, infrastructure, and incentives to build a secure AI supply chain spanning technological hardware, minerals, and energy. The U.S. Department of State (2026c) intends to propose to Congress the Pax Silica Fund, a $250 million foreign assistance fund to support critical minerals extraction, processing, critical infrastructure, and manufacturing assets.

Following the Pax Silica Declaration, the United States and the Philippines announced the eponymous Pax Silica project—a plan to establish a 4,000-acre (approximately 1,619-hectare) industrial hub in New Clark City. Marcos Jr. described the hub as an "advanced manufacturing and logistics center in global AI and technology" (Gonzales, 2026a). In August 2026, Marcos Jr. promulgated Executive Order No. 122, which established a national framework for revitalizing mining and developing the country's critical minerals industry (Executive Order No. 122, 2026). As of November 2026, the Pax Silica initiative has 26 signatories, including the U.S. (United States Department of State, 2026b; Kertai, 2026):

- Founding signatories: Australia, Finland, India, Israel, Japan, Norway, the Philippines, Qatar, the Republic of Korea, Singapore, Sweden, the United Arab Emirates, the United Kingdom, and the United States
- Subsequent signatories: Germany, Argentina, Chile, Costa Rica, Greece, Kazakhstan, Panama, the Netherlands, El Salvador, the European Union, Italy, and Paraguay
- Non-signatory participant: Taiwan, which has endorsed the Pax Silica Declaration principles via the Joint Statement on the Pax Silica Declaration and U.S.-Taiwan Economic Security Cooperation

Two clarifications follow from this overview. First, the "Pax Silica" criticized and praised in public discourse is more than just the hub in Capas, Tarlac, and even broader than the Pax Silica Declaration signed in April 2026—it is the totality of U.S.-led initiatives to create a new raw material supply chain. It is also the minerals framework that the Philippines is committing to, including domestic programs and policies it has made in response to U.S. initiatives. Confronting Pax Silica requires interrogating Philippine participation in FORGE and the Critical Minerals MOU, as well as Executive Order No. 122. It should raise questions about Philippine independence in foreign policy and sovereignty over minerals and industrial policy.

Second, Pax Silica is not a static framework, but a continuing and evolving strategic effort to secure economic advantages for the United States and its allies by restructuring global technology supply chains to reduce dependence on China and other non-allied states. China and its allied blocs like BRICS will respond and attempt to reclaim what advantages they might lose. Meanwhile, "third nations" key to the critical minerals scramble are faced with the choice of whether to decouple, hedge bets, or chart a "third way." Regardless, this search for "peace," manifestly a crusade for minerals, will further give rise to newer allegiances, tensions, and ambitions, inevitably creating new sites of struggle.

Components of "Pax Silica"

"Pax Silica" has been used to refer to several instruments aimed at intensifying mining and mineral processing in the Philippines, as well as establishing other advanced manufacturing hubs, to secure inputs for the U.S. supply chain for critical minerals and artificial intelligence and achieve economic development for the Philippines. Broadly, its components include the Critical Minerals MOU, the Pax Silica Declaration, the Clark Advanced Manufacturing Park, and Executive Order No. 122.

	Signing date	Objective	Mechanisms
Philippines-U.S. Memorandum of Understanding on Critical Minerals	February 4, 2026	Intensify cooperation to secure the supply of **critical minerals** and rare earths of the U.S. and the Philippines for the production of advanced technologies, industrial activities, digital transformation and infrastructure development.	• Cooperation in investments: Joint project selection and support. The U.S. has a "first look" at investments in critical mineral assets sold in the Philippines. • "Accelerate, streamline, deregulate permitting timelines and processes." • Preferential trade and diplomatic tools to "review and deter" asset sales on "national security grounds." • Non-binding but policy-determining.
Pax Silica Declaration	April 16, 2026	Deepen the economic partnership between the U.S. and the Philippines for the **AI supply chain**—software applications and platforms, information connectivity and network infrastructure, semiconductors, advanced manufacturing, transportation logistics, minerals refining and processing, and energy.	• Investment facilitation: Mobilize finance and investments. • Trade policy: Reduce dependencies and create new supply chains. • Economic and national security cooperation to prevent non-market practices and ensure investment security. • Non-binding but policy-determining.
Clark Advanced Manufacturing Park (Pax Silica hub)	Offer made on April 9, 2026. Announced on April 16, 2026. Awaiting U.S. response to draft framework.	"**Surge production for inputs** vital to U.S. supply chains" by building an AI-native industrial and manufacturing hub in a 1,619-ha area inside New Clark City to be leased by foreign investors.	• To be determined by binding framework agreement under negotiation. • To be determined by potential domestic legislation (House Bill No. 11758).
Executive Order No. 122	August 18, 2026	Establish an integrated national policy framework for the critical minerals industry to **encourage mining and critical mineral processing** to foster industrialization and improve the country's position in the global critical minerals and green technology value chain.	• Establish a national exploration and mineral reservation program to take stock of critical minerals. • Revitalize mining by canceling non-operational tenements and accelerating privatization of public mining assets. • Promote critical mineral processing investments with market incentives and public-private partnerships.



Artist's conceptual rendition of Pax Silica, presented by the Bases Conversion and Development Authority during a Malacañang press briefing, July 23, 2026. Photo by Philippine Star

Clark Advanced Manufacturing Park (CAMP): Only the beginning

The Pax Silica hub is a planned 4,000-acre (1,619-hectare) "AI-native industrial acceleration hub" that was "offered by the Philippines as an Economic Security Zone, to surge production for inputs vital to U.S. supply chains" (U.S. Embassy in the Philippines, 2026b). It was originally proposed as the "Pax Silica Coordination Office," a bilateral coordination facility between the Philippines and the U.S. for critical mineral supply chain security and industrial planning (B. M. D. Cruz, 2026a). Later, the Bases Conversion and Development Authority (BCDA) started referring to the project as the "Clark Advanced Manufacturing Park" or CAMP to distinguish it from the Pax Silica Declaration (Bases Conversion and Development Authority, 2026a). Hereafter, CAMP will be used to refer to the Pax Silica hub for clarity.

CAMP is the Philippines' centerpiece project under the Pax Silica initiative. The BCDA offered the parcel of land to the U.S. Department of State under a two-year rent-free lease in a letter dated April 9, 2026, days before the signing of the Pax Silica Declaration and the acceptance of the offer by the U.S. Department of State (Board of Investments, 2026). CAMP is located within the 9,450-ha New Clark City metropolis project, a component of the 35,300-ha Clark Freeport and Special Economic Zone (Clark). Under Republic Act (R.A.) No. 7227 (1992), Clark is a collection of former U.S. military reservations that the BCDA, a government agency, converted into a freeport and special economic zone.

The BCDA brands CAMP as the "golden node" of the Luzon Economic Corridor infrastructure and development initiative among the U.S., Japan, and the Philippines, linking Subic, Clark, Manila, and Batangas (U.S. Embassy in the Philippines, 2026c). The Philippine Department of Trade and Industry (DTI) and Board of Investments (BOI) are also lead agencies driving the Philippines' participation under the broader Pax Silica initiative. Under the recently promulgated Executive Order No. 122 (2026), the DTI-BOI is mandated to promote mineral processing investments.

The planned development is positioned as a technology-focused economic hub anchored on manufacturing hardware for AI infrastructure, particularly semiconductors and other electronics, as well as mineral processing. Domestically, the hub is seen as an opportunity to bring the Philippines' semiconductor and mining sectors toward higher-value activities and to enter the emerging AI industry (Leon, 2026). In a Senate environment committee hearing, DTI Undersecretary Rodolfo stated that mineral processing plants are a medium- to long-term prospect for the project (Manila Bulletin, 2026), which industry actors like the Chamber of Mines of the Philippines (COMP) welcome (Zapanta, 2026a).

BCDA states that critical mineral inputs may be sourced from other areas such as the Visayas and Mindanao (Gonzales, 2026b). The DTI also envisions CAMP as a node in its planned Super Intelligence, Knowledge, and Advanced Technology (SIKAT) corridor, spanning mineral processing in Mindanao to infrastructure projects in Aurora (B. M. D. Cruz, 2026c). While the BCDA and DTI initially disclosed that two data center operators were interested in locating in the hub (Presidential News Desk, 2026), both agencies later ruled out data centers after public concern over their potential water and energy resource impacts. Nonetheless, they do not rule out the possibility of data center projects in locations outside the hub (Gulla, 2026).

Mounting opposition, lack of transparency

The administration is strongly pushing for CAMP, with the signing of the framework agreement targeted by the end of 2026. The plan was featured in the 2026 State of the Nation Address (SONA) as part of a nationwide push for foreign investment-driven ecozones (Office of the President, 2026). The President frames it as an essential opportunity to kick-start the domestic processing of critical minerals such as nickel to capture more value, while Finance Secretary Frederick Go is urging businesses to see the project's potential to build a "generational" industrial ecosystem (Dagooc, 2026).

However, the project continues to face intense scrutiny due to a wide range of issues—its impacts on Aeta and farmer communities in Capas and neighboring areas, water and energy consumption, and its implications for sovereignty over industrial planning and resource governance. Thousands of Filipinos have gone to protest and signed petitions to resist the project, with the voices of the Aeta Indigenous community at the forefront.

