

"OPPORTUNITIES FOR BRITISH INVESTORS IN PHILIPPINE ECONOMIC ZONES"

A presentation for the:

UK TRADE & INVESTMENT BUSINESS SEMINAR ON PHILIPPINE INFRASTRUCTURE AND PUBLIC-PRIVATE PARTNERSHIP

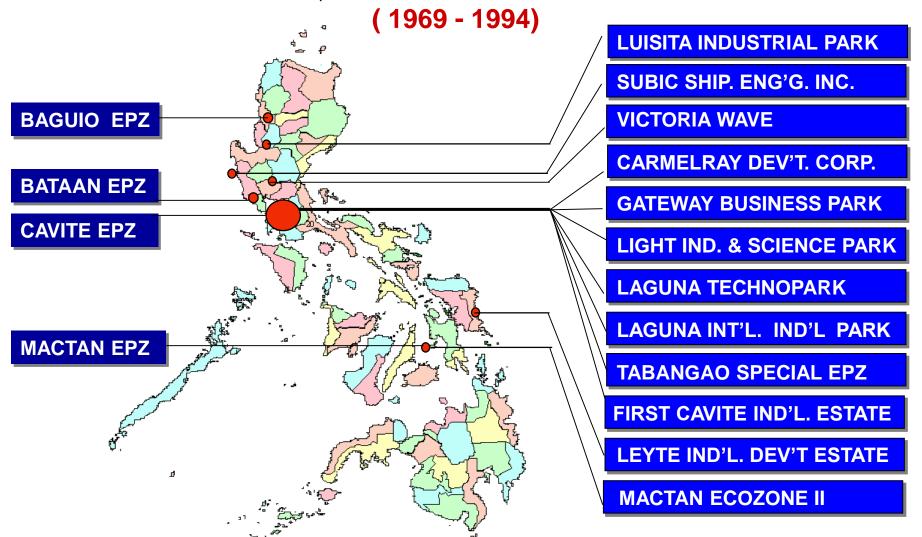
Philippine Economic Zone Authority

An investment promotion and incentive granting agency attached to the Department of Trade and Industry.

Reinforce Government's efforts to:

- Promote Investments
- Create Employment
- Generate Exports

16 EPZA- REGISTERED PUBLIC & PRIVATE ECONOMIC ZONES



Total Area: 3,183 hectares

TOTAL OF 308 ECONOMIC ZONES *

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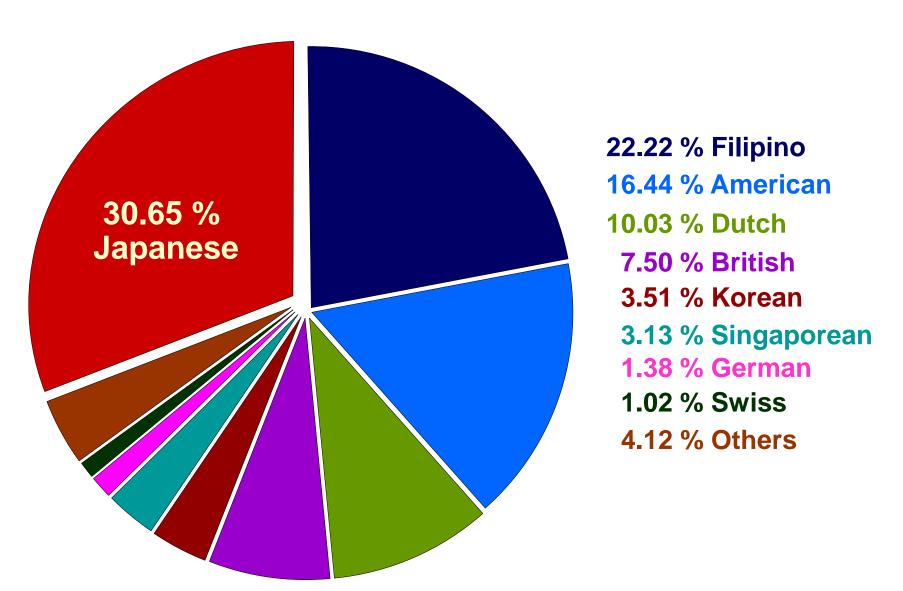
- 68 Manufacturing
- **201 IT Parks (43) and IT Centers (158)**
 - 19 Tourism Ecozones
 - 2 Medical Tourism Park / Center
 - 18 Agro-Industrial Parks