To the public, the project appears rushed. The government has hinted at the possibility of signing the binding agreement during U.S. President Trump's visit to Manila for the ASEAN Summit, which the U.S. Department of State flatly denied, with the DTI reiterating its end-of-2026 target (Payo, 2026; Zapanta, 2026d). Facing mounting public opposition, an ASEAN official asked protestors to "respect our visitors" for the ASEAN Summit and hold off on staging protests (Payo, 2026). During Trump's meeting with President Marcos, Jr. at the Malacañang Palace, U.S. Ambassador to the Philippines Lee Lipton told the media that "there is no signing," with Marcos adding that they are "not covering [Pax Silica] on this trip" (Associated Press, 2026).

Given the lack of transparency and clear signals from BCDA and DTI, this much opposition and speculation should be no surprise. Only a handful of primary documents were made publicly available —the Pax Silica Declaration, the Joint Statement on the AI Opportunity Partnership, and the proposal and acceptance letter for the two-year rent-free lease (Board of Investments, 2026). The broader Critical Minerals MOU was only made public by a group of progressive legislators after a request from the Department of Foreign Affairs (BusinessMirror, 2026).

CAMP is currently the subject of pending domestic legislation. On October 26, 2026, House Bill No. 11758 (2026) was filed in the House of Representatives by lawmakers of the National Unity Party, establishing CAMP as an "Advanced Industries Zone" with "free zone" status, giving locators substantial exceptions to taxes and duties other than those provided by existing revenue laws (Section 8[c]). Unlike the BCDA and DTI's statements, the bill does not rule out data centers among qualified enterprises. It also creates the Advanced Industries Development Authority (AIDA) as an

independent government instrumentality to administer, develop, promote, and formulate rules for the Zone, replacing the BCDA's authority in the area. The envisioned AIDA is composed of a Chairperson appointed by the President; the Secretaries of Finance, Trade and Industry, and Information and Communications Technology; the BCDA President; three independent governors from fields such as semiconductor manufacturing, science and engineering, and technology commercialization, etc.; one representative from the labor sector; and even two representatives from the locators themselves.

AIDA, in sum, is given broad powers (Section 8[a]) but has no public disclosure requirement for these, including for the contracts the body enters into (Section 8[h]), incentive agreements, or its exercise of the right of eminent domain (Section 8[f]), save for the Authority's own compensation system to be published (Section 11)—this transparency is about AIDA's own spending, not its deals. The bill acknowledges the right of Indigenous Peoples to Free, Prior, and Informed Consent (FPIC) but places it on a parallel track rather than a prior one, exempting Indigenous consensus-building from deadlines while the project's land classification, utility franchise, and infrastructure commitments proceed on a 20-working-day priority track (Section 16). In other words, they are sequenced alongside, not before, the project, revealing acceleration as its purpose. The bill expressly states that "the Zone remains fully under Philippine law and jurisdiction, and no immunity is granted to any person" (explanatory note); it nonetheless paves the way for structural dependence without formalizing obligations. Arguably, the bill makes the dependence statutory. In other words, while it does not cede sovereignty, it virtually insulates an investment-centered authority from domestic democratic correction, making for a more durable form of policy constraint.

According to Ambassador to the U.S. Jose Romualdez, the bill was "submitted by the Executive Secretary" before submission to Congress (Bilyonaryo News Channel, 2026). The bill contains several more provisions that do not bode well for environmental regulations and industrial policy and that demonstrate what expectations its proponents may have, which are also discussed in the latter sections.

Meanwhile, the project lacks a formal, finalized plan and a public consultation process. After announcing that the project will demand up to 5,000 MW of energy and 120 million liters per day (MLD) of water, the BCDA and other agencies such as the Department of Environment and Natural Resources (DENR)-Environmental Management Bureau (EMB) and the Department of Energy (DOE) revealed that there are no concrete plans for how this demand will be met (Manila Bulletin, 2026; Yu, 2026). According to BCDA, a general Environmental Compliance Certificate (ECC) for the zone has been issued, while all component projects and locators must still secure their own ECCs (Reyes, 2026). Neither the ECC nor the Environmental Impact Statement (EIS) for the zone has been released to the public. A Senate committee hearing in August also revealed that an NCIP census of Indigenous communities was still ongoing, and that local government officials were not consulted. The public still lacks access to the full extent of the Philippine government's obligations and liabilities (Science Communicators Philippines, 2026).

Worse, planning would be led by investors, not by the government. In the same Senate committee hearing, then-BCDA CEO Joshua Bingcang stated that the planning and construction of energy, water, and road infrastructure would be up to the proposals of expected locators, who are expected to submit a detailed development plan "within six months" (Manila Bulletin, 2026). The BCDA and DTI both declined to disclose precisely who these investors were. H.B. No. 11758 (2026) also allows the AIDA to designate a corporation to be the master developer of the Zone, allowing it to plan, develop, and operate the property (Sec. 8[d]; Sec. 22). This transfer of management to the private sector further shrinks the space for public participation and consultation.

The language of the Philippines' agreements with the U.S. also does not bode well for transparency and public participation. The Critical Minerals MOU has a confidentiality clause for all intellectual property and data generated under cooperative engagements (Philippines-U.S. Memorandum of Understanding on Critical Minerals, 2026). The U.S. State Department's desire for "legal safeguards for investors" could be interpreted as a push for similar confidentiality (Rosete, 2026).



Without defined terms, government proponents cannot ensure the safety and equity of the project—nor can they secure the consent of affected Indigenous Peoples, local government units (LGUs), and other stakeholders whose safety and equitable treatment depend on those terms being fixed in advance. While negotiation with the U.S. government and foreign firms is adamantly pursued, consultation and transparency with the concerned public are consistently denied and brushed aside. Rather than addressing the lack of transparency and responding to people's concerns, the government has dispersed hundreds and arrested hundreds in mass protests against Pax Silica and told them to "write position papers" instead (Domingo, 2026; Sigales, 2026a, 2026b). During the 49th meeting of the Association of Southeast Asian Nations (ASEAN), attended by the U.S., opposition to Pax Silica led to the arrest of approximately 300 protesters in a single day (J. P. Cruz, 2026). Pax Silica is testing the extent to which the government can respect its commitments to transparency and responsible investing, and the results have been dismal.



Value-addition or new enclave economies?

Electronics factory
Photo by Steve Jurvetson, CC BY 2.0, via Wikimedia Commons

The Philippines has a long history of relying on foreign investment and "economic zones"—a strategy that has created isolated bubbles of economic activity, such as the semiconductor assembly, testing, and packaging industry, with little spillover, keeping the country at the lower-value segments of the supply chain (Aldaba & Aldaba, 2010). Thus far, there are no signs that Pax Silica will depart from the ecozone model, risking the further solidification of our current position in global value chains.

An "enclave economy" is an economic system where foreign-owned businesses operate in a dedicated zone that is largely isolated from the host country's broader economy. Instead of integrating and helping to build local industries, these enclaves function as economic "islands" (Cling & Letilly, 2001). The foreign companies in an enclave are primarily engaged in what is often called a "screwdriver operation"—mostly importing parts and materials, and using local labor only for final assembly or simple processing before exporting the finished products (Moran, 2006). Meanwhile, foreign capital tends to control design, intellectual property, and strategic decisions. Put differently, the captive value-chain relationships it generates are only "process upgrading," that is, doing the same assembly tasks more efficiently, and rarely generating "functional upgrading" for design, research and development, or supply coordination (Balaoing-Pelkmans, 2026). The BCDA's projections measure the former while the public debate assumes the latter. Thus, despite the semiconductor industry's presence in the Philippines for more than 50 years, it has not translated into the widespread economic prosperity seen in newly industrialized countries like South Korea (Balaoing-Pelkmans, 2026). Development economists have described this phenomenon as "arrested growth," where participation in global production networks has been limited to these enclaves (Athukorala, 2022).

The Philippines has more than 400 operating special economic zones (Presidential Broadcast Service—Bureau of Broadcast Services, 2025). What seems to make CAMP and Pax Silica special in their marketing is the idea that they will spur value-chain upgrading for two industries that have long been stuck in the lower rungs of the value chain—semiconductor manufacturing and mining.

Much of the perceived support for the venture stems from the general public's longstanding frustration with the Philippines' "premature deindustrialization." Pax Silica may be the country's "second chance" for industrialization, some experts say (Stratbase Institute, 2026; Villegas, 2026).

According to the BCDA, the industrial acceleration hub is expected to contribute $200 billion in exports, 130,000-190,000 direct jobs, another 500,000-800,000 indirect and induced jobs, and P68 billion to P75 billion in annual tax revenues. BCDA estimates the project will require an initial investment of about $10 billion, with total investments for full buildout estimated at $40 billion to $70 billion (Presidential News Desk, 2026). BCDA also reported that more than 30 companies have expressed interest in investing in CAMP, including those engaged in manufacturing, technology, and energy (Romero, 2026). Development is set to begin in three to five years, with full operations expected in 30 years (Villanueva, 2026b).

At this stage, these benefits are mere forecasts and are largely speculative, with baselines, calculations, and assumptions unavailable for scrutiny. The government also has yet to finalize or publicly disclose any legally binding agreements, confirmed investors, or the exact details of fiscal incentives being offered. The BCDA has also recently replaced CEO Joshua Bingcang, who had been with the agency for 30 years (Bases Conversion and Development Authority, 2026b). He was replaced by Ariel Nepomuceno, a former Customs Commissioner and administrator of the Office of Civil Defense under the Department of National Defense (Pinlac, 2022). Nepomuceno, a newcomer to the BCDA, will need to pin down and re-evaluate earlier promises made by the agency, while his background in defense signals a shift toward security and defense considerations in the BCDA's agenda.

Illusory promises of industrial upgrading and job generation

A core critique from economic analysts is that Pax Silica may simply "rename the old arrangement" rather than fundamentally alter the Philippines' position in global technology supply chains (Punongbayan, 2026). The fundamental issue is that countries that design semiconductors and own patents capture most of the value, while countries like the Philippines that assemble components or extract minerals receive "meager pickings." A regularly cited cautionary example is Intel, which opened a plant in Cavite in 1997 before shutting down in 2009 without developing domestic capabilities for advanced chip manufacturing (Gonzales, 2026a). Currently, the BCDA's "wish list" of investors includes tech giants like Apple, Nvidia, Taiwan Semiconductor Manufacturing Co., and MediaTek (Zapanta, 2026c).

Unfortunately, Pax Silica does not differ much structurally from the traditional special economic zone (SEZ) enclaves. Aside from already being built inside the Clark SEZ, H.B. No. 11758 (2026) deepens CAMP's enclave character through additional incentives, a separate customs territory, and the effective transfer of development planning to the private sector. Section 22 of the bill allows the management of the Zone or its portions to be transferred to a private entity as a "Master Developer and Estate Operator" through a master development lease. The Master Developer has the right to develop, manage, operate, plan, sublease, collect revenue, and engage contractors to carry out a Master Development Plan. Locators are also allowed to lease land for up to ninety-nine years, except in areas reserved for public use, where the renewable twenty-five-year contract duration applies.

Worse, given that the U.S.'s aim is "friendshoring" (U.S. Department of the Treasury, 2025) and that planning for site development will be based on proposals by investors, according to the BCDA (Manila Bulletin, 2026), the industries to be established would likely be determined according to what suits the U.S.'s economic security rather than the Philippines' industrial upgrading. In Section 1.2 of the Critical Minerals MOU (not publicly available), the U.S. and the Philippines jointly identify projects of interest to address gaps in priority supply chains, and the U.S. has "the first opportunity to invest" in critical mineral assets (Philippines-U.S. Memorandum of Understanding on Critical Minerals, 2026). Section 1.2.e provides that "investment projects should include provisions for technology"; however, the absence of the explicit term "shall" renders the provision weak and non-binding.

Notably, the discourse of the BCDA and DTI in public pronouncements, such as at Senate hearings, demonstrates that the aim is to attract foreign investors to plan, finance, and operate not just businesses, but also basic infrastructure such as roads, energy, and water. For instance, energy sources are being studied with Saudi firm ACWA Power for solar, American firms for LNG, and Korean and Japanese companies for other power-generation options.

To contribute to value-retention and industrialization, investment facilitation must consider the current capacity and potential of the Philippine manufacturing sector and labor force, and any agreement should include legally enforceable provisions on technology transfer, local supplier development, and local hiring and training requirements. These should be guided by measurable targets with consequences for non-compliance. Without these, Pax Silica could replicate the country's experience with SEZs and that of the Intel plant in Cavite. Even the proposed law (House Bill No. 11758, 2026) establishing CAMP as an Advanced Industries Zone only requires a "Technology Transfer and Training Plan" under Section 25(e) and continued compliance with said commitments under Section 30. These are mere certification and reporting obligations that lack enforceable targets, requiring only a menu of outcomes: technology transfer, conduct of research and development (R&D) in the Philippines, "*or*" development of Filipino suppliers. Section 27 also provides 100% tax deductions for R&D and training, effectively making the state subsidize the supposed technology transfer. These obligations are also weakened by the conditions that they shall be "without prejudice to intellectual property rights" and "subject to the protection of sensitive technologies."

If not industrial upgrading, proponents promise at least job creation. The BCDA projects that CAMP could generate up to 190,000 direct jobs and another 500,000 to 800,000 indirect and induced jobs (Presidential News Desk, 2026). Without an explanation for the estimates, it is difficult to evaluate the claim. The figure does not distinguish among job types or quality—for example, how many are temporary construction jobs. Questioned on the quality of employment the hub will generate, DTI Undersecretary Rodolfo said that top management positions would likely be occupied by foreigners before Filipinos take over in time (Manila Bulletin, 2026).

Boosting local employment will require deliberate skilling programs for the local workforce. Notably, the Clark SEZ's effect on local employment has been minimal—showing little upgrading of local labor skills and hiring many of its workers outside Central Luzon (Tadem, 2022). Even without CAMP, Aeta communities are familiar with the tendency of companies in Clark to hire foreign nationals or high-skilled migrants rather than locals. Moreover, the proposed industries in Pax Silica—mineral processing, advanced semiconductor manufacturing, and initially, data centers—are notoriously capital- and resource-hungry but not labor-intensive, and tend to have no effect on wages while increasing home prices (Bahar & Wright, 2026). For instance, a Meta data center in Indiana is expected to employ roughly one job per $33 million invested (Staley, 2026).

Furthermore, while President Marcos Jr. announced tax relief measures for the project in his 2026 SONA, the fiscal impact of these exemptions remains unknown. The CREATE law offers an income tax holiday (ITH), or a tax exemption for four to seven years; a special corporate income tax where export enterprises can opt to pay a reduced 5% tax on gross income after the ITH period; and duty exemptions on equipment and materials and VAT exemptions on local purchases and imports (PwC, 2026). The CREATE MORE Act further lowers the corporate income tax and allows remote work. It is projected that the laws will result in a loss of P5.9 billion in revenue, although the government sees this as temporary pain for long-term gain (Alberto, 2024). For Pax Silica, it remains to be seen whether these incentives eventually pay off through a transformed industry landscape. Without a comprehensive national industrialization plan focused on building domestic capability, CAMP stands to be yet another enclave, locating economic activity in the Philippines but ultimately serving foreign partners.

Racing to the bottom

The rhetoric of missing out on the investment opportunity has also been used to justify the rush to build CAMP. Ambassador to the United States Jose Romualdez, for instance, has warned that the Philippines risks losing the investment to its neighbors Vietnam, Malaysia, or Indonesia (Dumalag, 2026). The claim cannot be conclusively verified, but the available information on the industrial and foreign policies of these nations indicates that there might not be any competition at all.

First, no other Southeast Asian country other than the Philippines has expressly sided with the U.S. in this scramble for critical minerals. The Philippines was the only Southeast Asian member of the MSP Forum and the only signatory to the Pax Silica Declaration other than Singapore, which is known as a "resource-poor" economy (Yusuf, 2020). The other raw-material-exporting members of Pax Silica are Argentina and Chile, which offer completely different geographical and resource advantages.

While Indonesia, Malaysia, and Vietnam have corresponding non-binding critical minerals MOUs with the U.S. (Agreement on Reciprocal Trade in the case of Indonesia), they have exhibited resource nationalist tendencies and passed policies that cut down raw material exports. Indonesia has reasserted that it will still not export raw nickel despite the trade agreement (Bazlina, 2025); Malaysia has previously banned rare earth exports and now has conditional export rules (Azhar, 2026); and Vietnam has also banned rare earth exports that are not "deep-processed" products (Dao, 2026)—all while rolling out industrial policy to encourage value-addition. If not resource nationalist, these are at least indicators of attempts to hedge and maintain trade relations with China (Guarascio & Guarascio, 2026).

Second, the Philippines occupies a unique position in geopolitics, belonging to the so-called First Island Chain separating China from the Western Pacific. Besides Thailand, it is also the only country in Southeast Asia with a formal defense treaty with the U.S., a key consideration for supply chain security. It has also maintained deep cultural and political ties owing to its colonial and postcolonial history with the U.S. On the other hand, Indonesia is a member of the China-led economic bloc BRICS, while Malaysia, which applied for full membership, and Vietnam are both partner countries (BRICS, 2026). A regional survey also reported that decision-makers in Indonesia and Malaysia more strongly align with China than the U.S. (Lin et al., 2026).

Based on the history behind Pax Silica, these two reasons: an uncontested supply of minerals and geopolitical advantages are the most important considerations for the U.S. Without the Philippines' two assets, the three other countries become better destinations—they have cheaper electricity, established manufacturing industries, and a pool of skilled labor. The BCDA expects investors to build their own roads, water, and energy infrastructure (Desiderio, 2026), so the Philippines does not offer much aside from its two assets. While it possesses the leverage, it apparently refuses to negotiate better terms, still waiting on the U.S. to respond to its draft agreement (Cabalza, 2026).



A landscape in Santa Lucia, Capas, Tarlac
Sindre Helvik, CC BY 3.0, via Wikimedia Commons

Pax Silica's ecological footprint

CAMP's strategic calculus looks even worse when its environmental impacts are considered. While the BCDA has obtained an ECC for New Clark City, the DENR has not received any application or information about CAMP (Salcedo, 2026). This is especially worrying given that BCDA itself has revealed plans to harvest 120 to 300 million liters of water per day (MLD) to meet its 65–90 MLD water requirement, as well as an energy demand of 3,000–5,000 MW (Presidential News Desk, 2026).

These water and energy requirements caught the general public and even government officials off guard. No assessments have been made of its impacts on water resources and the grid (Salcedo, 2026; Yu, 2026). Even Bangko Sentral ng Pilipinas (BSP) Deputy Governor Capule noted that plans to relocate the BSP Security Plant Complex would have to be reviewed given such risks (Rosal, 2026).