PARTNERSHIP WITH FOREIGN COMPANIES

Marubeni	_	Lima Technology Center and		
		First Cavite Industrial Estate		
Sumitomo	_	First Philippine Industrial Park		
Mitsubishi and	_	Laguna Technopark		
Kawasaki Steel				
Mitsui	_	Light Industry & Science Park		
Nisho Iwai	_	Carmelray Industrial Park 1		
Jurong Town (Asc	endas)	Carmelray Industrial Park 2		
Itochu	_	Luisita Industrial Park		
Tsuneishi	_	West Cebu Industrial Park		
Kao Corp	_	Jasaan Misamis Oriental Ecozone		
Samsung	-	Calamba Premiere		

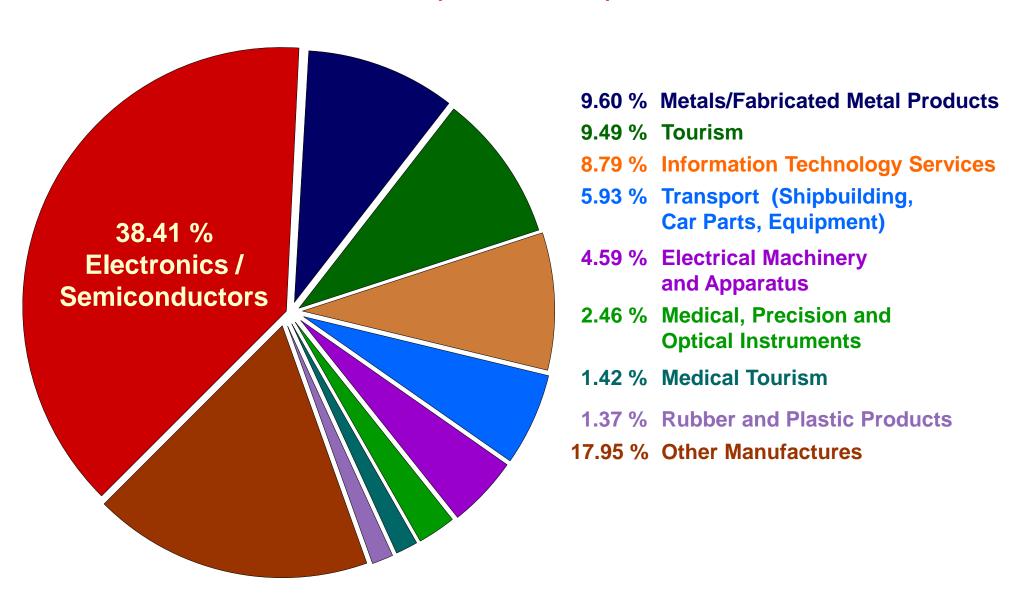
LOCATOR INVESTMENTS BY NATIONALITY

(1995 - 2013)



LOCATOR INVESTMENTS BY PRODUCT SECTOR

(1995 - 2013)



WHY INVEST IN THE PHILIPPINES

FILIPINO WORKERS

Among the Best in the World THE COUNTRY'S COMPETITIVE EDGE

Literate, English – speaking, easy to train, hardworking and very friendly



In the IT Service Sector

Filipino Workers are considered the new breed of world-class service professionals and are referred to as Global Knowledge Workers because they are intelligent and able to compete at the highest levels among the best in the world.



VERY FAST LEARNING CURVE OF FILIPINO WORKERS

- 8 weeks (2 months) to train Filipino workers
- Compared to 16 to 24 weeks (4 to 6 months) to train others

BUSINESS-FRIENDLY POLICIES

- 100% Foreign Ownership of Companies;
- Basic rights of Investors are guaranteed (right to remit profits and pay foreign obligations, right to repatriate investments)
- Simplified investments procedures

STRATEGIC LOCATION



VERY HOSPITABLE and COMFORTABLE SECOND HOME to EXPATRIATES

- Very friendly attitude of Filipinos towards foreigners
- Availability of quality primary and secondary education
 Presence of International Schools
- Housing closest to meeting western standards at very reasonable rental rates
- Best sporting and recreational facilities
 Many world-class golf courses.
- World class health care services

(Result of a survey conducted on expatriates in Asia)

WHY INVEST IN PEZA ECONOMIC ZONES

- A. FISCAL INCENTIVES
- **B. NON-FISCAL INCENTIVES**

FISCAL INCENTIVES for EXPORT COMPANIES

- Income Tax Holiday (ITH) or Exemption from Corporate Income Tax for four years, extendable to a maximum of eight years;
- After the ITH period, payment of the special 5% Tax on Gross Income, in lieu of all national and local taxes;
- Exemption from duties and taxes on imported capital equipment, spare parts, supplies, and raw materials;
- Domestic sales allowance of up to 30% of total sales;
- Zero Value-Added Tax (VAT) Rate on local purchases to include telecommunications, power, and water bills;
- Exemption from payment of local government taxes and fees.