Currently, there is little information on how the BCDA will manage these environmental risks beyond compliance with the Environmental Impact Assessment (EIA) system. The BCDA will leave infrastructure planning up to interested locators, "subject to regulatory approvals," according to then-BCDA President Bingcang (Manila Bulletin, 2026).

On November 20, Ambassador to the U.S. Romualdez stated in an interview that he welcomed the proposal of H.B. No. 11758 (2026) establishing CAMP by law as a way to resolve issues concerning energy, water, and the displacement of Indigenous Peoples (True FM, 2026). The present bill, however, lacks any provision addressing these concerns. In fact, it effectively insulates CAMP not only from the customs regime but also from certain state regulations. CAMP is designated as a "Decentralized Advanced Industries Zone," which is "self-reliant" and operates "with minimum government intervention." In this arrangement, it takes over aspects of environmental regulation normally exercised by the DENR and the National Water Resources Board—Section 8(i) gives AIDA regulatory jurisdiction over solid, liquid, and hazardous waste, while Section 8(l) gives it the power to exercise "exclusive control and jurisdiction" over the issuance, enforcement, and monitoring of environmental compliance certificates, tree-cutting permits, and water permits within the Zone. Clearly, this creates a conflict of interest that risks the erosion of regulations in the name of streamlining. AIDA is also given fiscal autonomy under Section 11, which is a status given only by the Constitution to bodies like the Judiciary and constitutional commissions.

No water budget

The global expansion of AI is fundamentally a "story about water," and digital infrastructure is a network of physical facilities with a very material thirst (Liang, 2026). That data centers consume significant amounts of water, resulting in local water scarcity (Duan et al., 2025), is well-known, but with or without data centers, CAMP poses a threat to local water systems. BCDA has reiterated the 65–90 MLD figure even after claiming that no data centers will be built. Both the semiconductor industry and mineral processing require vast amounts of water, with an average chip manufacturing facility consuming 53–61 MLD of water per day (James, 2024), while a typical nickel HPAL processing plant can consume around 21 MLD (Lengkey, 2026). Given these figures, 90 MLD seems like a very conservative estimate.

Responding to concerns over draining water tables and competing with local water use, the BCDA has proposed harvesting water from rainwater, nearby rivers, and even the sea. In particular, the targeted rivers are the Bangut River, the nearest, which can provide 130-200 million liters per day (MLD), the O'Donnell River, and the Abacan River (Chi, 2026). Notably, this solution does not address the potential for local water resource conflicts. Both groundwater resources used by local communities and surface water used for irrigation are recharged and replenished by rainwater that collects in these rivers. Alternatively, BCDA has also floated the idea of harvesting seawater at the proposal of a Saudi-based company, which will entail roughly 70 kilometers of pipes traversing the Subic–Clark–Tarlac Expressway (SCTEX) from the hub to the sea (Manila Bulletin, 2026). Maynilad Water Services Inc. and state-owned Korea Water Resources Corp. (K-Water) have already won a bid to build a 150 MLD water infrastructure project (Zapanta, 2026b).

Numerous assessments have shown that Central Luzon's existing water supply is already under pressure. A 2021 National Economic and Development Authority (NEDA) study found that Region 3 was already facing water scarcity with 708 cubic meters of water available per person per year—below the 1,000 m^3 water-scarcity threshold and approaching the 500 m^3 absolute-scarcity line (NEDA, 2021). The assessment uses the Falkenmark water stress indicator based on per capita availability, and does not factor in Central Luzon's water resource demands as the country's leader in agricultural production.

Central Luzon is also subject to periodic drought. BCDA stated that the assessment of the Bangut River's potential supply was done during the dry season, but without publication, there is no way to evaluate the claim. Water supply levels are also affected by increasingly unpredictable weather events. For instance, the country is facing the strongest episode of El Niño since 1950, which is expected to reduce rainfall by up to 60% (Mendoza, 2026c). These weather patterns will impact reservoir supply for household use and irrigation, especially when industrial use is prioritized. Establishing water storage and harvesting facilities will cause de facto corporate control of local water resources, which can conflict with existing water-use arrangements between irrigators and government agencies. During droughts, households and farmers could face rationing while industrial operations continue to require large water allocations. Fearing this exact scenario, residents in Oton, Iloilo strongly opposed a proposal by a Norwegian company to build a 10-hectare hyperscale AI data center, ultimately forcing the company to withdraw (Villa et al., 2026).

Water pollution is also an issue. Both semiconductor manufacturing and minerals processing produce wastewater containing heavy metals, solvents, and toxic chemicals, creating the risk of aquifer contamination that could threaten access to potable water (Lakshman, 2024; Sandhu et al., 2025). In Rio Tuba, Palawan, unsafe levels of hexavalent chromium were detected in local waterways surrounding the Japanese-owned Coral Bay Nickel Corp.'s HPAL nickel processing plants (Lehren et al., 2021). For CAMP, a DENR Environmental Management Bureau director has stated that "ideally," water treatment facilities would be established, but there are no concrete plans for dealing with what the industrial hub could introduce (Manila Bulletin, 2026).



A solar farm in San Marcelino, Zambales
Raffy Tima/San Marcelino Public Information Office

Derailing the just energy transition

The energy requirement for Pax Silica is equally concerning. BCDA estimates a power demand of 1 GW by 2036 and 3–5 GW by 2052 at full development (Manila Bulletin, 2026). Five gigawatts represents 24% of the Luzon grid or 18% of the combined installed generating capacity of Luzon, Visayas, and Mindanao for 2026 (Esmael, 2026).

DOE Secretary Garin has stated that it would be "too dangerous" to integrate the hub into the main Luzon power grid, which is already experiencing power supply shortages, frequent yellow and red alerts, and aging power infrastructure (Villanueva, 2026a). The Secretary further raised concerns over the destabilization of the grid that would stand to impact households and other businesses (Yu, 2026). That the 3 GW projection is equivalent to the output of three large coal plants or one nuclear facility (Mendoza, 2026a) underpins concerns about dirty and hazardous energy sources for the CAMP.

The DOE is exploring possibilities with foreign and domestic energy companies, with nuclear energy as an option. The BCDA's energy rhetoric presents an energy mix of solar, battery storage, liquefied natural gas (LNG), and waste-to-energy (WTE); an independent assessment found that a mix of solar and LNG would be optimal (Mendoza, 2026b). All of these energy sources carry their own environmental and community risks.

Currently, only 500 MW has been pledged to fill the gap. The subsidiary of Saudi-based ACWA Power Company has signed a 500-ha lease for the 500 MW solar and battery energy storage system (BESS) project to be built inside New Clark City (New Clark City, 2026). The BCDA has also tapped other foreign firms to generate energy for New Clark City, including a smart grid project with four Japanese firms in Tarlac and a 12-MW waste-to-energy plant in Capas (B. M. D. Cruz, 2026b; Mayuga, 2025).

The Philippines has the most expensive electricity rates in Southeast Asia, a situation attributed to its dependence on imported fuels like coal. Increased energy demand could not only result in grid instability but also rising rates. Meanwhile, LNG investments, also volatile and import-dependent, are rapidly expanding in the Philippines, backed by Japan and the U.S. (Bloomberg, 2026; Japan Bank for International Cooperation, 2025). Recently, the BCDA signed a memorandum of understanding with AG&P, a U.S.-owned, Singapore-based energy firm, to study the viability of an LNG corridor linking Subic and New Clark City (Philippine News Agency, 2026). The U.S. is the world's top LNG exporter (Hydrocarbons and Geothermal Energy Office, 2026).

There are also more direct, localized community impacts. Locals in Central Luzon are not unfamiliar with the potential for displacement brought by energy expansion. Grassroots movements such as Movement against Destructive Solar (MADSOLAR) and Save the Rice Granary Movement have emerged since massive solar farm developments cropped up in Nueva Ecija, Bulacan, Tarlac, and Zambales, displacing farmers and local communities. The 3,500-MW Meralco Terra Solar Farm project, for instance, covers 3,500 hectares in Nueva Ecija and Bulacan, affecting 22,000 residents, cropland, and tree cover (Marañon, 2026). An independent study estimates that 20,000 hectares could be used for solar and battery storage systems to provide 2 GW to CAMP (Mendoza, 2026b).

The industrial hub also comes with the resurgence of nuclear energy in the Philippines, aided by the U.S. government. Decades after the construction and abandonment of the Bataan Nuclear Power Plant, the DOE announced in September 2023 its target of reaching 1.2 GW of nuclear energy generation capacity by 2032 and 4.8 GW by 2050, targets now formally part of the Philippine Energy Plan 2023-2050 (Mercurio, 2023). This came a year after Kamala Harris, then U.S. Vice President, visited the Philippines to negotiate the 123 Agreement (Lalu, 2022). A year later, Marcos Jr. signed the 123 Agreement with the U.S., a bilateral civil nuclear cooperation deal that creates a formal legal pathway for U.S. companies to export nuclear technology, materials, and equipment to the Philippines (U.S. Embassy in the Philippines, 2026a). The development of nuclear energy in the Philippines involves severe geological vulnerabilities, marine thermal pollution, waste storage, and high capital risks (Center for Excellence in Disaster Management & Humanitarian Assistance [CFE-DMHA], 2024).