NON-FISCAL INCENTIVES for EXPORT COMPANIES

- Employment of foreign nationals;
- Special visa for foreign investors and immediate family members;
- Unequalled service by PEZA.

PEZA IS A ONE-STOP SHOP

- Building and Occupancy Permits are issued by PEZA.
- Import and Export Permits are issued by PEZA.
- Automated and web-based Import & Export Procedures and e-Payment System (Paperless Transactions).
- Special multiple-entry non-immigrant visa processed in PEZA.
- Environment Clearance processed thru PEZA.
- Exemption from Local Government Permits and Fees.
- Registration requirements simplified, registration forms downloadable from website and uncomplicated, approval made easy.

PEZA IS A "NON-STOP SHOP"

- At the zones, PEZA provides 24 hours a day, 7 days a week of continuous service to locator companies.
- The Director General herself and other PEZA officials are on call 24 hours a day, 7 days a week.

In PEZA,



- NO RED TAPE
- ONLY RED CARPET TREATMENT

In PEZA, there is NO GRAFT NO CORRUPTION

Attestation

This is to attest that

Philippine Economic Zone Authority

PEZA Hoad Office, Pouny City, Metro Manila; Baguin City Economic Zene (BCEZ), Baguin City: Machan Economic Zene I (MEZ I), Mochan, Cebu, Czeche Economic Zene (CEZ), Rissinie, Carcie; Offuer Special Economic Zene (SEZs), IT Parks & Centres Supervising Offices; Laguna International Industrial Post (ILIP SEZ), Bisim, Laguna; Laguna Economic Zene (SEZs), El Parks & Centres Supervising Offices; Laguna; Light Industry and Science Park II (LISP 1-SEZ), Calamba City, Laguna; Light Industry and Science Park II (LISP 1-SEZ), Calamba City, Laguna; Park Philippine Industrial Park II (EIP SEZ), Calamba City, Laguna; Park Philippine Industrial Park II (EIP SEZ), Calamba City, Laguna; Calamba Industrial Park II (EIP SEZ), Sent Centre Industrial Park III (EIP SEZ), Sent Negaria, Tariac, Solite Shipyard (SS-SEZ), Solite; Zambiolov; TECO-SEZ, Mahakast, Pampunga; Angeles Industrial Park IIIP-SEZ), Beronina, Batane; Food Terminal, Inc. (TT-SEZ), Taping City, Metro Manile; Mermona Economic Industrial Park (HEIP-SEZ), Herman, Batane; Food Terminal, Inc. (TT-SEZ), Toping City, Metro Manile; Ankar Technology (AT-SEZ), Movitohya City, Metro Manile; PEZ Cavitono Documentation Units (PCD11); Proph's Technology Complex (FTT-SEZ), Calamba, Laguna; Calamba Premiere International Park II (CIP I-SEZ), Internation, Constructional Park II (CIP I-SEZ), Calamba, Laguna; Calamba Park (CAIP-SEZ), Busan, Batanga; Eur Valor (ET-SEZ), Internation, PEZA Hond Office

Had successfully undergone re-certification audit last December 1, 2, 5 and 6, 2011 conducted by AJA REGISTRARS INC.

and subsequently satisfactorily submitted its rectification plans in the prescribed corrective action request procedure

In accordance with the requirements of

ISO 9001:2008

and have now been recommended for continued certification.

The scope of certification is

ALL PEZA PROCESSES IN ALL PEZA SPECIAL ECONOMIC ZONES (SEZs) &
INFORMATION TECHNOLOGY (IT) PARKS/CENTERS NATIONWIDE
(Business Registration Permits, Zone Enterprise Operations, Incentives Administration,
Zone Estate Administration, and Adminnistrative Services)

-to

Paul B. Bagatsing Vice President / General Manager AJA REGISTRARS INC. 05 January 2012 Date

ISO 9001:2008

PEZA's Quality
Management System is
certified ISO 9001:2008.

PEZA is certified ISO 9001:2008 for all its processes, at all levels, in all sites, nationwide.



ONLY PEZA CITED FOR BEST PRACTICE AMONG ECONOMIC ZONES WORLDWIDE

"Under PEZA, the Philippines has shown dramatic improvements in Investment Climate.