Like Pax Silica, the agreement has broad implications for the Philippines' energy security, its position in global supply chains, and its broader strategic alignment with the U.S. Under the auspices of the agreement, Meralco PowerGen Corp. signed a cooperative agreement with a U.S.-based nuclear developer to study the deployment of small modular reactors in the Philippines, supported by a $2.8 million technical assistance grant by the U.S. Trade and Development Agency (Newsroom, 2026). The Department of Science and Technology-Philippine Nuclear Research Institute is also partnering with U.S. startup Valar Atomics to build an experimental micro-reactor inside the University of the Philippines (Lagare, 2025). Valar Atomics is currently facing massive public opposition over its plan to build 456 small nuclear reactors for data centers on Utah public land (Brumfiel, 2026), with opponents citing unproven nuclear technology and environmental hazards (Larsen, 2026).

Intensified mining pressures

While government officials have stated that no mining will take place inside CAMP, a continuous supply of minerals for processing in the hub would depend on the existence of nearby mines to lower logistics costs. The nearest mines, however, are in Santa Cruz, Zambales, roughly 150 kilometers away (Figure 1). Unless mineral processing ambitions fail to materialize at all, the two possible outcomes are new mining sites in the area or new "Pax Silica" hubs elsewhere in the country.

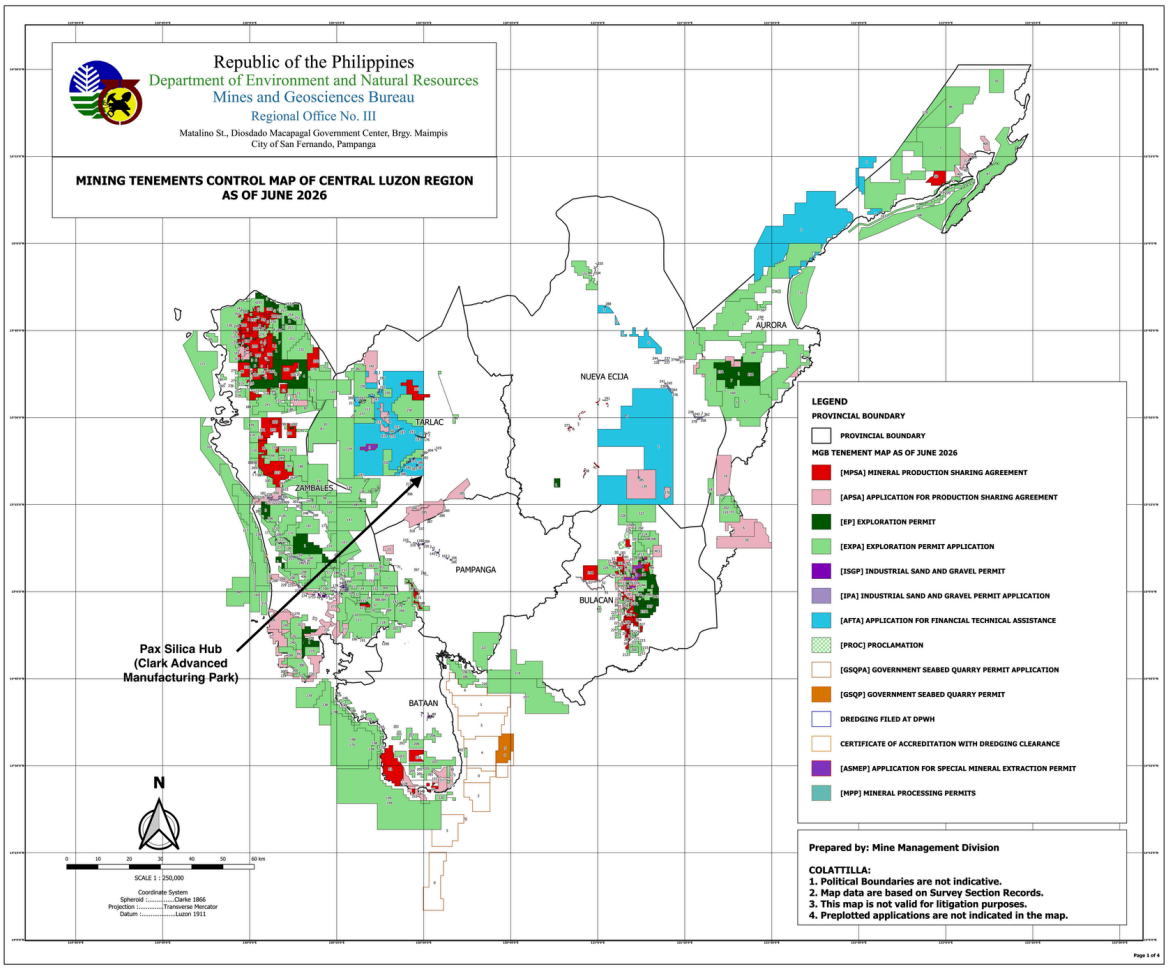


Figure 1. Location of CAMP relative to mining tenements in Central Luzon.
(Map by Mines and Geosciences Bureau [MGB], 2026f)

Given the signing of E.O. 122 and the Critical Minerals MOU, the rapid expansion of mining is already bound to happen with or without the CAMP, and the hub's additional burden is for Capas and Central Luzon in particular. There are 9 million hectares identified as having high mining potential, or nearly a third of the country's total land area (Mines and Geosciences Bureau, 2026e). As of September 2026, there are 814,000 hectares covered by approved mining and exploration tenements (nearly 3% of total land area) and 1.97 million more covered by mining and exploration applications (nearly 7% of total land area) (Figure 2). Central Luzon holds most of these applications, with 654,000 hectares threatened by mining in addition to 51,000 hectares already under approved tenements, or nearly a third of its total land area (Figure 1) (Mines and Geosciences Bureau, 2026a, 2026c, 2026d).

There is also the possibility of new mining sites outside Central Luzon, since many existing mining operators have already entered into offtake agreements—Rio Tuba Nickel Corp., for instance, has an agreement with Japanese-owned Sumitomo Metal Mining Co., to export all of its nickel until exhaustion (Nickel Asia Corporation, 2026).

DTI and BCDA also welcome the possibility of opening new industrial parks and mineral processing plants near existing mines in Dinagat, Agusan, and Palawan—except that these would not be called "Pax Silica," perhaps to avoid more controversy (Manila Bulletin, 2026). The same applies to data centers, which may be built in other SEZs under Pax Silica. Already threatened by extractive projects such as mining, communities in these areas will likely face increased pressure as the greater profits to be made from mineral processing push local government units to open up the remaining untouched watersheds and forests to mining. Like CAMP, these tend to encroach on Indigenous territories—up to 54% of all approved mining agreements' total area potentially overlaps with ancestral domains (Legal Rights and Natural Resources Center, 2025). There is also the risk of a race to the bottom among local government units, where permitting and tax relief powers are relaxed to attract investments.

814,701.38 (2.75%)
hectares covered by approved mining and exploration tenements nationwide

9,000,000 (30.41%)
hectares considered by the MGB as "high mineral potential" lands

1,970,603.41(6.66%)
hectares covered by mining and exploration applications nationwide

654,457 (29.73%)
hectares covered by mining and exploration applications in Central Luzon

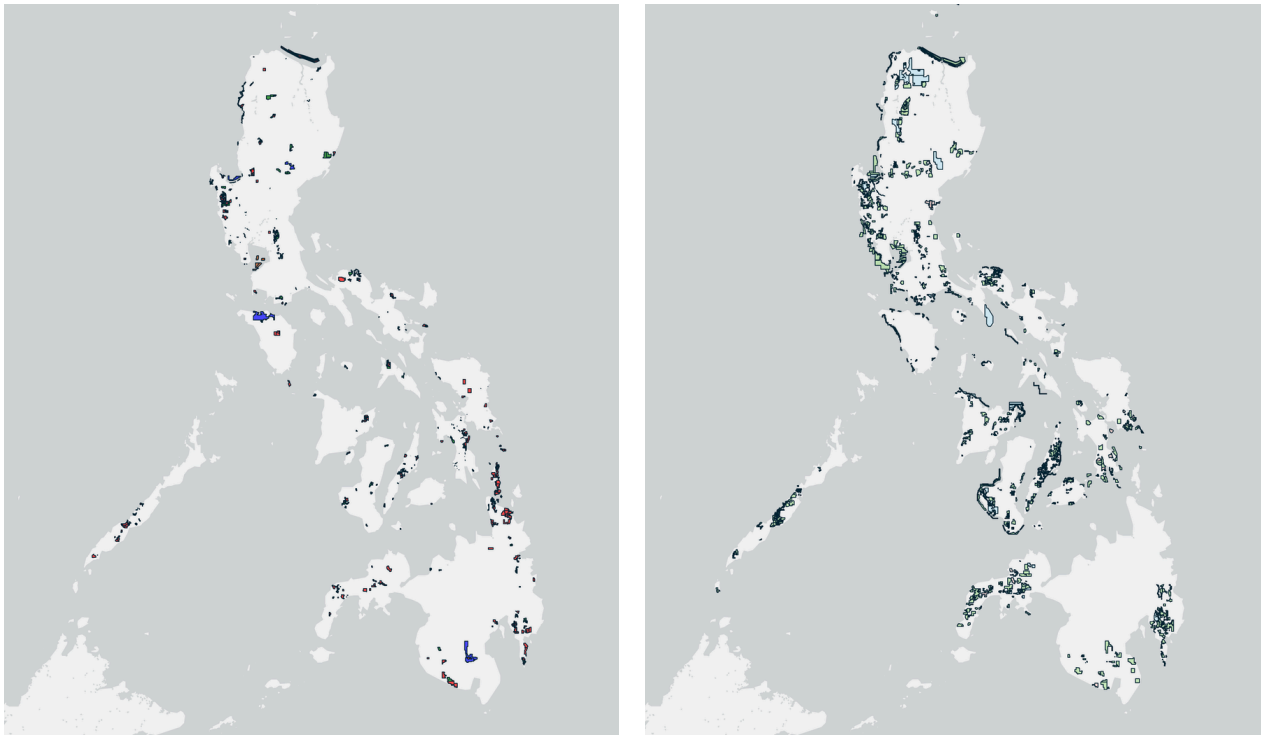


Figure 2. Approved mining and exploration tenements in the Philippines (left); mining and exploration applications under process (right) (Mines and Geosciences Bureau, 2026b)

Pax Silica's ecological footprint must be assessed against, and contend with, the problem of irreversibility. Standard cost-benefit analyses will be inadequate, as they often undervalue natural capital and treat it as replaceable (Arrow & Fisher, 1974). Informing this interrogation are the hard givens: material and energy use have limits, produced capital does not replace the natural capital it displaces, and that environmental disputes are fundamentally an issue of distributive justice—of who gains and who absorbs the costs and hazards (Martinez-Alier, 2002; Heffron & McCauley, 2022).