End Result – PEZA is a shining example of successful regulatory reform improving overall investment climate in the country"

Study of Gohan Akinci Foreign Investment Advisory Services (FIAS), International Finance Corporation of the World Bank (IFC-WB)

Gokhan Akinci, FIAS

FIAS: Leaders in Investment Climate Solutions

IFC-World Bank



President Aquino's Reformist Gov't anchored on "daang matuwid" or straight path.

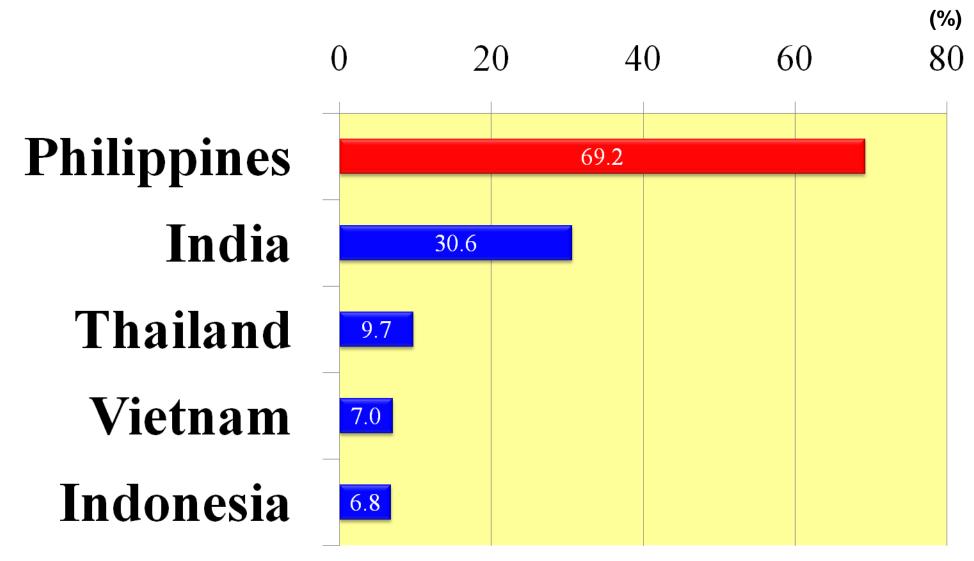
The Philippines is open for business with transparency, good governance and no corruption.