Photo by Pau Villanueva/PCP

No peace for local communities

The Aeta Indigenous community and local farmers are among the most directly affected groups. The encroachment of U.S. military bases, which became the CFSEZ, on the Indigenous Aeta's territories is well-documented. Displacement is traced to colonial Spain's naval station in Subic, a process that further intensified as the U.S. strengthened its military presence post-World War II, expanding Clark Air Base and significantly altering the Aeta culture in the process as it attempted to integrate and relocate the Aeta communities. A notice by the Office of the Provost Marshal of Subic Bay, dated January 11, 1983, for instance, stated (Cunanan, 1996):

> BE IT KNOWN THAT THE OFFICE OF THE PROVOST MARSHAL HAS NOTICED MANY NEGRITOS WALKING, TALKING AND JUST BEING SEEN IN PUBLIC PLACES IN AND AROUND THE GOLF COURSE AREA. ALSO, LET THIS SERVE AS A NOTICE THAT NEGRITOS ARE TO LIVE IN THE JUNGLE AREA AND ARE NOT TO BE SEEN BY THE PUBLIC WALKING ON THE ROADS OR ON THE GOLF COURSE AREA. IF VOLUNTARY ACTION BY THE NEGRITOS IS NOT TAKEN TO HIDE THEMSELVES IN THE JUNGLE, OPM WILL BE REQUIRED TO ENFORCE STRICTER MEASURES.

At the time, a growing concern was the possibility of the Aeta's "extinction" due to the threat of nuclear attack or accidents in the military base (Cunanan, 1996). Today, the base may be gone, but Pax Silica has had the effect of reviving these concerns. Concomitantly, it has also resurfaced their experiences with the expansion of New Clark City in recent years.

The hub's occupied area conflicts with standing ancestral domain claims and is surrounded by roughly sixteen sitios of the Aeta Hungey (Figure 3). One of them—Sitio Sapang Kawayan in Barangay Aranguren, which has a pending ancestral domain title application—is located inside the 1,619-ha area. One ancestral domain with a Certificate of Ancestral Domain Title (CADT R03-BAM-1215-195) even overlaps with New Clark City and its nearby river systems. Under the Indigenous Peoples' Rights Act (IPRA), ancestral domains comprise not only land but also bodies of water. Tapping these river systems to supply industrial operations necessitates the Free and Prior Informed Consent of the concerned Indigenous community.

However, the BCDA has not discussed conducting an FPIC process for the hub, as it maintains that the proposed development is on public land managed by the BCDA and designated for industrial development since 1992. Then-BCDA President Joshua Bingcang denied claims that the BCDA was buying up farmlands or that the project would encroach on Aeta communities, stating, "How can we buy that if that's our land? In the first place, that's government land" (Pechay, 2026).

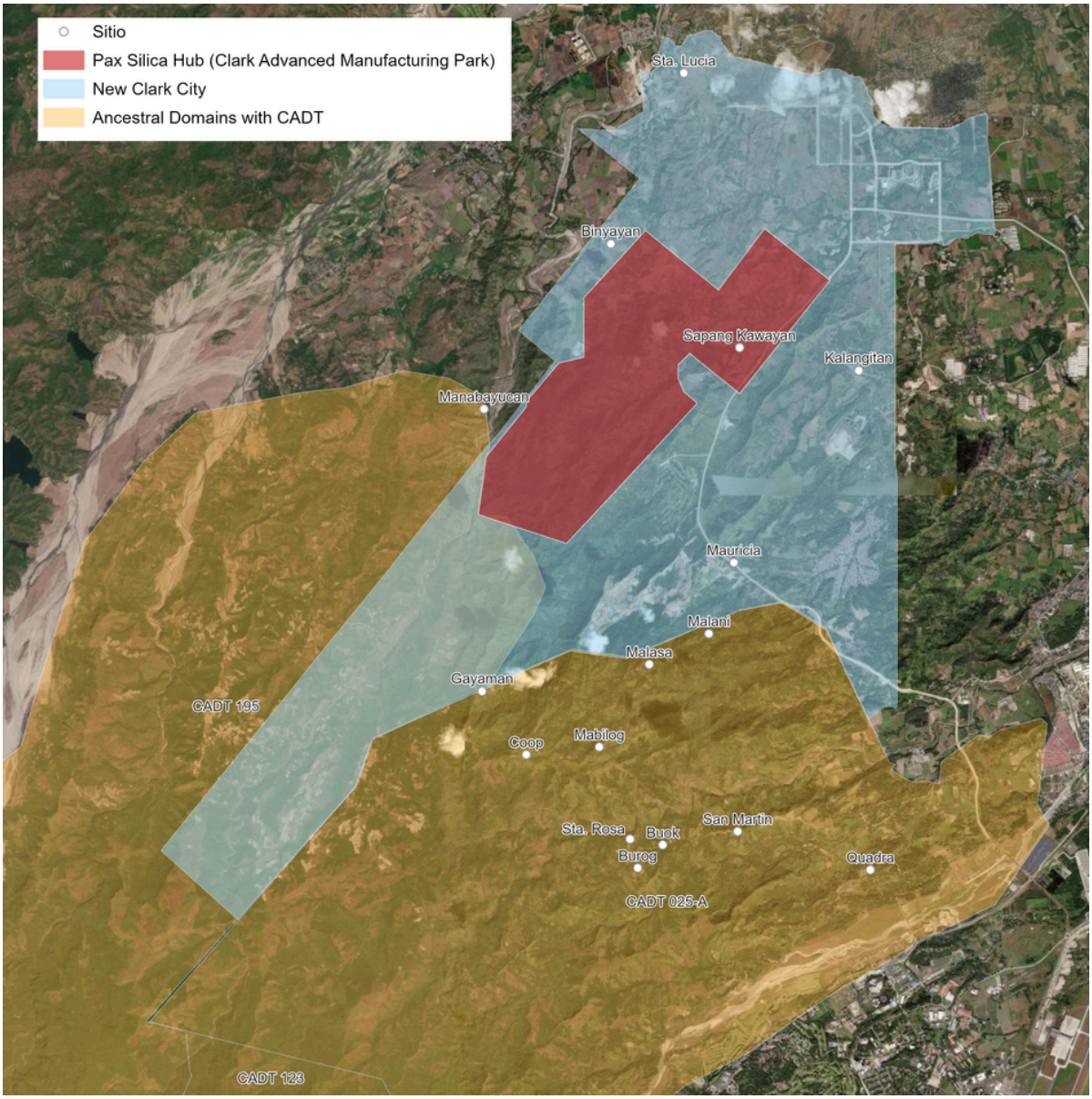


Figure 3. Ancestral domains and sitios surrounding the Pax Silica hub (Ulirat Collective, 2026)

This public land title has been invoked several times as the expansion of New Clark City conflicted with ancestral domain claims over the past few years. In 2019, the BCDA served Aeta villagers an eviction notice signed by then-Vice President Joshua Bingcang to make way for One Clark Boulevard, connecting the Clark International Airport and New Clark City. Locals reported that 500 families faced eviction and were threatened by armed men, local police, and bulldozers (Macaraeg, 2020; Orejas, 2019). The 19.8-kilometer road project was completed in September 2026 (Velasco, 2026). Around 200 Aeta families were also reportedly displaced by the construction of the SEA Games sports arena in Clark, which entailed fencing off communal lands and diverting natural rivers and streams of the Sapang Kawayan community (International Accountability Project, 2022; Santos, 2019).



Fort Stotsenburg, a U.S. Military Reservation in Sapang Bato, Angeles City
Public domain, via Wikimedia Commons

Now, Chieftain Petronila "Pet" Capiz-Muñoz of Sapang Kawayan is among those at the forefront of resisting BCDA's further expansion through Pax Silica. The community was recently given notice by BCDA employees to relocate by December to an area around 16 kilometers away inside New Clark City (Agence France-Presse, 2026). According to Chieftain Petronila, three hundred families are threatened with displacement, and they also fear the destruction of their burial grounds (Manila Bulletin, 2026).