IETRO Japan External Trade Organization

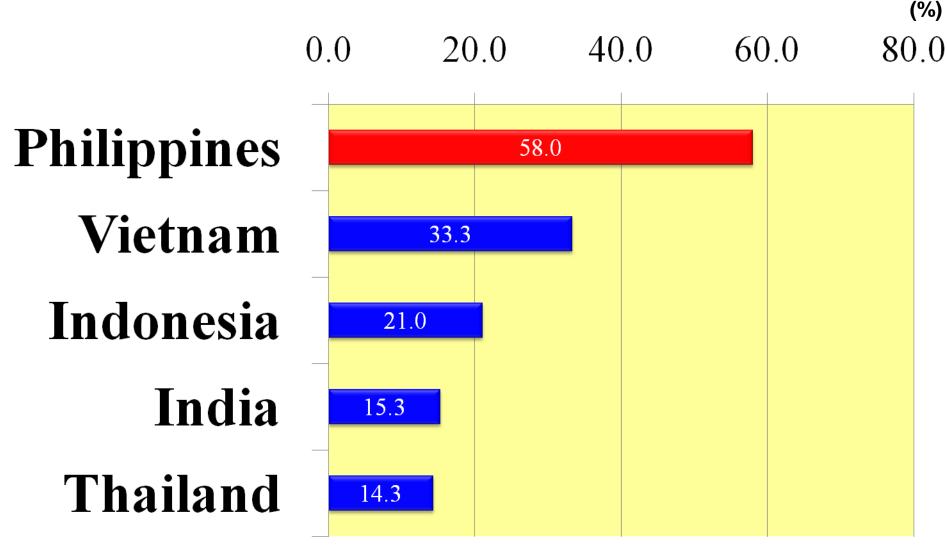
Survey of Investment Environment 2013

Less Linguistic/Communication Problems

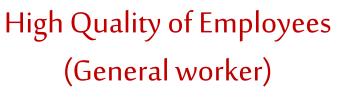


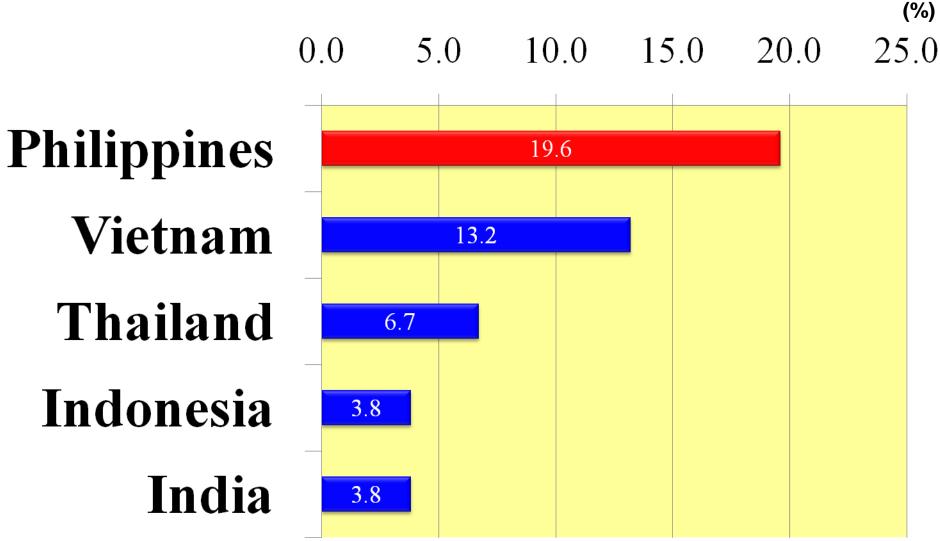
Source:

Easy to hire local staff (General worker/staff/clerk)



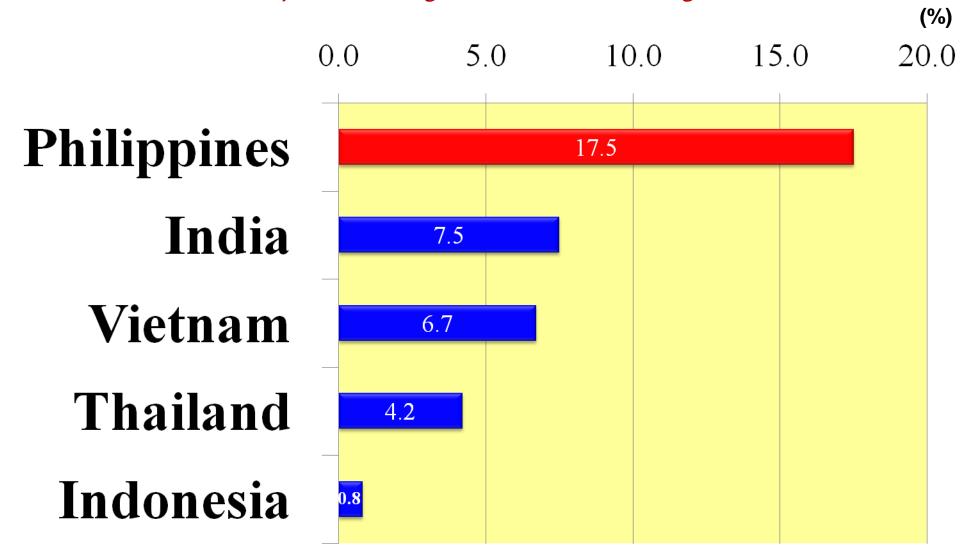
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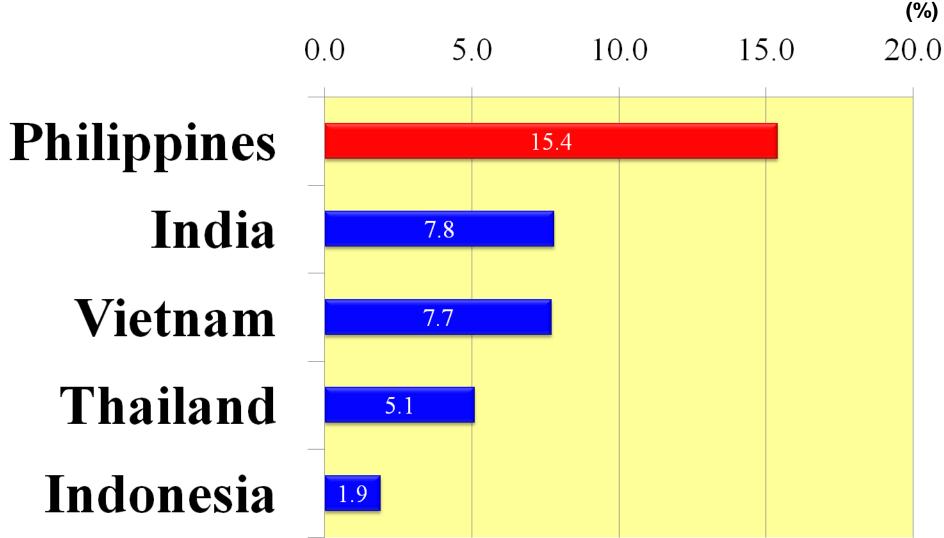
Source:

Easy to hire local staff (Specialist/Engineer/Middle-Manager)



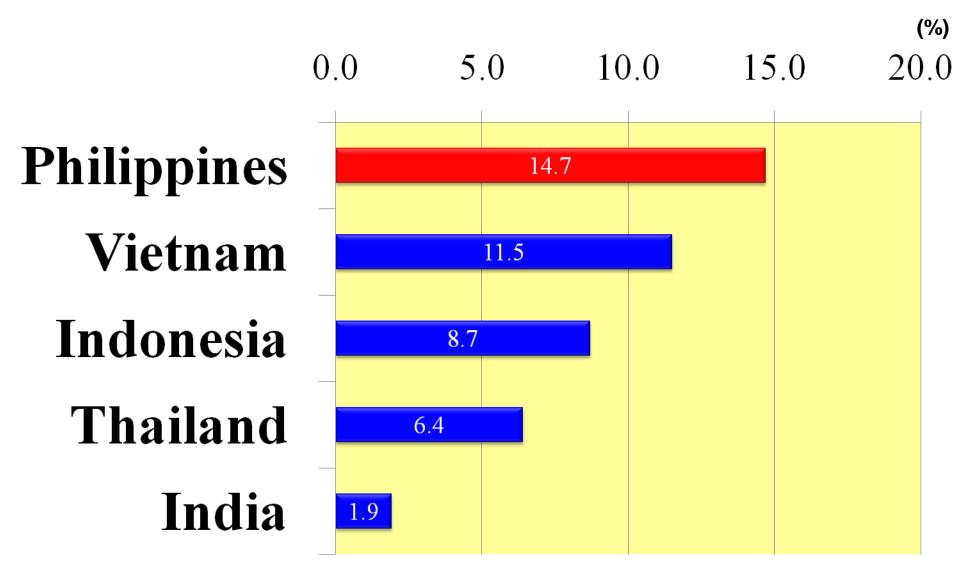
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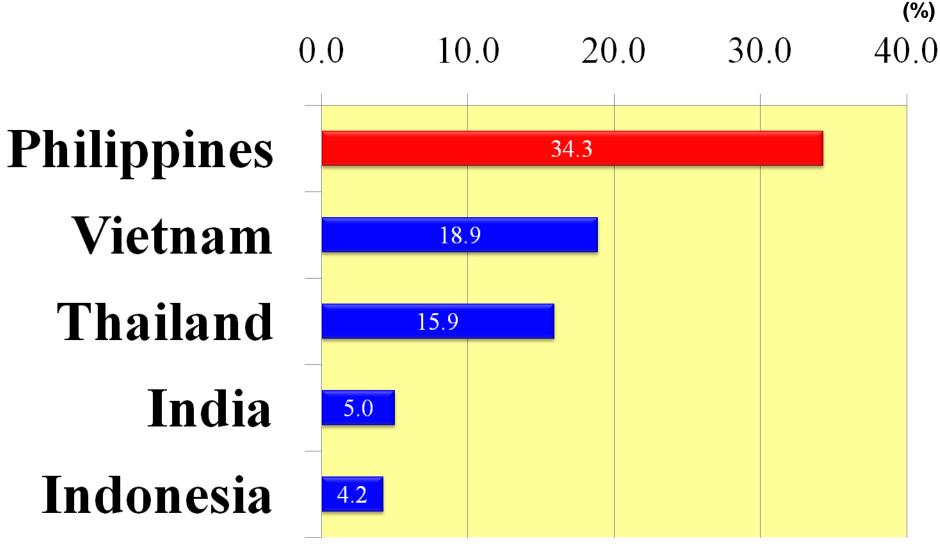


Source:

High Employee Retention Rates







Source:

Number of Strikes/Lockouts

(Unit: Number)

	2010	2011	2012	2013
Philippines	8	2	2	1
China	90	185	382	656
Indonesia	192	196	51	239
Thailand	3	14	12	11
Vietnam	424	978	468	327