It is important to note that the absence of a CADT does not eliminate an Indigenous community's claim to its ancestral domains. The doctrine in *Cariño v. Insular Government* (212 U.S. 449, 1909), which firmly established the concept of native title, or pre-conquest title to land, remains good law. Lands covered by native title are presumed to have never been part of the public domain, being held since time immemorial. The right to ancestral domains is neither created nor conferred but only recognized by a CADT. The Sapang Kawayan community's CADT application—filed in 1999, 2014, and 2019—remains pending due to bureaucratic challenges. Furthermore, under the IPRA, no license or lease may be granted while there is a pending application for a CADT (Republic Act No. 8371, 1997). H.B. 11758 (2026), which aims to establish the hub by law, further threatens these Indigenous territories—Section 13 converts the Zone into alienable and disposable lands classified as patrimonial property. While it provides an exception for ancestral domains, it only recognizes those that are titled. Nevertheless, the community persists in its assertion of tis right to recognition.

It must be recalled that following the Spanish-American War in 1898, the U.S. occupied the Philippines, seizing thousands of hectares of ancestral lands to build military bases. Among these is the Clark Air Base. The Aetas were forcibly displaced from their territories (Cunanan, 1996). In the 1990s, the Philippine Senate rejected the U.S. bases treaty. The U.S. then turned over Clark Air Base to the Philippine government—precipitated by the Mt. Pinatubo eruption—which converted it into the Clark Special Economic Zone (CSEZ)—and what would be CAMP, continuing to displace the Aetas in an unabated cycle of colonization.

Aside from Aeta communities, locals who rely on agriculture strongly oppose Pax Silica due to the threat of displacement. Capas Mayor Rodriguez estimates that 266 farmers on 410 hectares will be displaced and have been offered financial assistance by the BCDA to relocate to another area inside New Clark City (Manila Bulletin, 2026). Environmental organizations and agricultural groups have raised concerns about the permanent conversion of farmland, reduced food production capacity, and disruption of hydrological systems upon which farms depend. Barangay officials also reported that no public consultation has taken place. Capas Mayor Roseller Rodriguez told a committee that local officials had not been formally consulted about the proposed technology hub before it was publicly announced, nor about earlier Clark projects (Manila Bulletin, 2026):

> "Wala pong nangyaring consultation... Lahat po ng projects ng BCDA within New Clark City, hindi po dumadaan sa LGU ng Capas...As long as it is within the Clark Special Economic Zone, wala pong dadaan sa amin."

Mayor Rodriguez wrote directly to President Marcos Jr. to formally request presidential intervention, invoking Sections 2(c), 26, and 27 of the Local Government Code (Manabat, 2026). These sections require mandatory consultation with affected local government units and communities, and prior approval by affected Sanggunians (local legislative councils) for projects carrying potential environmental or social impacts. As affirmed in the case of *KMP v. APEZA* (G.R. No. 198688, 2020), no project may be implemented by government authorities, particularly those affecting ecological balance, without consulting local government units and concerned sectors (Republic Act No. 7160, 1991):

> Section 2(c). It is likewise the policy of the State to require all national agencies and offices to conduct periodic consultations with appropriate local government units, nongovernmental and people's organizations, and other concerned sectors of the community before any project or program is implemented in their respective jurisdictions.
>
> Section 26. Duty of National Government Agencies in the Maintenance of Ecological Balance. - It shall be the duty of every national agency or government-owned or controlled corporation authorizing or involved in the planning and implementation of any project or program that may cause pollution, climatic change, depletion of non-renewable resources, loss of crop land, rangeland, or forest cover, and extinction of animal or plant species, to consult with the local government units, nongovernmental organizations, and other sectors concerned and explain the goals and objectives of the project or program, its impact upon the people and the community in terms of environmental or ecological balance, and the measures that will be undertaken to prevent or minimize the adverse effects thereof.
>
> Section 27. Prior Consultations Required. - No project or program shall be implemented by government authorities unless the consultations mentioned in Sections 2 (c) and 26 hereof are complied with, and prior approval of the sanggunian concerned is obtained: Provided, That occupants in areas where such projects are to be implemented shall not be evicted unless appropriate relocation sites have been provided, in accordance with the provisions of the Constitution.



Narrowing policy space for minerals sovereignty

Pax Silica constrains the Philippines' sovereignty over its minerals less through any single binding obligation than through the cumulative effect of soft commitments and new domestic laws to revitalize mining. The industrial hub in Capas is only the most visible part of this architecture. Despite the government's common refrain that there are no binding agreements yet, it has gradually narrowed the space for sovereign resource governance through FORGE, the Pax Silica Declaration, and the Critical Minerals MOU.

Concerns have arisen concerning 99-year leases, the role of the BCDA as master-tenant, and the possibility of investor-state disputes. While the negotiated agreement is not available for scrutiny, it should be noted that the 1987 Constitution restricts foreign ownership of land (Art. XII, §7), limits foreign equity in certain industries (Art. XII, §§2, 7, 11), and requires Senate concurrence for treaties (Art. VII, §21). If the agreement contains provisions that could be perceived as ceding Philippine sovereignty—such as granting "diplomatic immunity" to foreign personnel, or establishing a "modern concession" with extraterritorial rights—it may be ripe for constitutional challenges. A *Wall Street Journal* article earlier reported that the hub will be a "special economic zone with diplomatic immunity and operating under U.S. common law" (Somerville & Wells, 2026), though Philippine government officials claim that the U.S. government's request for such an arrangement has been rejected. A treaty ratified with the concurrence of the Senate is also required by the Constitution, should an agreement allow the entry of foreign military bases, troops, or facilities (Art. XVIII, §25), particularly of a nature not already covered by the existing Visiting Forces Agreement (*Saguisag v. Ochoa*, G.R. No. 212426, 2016). Should these initiatives under the agreement lead to the manufacturing of defense technologies, they would blur the line between a commercial economic zone and a de facto military-industrial facility.

More importantly, Article XII, Section 2 of the 1987 Constitution vests ownership of natural resources in the State and requires that their exploration, development, and utilization remain under its "full control and supervision." Section 22 of the same Article treats acts that "circumvent or negate" its provisions as inimical to the national interest. This, in addition to a growing consensus that the pressures of the energy transition demand stronger mineral resource governance, serves as a substantive test for evaluating Pax Silica's instruments.

"Non-binding" MOU: Soft law, hard politics

While the MOU is non-binding or "soft law," it is functionally "hard politics"—it is a political commitment device designed to lock the Philippines into a U.S.-led critical minerals architecture. It may offer some industrial policy upside, but at the same time carry sovereignty costs and strategic alignment risks that the "non-binding" label obscures. Government officials have reiterated its non-binding nature, which, while technically accurate, is politically misleading if it is taken as inconsequential.

In international practice, MOUs are deliberately chosen because they are flexible, avoid treaty ratification processes, and can gloss over disagreements. They are not "nothing," since they function as coordination devices that align expectations and reduce transaction costs for private capital, as political signals that de-risk investment by signaling host-government alignment, and as precursors to binding instruments or are standard-setting (Committee of Legal Advisers on Public International Law [CAHDI], 2021). The MOU's operative language is revealing—"intend," "expect," "commit to"—and creates political accountability and reputational stakes, especially for the party with the weaker leverage.

Thus, should the Philippines later tighten permitting for environmental considerations, rethink first-look rights or asset-sale review, or impose non-market restrictions such as domestic processing requirements, it will likely face diplomatic friction. This will have real consequences, possibly including credit-access restrictions and exclusion from the broader trade network the U.S. is intending to build, effectively making it binding in political terms. An MOU also presents estoppel potential. Under international law, even non-binding instruments can result in legal consequences through estoppel (CAHDI, 2021).

More importantly, the above-mentioned provisions of the MOU are tantamount to an erosion of sovereignty. First, by formally entering into an alliance for supply chain decoupling and preferential trade, it clearly marks not just the country's alignment with the U.S. in terms of the U.S.-China rivalry, but also a rejection of resource nationalism. It may be recalled that there was once a push to ban nickel exports as Indonesia did, which was blocked by the mining lobby (Argus Media, 2025). The terms of cooperation, such as the prohibition of non-market mechanisms, foreclose revisiting options like this.

Pockets of resource nationalism have emerged across the developing world, showing alternative ways to "decouple" from global value chains and break the "resource curse." Indonesia has facilitated nickel downstreaming with ore export bans, local processing requirements, and other incentives (Terauds, 2017); certain African states have come together for regional cooperation to "not repeat past historical mistakes" in the cobalt and copper trade (Africa Minerals Strategy Group, 2025), while Chile is undertaking a lithium nationalization strategy (*Gobierno de Chile*, n.d.).

International trade frameworks have historically constrained the policy space required for these interventions and will likely narrow it further now that supply chains are couched as a matter of national security. Most of Pax Silica's signatories, for instance, have defense ties with the U.S. (World Bank, 2026). Under Pax Silica and FORGE, supply chain security is sought not only through investment facilitation and project collaboration but also through policy and institutional alignment. This takes shape in the following provisions of the Critical Minerals MOU:

- Section 1.1: Sharing of information and U.S. assistance in the analysis of the extent of the Philippines' mineral resource base
- Section 1.2(e): A "first look" for U.S. investors in critical mineral assets
- Section 1.3: A commitment to "accelerate, streamline, or deregulate" permitting
- Section 1.4: Cooperation on "price floors or similar measures" and "high standard marketplaces"
- Section 1.5: Development of authorities and diplomatic tools to review asset sales on "national security grounds"

Second, the MOU effectively invites U.S. input into Philippine regulatory and investment-screening decisions by giving U.S. investors a "first look" and the U.S. government the right to "review and deter critical minerals and rare earth asset sales on national security grounds." Third, Section 1.1 on information-sharing and assistance in the exploration of the country's mineral resource base sets up the possibility of granting U.S. agencies and their private sector partners access to sensitive geological surveys, mineral deposit maps, and resource valuation data. This is information that would otherwise be considered strategic national intelligence, being foundational input for investment decisions, pricing negotiations, and resource nationalism strategies.