Source

Philippines: National Conciliation and Mediation Board

China: China Labour Bulletin

Indonesia: Ministry of Manpower and Transmigration Thailand: Department of Labour Protection and Welfare Vietnam: Ministry of Labour-Invalids and Social Affairs

TOP CHIPMAKERS

SIX OUT OF THE WORLD'S TOP 20 CHIPMAKERS ARE OPERATING IN THE PHILIPPINES









TIPI



NXP



Samsung



ST **Microelectronics**

Source: SEIPI

TOP HDD PRODUCERS

THREE OF THE WORLD'S LARGEST HDD PRODUCERS ARE IN THE PHILIPPINES







Samsung

HGST

Source: SEIPI

THE WORLD'S TOP ELECTRONICS FIRMS



Analog Devices



Maxim Integrated



Amkor



HGST



Epson



ROHM

Source: SEIPI

WITH HOMEGROWN SMS & EMS FIRMS



... which serves diversified markets that include those in automotive, industrial and medical equipment, computer peripherals, solar energy, telecommunications infrastructure, storage device, and consumer electronics industries.

Notes:

SMS – Semiconductor Manufacturing Services

EMS – Electronics Manufacturing Services

Source: SEIPI





brother. TOSHIBA





SUNPOWER















PILIPINAS KAO INC







IBIDEN Philippines Inc.















































TI (Philippines), Inc.

Taganito Hpal Nickel Corp.

Toshiba Information

Tiger Resort

Sunpower Philippines

Ibiden Philippines

Coral Bay Nickel Corp.

Amkor Technology

NXP Semiconductors

Canon Business Machines

Hoya Glass Disk

Epson Precision

Electronics

Basic Metals

Electronics

Tourism

Solar Cells

Electronics

Basic Metals

Electronics

Electronics

Electronics

Electronics

Electronics

American/Dutch

Japanese

Japanese

American/Japan

British

Japanese

Japanese

Singapore/US

Dutch

Japanese

Japanese

Japanese

Travellers International

HGST Philippines

Rohm Electronics

Samsung Electro-Mech

St. Luke's Medical Center

Tsuneishi Heavy Ind

STMicroelectronics, Inc.

Integrated Micro

Panasonic Precision

Sureste Properties, Inc.

Toyota Autoparts

Tourism

Electronics

Electronics

Electronics

Medical Tourism

Shipbuilding

Electronics

Electronics

Electronics

Tourism

Automotive

Filipino/British

Dutch/Japanese

Singapore/Jap

Korean

Filipino

Japanese

Swiss

British

Dutch/Japanese

Filipino

Japanese

Convergys IT American

American Power Electrical Mach American

Lufthansa Technik Air Transport German

Pilipinas Kao, Inc. Chemical Products Japanese

Nidec Phils. Electronics Japanese

TDK Phils. Electronics Japanese

Taiyo Yuden Electronics Japanese

Analog Devices Electronics American/Dutch

Green Future Innovation Agro-Industrial Filipino

Accenture IT Dutch

JP Morgan Chase Bank IT American

On Semiconductor Electronics American

Continental Temic

Schweitzer-Mauduit RTL

Brother Industries

Terumo Phil

Lexmark International

House Technology

PASAR

Samsung Electronics

Teletech

Stream International

PV Tech

Cypress

Electronics

Tobacco Products

Office Equipment

Medical Instrm't

Office Equipment

Plastic Products

Basic Metals

Electronics

IT

IT

Electrical Mach

Electronics

German

American

Japanese

Japanese

Swiss

Singapore/Jap

Filipino

Korean

American

American/Dutch

Singapore/Jap

American

119 British Companies in PEZA Economic Zones

BRITISH ELECTRONICS AND SEMICON COMPANIES

SunPower Philippines Manufacturing Ltd. (Branch Office)
Integrated Microelectronics, Inc.
Astec Power Philippines, Inc.
B/E Aerospace B.V. Phil. Branch
First Philec Solar Corporation
Cirtek Electronics Corp.
Philippine Batteries Inc.
Automated Technology (Phil.) Inc.

BRITISH TOURISM COMPANIES

Travellers International Hotel Group, Inc. Boracay Shangri-La Hotel & Resort, Inc. West Villa Property Holdings, Inc. Punta Del Sur Holdings, Inc.

BRITISH APPAREL COMPANIES

Yuenthai Philippines, Inc. SuperL Philippines, Inc.