The country's historical experience with foreign direct investment in manufacturing has been such that value addition remains unrealized. Pax Silica may be another bet on value addition, this time in the minerals industry. What the MOU creates is a real risk that the political costs of alignment would bar industrialization, especially given the lack of a national industrialization plan. Even assuming that the goal is integration with global value chains, not necessarily industrialization, it is still a bet that assumes the U.S. will prevail in the emerging critical minerals order, that Pax Americana subsists—all the while, current events suggest otherwise.

Foregone potential for sovereign resource governance

Despite the lack of binding obligations, the general architecture of Pax Silica will actively shape the trajectory of domestic mining policy. Executive Order No. 122 was recently promulgated, establishing the new "National Policy Framework for Developing the Critical Minerals Industry" based on four principles: state ownership, economic development, environmental protection, and policy stability for private sector participation (Executive Order No. 122, 2026). It is welcomed by many, certainly by the Chamber of Mines as a sign that the Philippines might finally leverage industrial policy to shift away from the pit-to-port model, albeit late compared to its peers such as Indonesia.

Yet, whatever optimism this supposed pivot may evoke must be weighed against its timing—advancing in tandem with commitments to joint governance and supply chain integration with the U.S. Notably, the EO was signed by President Marcos Jr. only months after signing the Critical Minerals MOU and the Pax Silica Declaration. It directs the following key agencies to perform these tasks, among others (Executive Order No. 122, 2026):

- Section 3: The DENR and the MGB to issue a list of critical minerals and implement a national exploration and mineral reservation program to take stock of our critical minerals, defined as "essential inputs for clean energy transition technologies, advanced manufacturing, digital infrastructure, national defense," and others
- Sections 4—6: The DENR and the Privatization and Management Office to cancel non-operational tenements and accelerate the privatization of critical mineral mining assets
- Section 7: The DENR-MGB to streamline and digitalize the permitting process through a Virtual One-Stop Shop
- Section 8: The DTI-BOI to promote value-adding critical mineral processing investments with market incentives and public-private partnerships
- Section 11: The re-organized Mining Industry Coordinating Council to submit a comprehensive work plan for the industry within 90 days, i.e., in November 2026

Notably, these tasks squarely align with the above-mentioned commitments by the Philippines to joint resource governance and supply chain integration under the Critical Minerals MOU. These commitments and ongoing negotiations with the U.S. will shape the planning process for the national policy framework, creating a real risk that the outcome is driven by external interests rather than domestic priorities.

Another key aspect of minerals sovereignty is the ability to decide how minerals are used and for what purpose, such as being able to repudiate the use of minerals for war. After expending a significant portion of its inventory of missiles and other weaponry in the Iran war, the Trump administration is planning to pour $3 billion into critical minerals and battery projects. Trump's rhetoric is illuminating (Renshaw et al., 2026):

> "We're reclaiming America's rightful place as the minerals superpower of the world...
> Critical minerals are the raw materials of American strength that power everything from advanced weaponry to automobiles."

The partnership between Philippine mining company Eramen Minerals and the U.S.-based technology company Æsir Technologies illustrates what supply chain cooperation with the U.S. might look like. Under the auspices of the Indo-Pacific Economic Framework, Eramen secured a $1 million grant from the U.S. Trade and Development Agency (USTDA) to undertake a feasibility study for a nickel processing facility at its mining site in Zambales (Æsir Technologies, 2021). This comes a year after Eramen and Æsir came to an agreement to develop a nickel-zinc battery manufacturing facility for "data centers, critical infrastructure, aerospace and defense industries" (Æsir Technologies, 2021). Æsir Technologies produces batteries used for the U.S. nuclear submarine fleet, intercontinental ballistic missile silos, tanks, and aircraft (Æsir Technologies, 2025). Aside from the deal with Eramen, the USTDA has a standing partnership with the Philippine government for a $5 million grant to develop the country's critical minerals sector (U.S. Trade and Development Agency, 2022).

Viewed against the history of mining in the Philippines, the introduction of Pax Silica is deeply alarming. Successive administrations have repeatedly turned to mining as a quick fix during economic downturns, pushing projects forward regardless of environmental harm or local resistance. Roughly nine million hectares—nearly a third of the country's land area—are identified as having high mineral potential, yet the industry has long lamented a restrictive permitting regime. What distinguishes the current moment is that the State has finally moved to formalize a national mining program—through Executive Order No. 122—not out of a coherent national industrialization strategy, but in response to global geopolitical currents and external commitments. With extraction now elevated to a centerpiece for "peace and prosperity" outside Philippine borders, the pressures on watersheds, farmlands, and ancestral domains are poised to intensify on an unprecedented scale.



Conclusion

Pax Silica extends far beyond the hub in Capas or the multilateral initiative. It is a broader political and economic mission driven by geopolitical anxieties, masked by the modernity of AI, but still harkening back to the "peace" of colonial extractivism. It runs through FORGE, the Critical Minerals MOU, and the Pax Silica Declaration, and is now reflected in Executive Order No. 122. Together, these mark an alignment with the U.S.'s attempt to restore its economic hegemony, trading away crucial policy space for regulation and mining policy.

The project draws strength from the country's longstanding frustration with its failure to industrialize. Yet the hub's promised gains remain forecasts, and nothing in the project departs from the enclave model that has kept the Philippines in the lower rungs of global value chains. With planning ceded to foreign investors, no binding commitments on technology transfer or local employment, and no national industrialization strategy, the projected benefits are illusory. The costs, meanwhile, are immediate and concrete, threatening Central Luzon's farmlands, rivers in Capas, and surrounding mountains exposed to mining. In other words, it externalizes its resource costs onto farms, households, and the environment. The heaviest burden falls on Aeta communities, for whom Pax Silica is the latest in a long history of dispossession tied to the former U.S. Clark military base.

The defense dimension, rarely named in official pronouncements but central to the initiative's logic, positions the hub within U.S. military-industrial supply chains, with projections of manufacturing for semiconductors and advanced electronics, which are dual-use inputs for missiles, drones, and surveillance systems. In doing so, Pax Silica's "economic security" framing blurs the line between commercial manufacturing and war production.

These are not separate defects but one architecture that is largely based on decisions made by and for external principals, with costs and risks borne by communities that were neither invited nor asked.

The government's repeated assurance that terms are non-binding provides no relief. These are, after all, political commitments to a historical trade and defense partner with far greater bargaining power. It merely creates dependence without the corresponding obligation of the other party. Sovereignty can be constrained without being transferred—investor-led infrastructure planning, a non-binding "first look" clause, and the confidentiality of commercial data all produce structural dependence, narrowing the state's policy space through the expectation of U.S. priority while remaining legally deniable at every step. Framing Pax Silica as a choice between investment and underdevelopment leaves out the option that many in the Global South have taken—including Indonesia, Malaysia, and Vietnam—engaging the United States and China while asserting control over mining and industrial policy for value addition.

Ultimately, Pax Silica will put the constitutional standard of "full control and supervision" over natural resource development to the test, as well as the state's preparedness to undertake national programs for industrialization and mining without passing the costs onto local communities. At a minimum, dealing with Pax Silica requires:

- Full disclosure of the proposed framework agreement, plans, baseline projections, and environmental assessments for the Clark Advanced Manufacturing Park, including the zone-level ECC and EIS, neither of which has been released.
- Recognition of native title under *Cariño v. Insular Government*, conduct of the FPIC process pursuant to the Indigenous Peoples' Rights Act, and meaningful consultation with the local government pursuant to Sections 26 and 27 of the Local Government Code before any site development, relocation, or negotiation. This requirement is now more urgent, not less, given the National Commission on Indigenous Peoples' (NCIP) 2026 revised FPIC guidelines shortening consensus-building periods to as little as 30 days for large-scale projects, among others—weakening the very safeguards that a project of CAMP's scale and opacity demands. Consultation cannot substitute for consent where the law requires consent.
- Following the principle of irreversibility, comprehensive ecological and grid-impact assessments to ensure CAMP's water and energy demand does not trigger scarcity nor destabilize the Luzon grid and inflate consumer rates.
- Senate scrutiny of the agreement and its implications on national sovereignty and extraterritoriality, and the dual-use character of the industries being hosted, including whether facilities could serve as platforms for military logistics or prepositioning.
- Review and reform of mining policy anchored on a just minerals transition, including whether Executive Order No. 122's promotion of mineral processing investments is compatible with enforceable environmental and community-consent standards.

None of these conditions can be met from the documents currently public. That is itself a finding: a project of this scale, advanced at this speed, has produced a transparency deficit that forecloses both democratic accountability and equitable resource governance. The premise is to assume various economic and ecological risks absent critical assessments and enforceable obligations. The test is not only whether the state retains formal title over minerals, but also whether the state can say no to an investor, to a timeline, to a use of water, to a military application, and whether communities can say no before the ground is broken. On the present record, the government has demonstrated neither capacity.



Fort Stotsenburg, a U.S. Military Reservation
Sapang Bato, Angeles City (1919-1941)
Public domain, via Wikimedia Commons

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