BRITISH FABRICATED METAL COMPANIES

Silgan White Cap South Asia, Inc. Everbrilliant Manufacturing Company, Inc.

BRITISH FURNITURE COMPANY

HH Group Cebu Inc.

BRITISH CHEMICAL PRODUCT COMPANY

Pan Century Surfactants, Inc.

BRITISH TEXTILES MANUFACTURING

Globesails, Inc. Hyde Sails Cebu, Inc. Sailtorque, Inc.

BRITISH REAL ESTATE COMPANIES

WCL Ventures Development, Inc. Agility Logistics Holding, Inc.

BRITISH LT. COMPANIES

BPO VOICE SERVICES

HSBC Electronic Data Processing (Philippines) Inc.

24/7 Customer Philippines, Inc.

Concentrix Services Corporation

Telus International Philippines, Inc.

C3/Customercontactchannels Philippines, LTD.

Capgemini Philippines Corp.

Genting Philippines Holdings Limited – Philippine Branch

Amberbase Solutions

Merlin Information Systems Philippines, Inc.

123 TEN, Inc.

Datacentric Corporation

BPO NON-VOICE SERVICES

Sutherland Global Services Philippines, Inc.

EXL Service Philippines, Inc

Seachange Philippines Corporation

Logica (Philippines) Inc.

Integreon Managed Solutions (Philippines), Inc.

HCL Technologies Philippines, Inc.

Freight Process Outsourcing Solutions, Inc

Cormant Technologies, Inc.

SUNPOWER Sunpower Philippines Manufacturing Ltd. (Branch Office)





Integrated Microelectronics, Inc.











B/E Aerospace B.V. - Phil. Branch





Cirtek Electronics Corporation



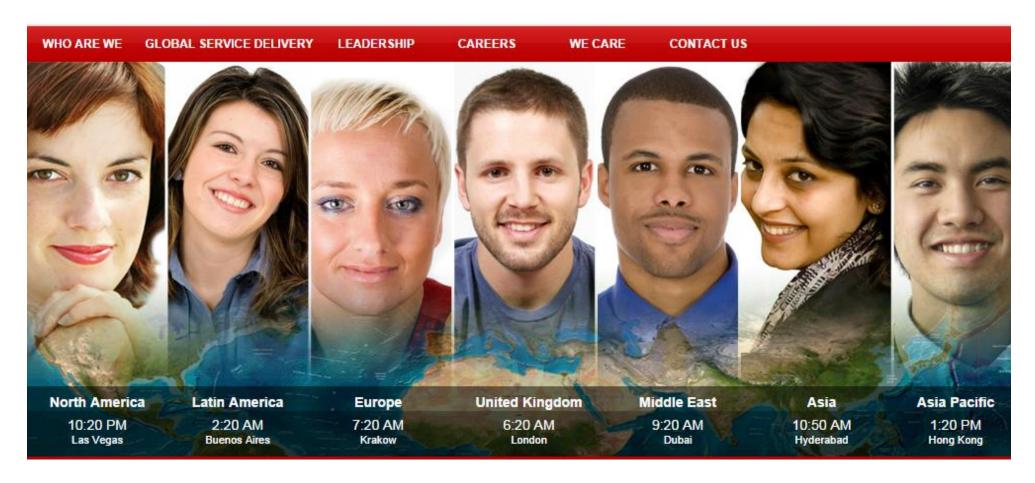


Automated Technology (Phil.) Inc.





HSBC Electronic Data Processing (Philippines) Inc.





Sutherland Global Services Philippines, Inc.



EXLSERVICE Philippines, Inc.







Boracay Shangri-La Hotel & Resort, Inc.





Travellers International Hotel Group, Inc.



359 European Companies in PEZA Economic Zones

(as of July 2014)

324 = EU Member Companies

35 = Non-EU Member Companies

324 EU Companies in PEZA

1. Austrian	7
2. Belgian	10
3. British	119
4. Cypriot	1
5. Czech	2
6. Danish	6
7. Dutch	88
8. Finn	3
9. French	21
10. German	38

324 EU Companies in PEZA

11. Irish	6
12. Italian	8
13. Luxembourger	2
14. Maltese	1
15. Polish	3
16. Slovakian	1
17. Spanish	3
18. Swedish	5

(Note: 18 out of 28 EU Countries have PEZA Investments)

35 Non-EU Companies in PEZA

1.	Liechtensteiner	2
2.	Macedonian	1
3.	Norwegian	6
4.	Russian	2
5.	Swiss	24

AVAITING YOUR INVESTMENTS!