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Pax Silica and the Philippines: A Fact-Based Assessment of Industrial Opportunity, Policy Risk, and Evidentiary Limits

An evidence-based research publication synthesizing relevant, reliable, and credible research on Pax Silica in the Philippines.

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Research Overview

Professional research publication · section-integrated visual edition

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This paper reorganizes and reframes the combined research base on Pax Silica into a journal-style analytical article. Based solely on the sources and claims evidenced in the research base, it argues that Pax Silica should not be reduced to a data-center project, but rather understood as a proposed strategic industrial ecosystem involving semiconductors, artificial intelligence (AI), advanced manufacturing, critical minerals, logistics, and research and development (R&D). The available evidence supports several core facts: the Philippines joined the U.S.-led Pax Silica initiative in 2026; a proposed approximately 4,000-acre (1,620-hectare) development site in New Clark City has been identified; and Philippine officials have publicly linked the initiative to advanced manufacturing, semiconductor-related activity, and AI infrastructure (Philippine News Agency, 2026a; Board of Investments, 2026a). At the same time, the most widely circulated headline figures—including projected investment volumes, job creation, and technology-transfer outcomes—remain contingent rather than realized. Environmental and infrastructure concerns, especially regarding water and electricity demand, are legitimate but cannot yet be quantified with confidence absent project-level technical details. The paper therefore concludes that Pax Silica is best interpreted neither as a guaranteed industrial breakthrough nor as a demonstrated extractive threat, but as a still-emergent policy and bargaining framework whose eventual developmental value will depend on contract design, infrastructure planning, regulatory enforcement, and the Philippine state's capacity to convert investment promotion into long-term industrial upgrading. **Keywords:** Pax Silica; Philippines; semiconductors; industrial policy; critical minerals; data centers; technology transfer; Luzon Economic Corridor

1. Introduction

Public debate surrounding Pax Silica has been marked by both optimism and alarm. In current discussion, official statements, media commentary, social-media claims, geopolitical interpretations, and environmental criticism are often presented side by side, sometimes

without clear distinctions between confirmed facts, projections, and conjecture. A more rigorous assessment requires separating what is established from what remains prospective.

The combined research base consistently advances one central corrective: Pax Silica should not be understood simply as a data-center project. The Philippine reporting cited in the source instead presents it as part of a broader industrial and strategic supply-chain initiative involving semiconductors, AI, critical minerals, advanced manufacturing, energy, logistics, and R&D (Philippine News Agency, 2026a; Board of Investments, 2026a). This distinction is analytically important because many criticisms appear to assume that the entire proposed New Clark City development is equivalent to a single large AI-server complex. The cited materials do not support that narrower characterization.

This article restates the research base in academic form. It preserves the underlying analysis while applying a more formal structure, clearer evidentiary boundaries, and consistent in-text citation. It uses only sources evidenced in the research compilation and does not introduce external authorities beyond those already embedded there.

2. Method and Evidentiary Scope

This paper is a source-based analytical rewrite rather than an original field investigation. Its evidentiary base is limited to the research compilation and the citations contained within it. Accordingly, the paper does not claim to verify every cited source independently beyond what is represented in the combined research materials. Instead, it treats the research synthesis text as a curated source bundle and reformulates it into a professional journal format.

The analysis follows a four-part evidentiary distinction implicit in the research base:

1. **Confirmed facts:** claims directly supported by official statements or published reporting cited in the research base.
2. **Projections:** forecasts, estimates, or scenarios attributed to government officials or institutions.
3. **Plausible but unproven claims:** assertions that are analytically reasonable but not yet demonstrated with project-specific evidence.
4. **Unsupported or speculative claims:** statements for which the combined research materials provides no sufficient proof.

This distinction is especially important in evaluating employment claims, environmental risks, technology-transfer expectations, and geopolitical narratives.

Evidence Hierarchy Used in the Report

Confirmed Facts

Joined Pax Silica; New Clark City site identified; 4,000 acres / 1,620 hectares; planning ongoing

Projections

US\$40–70B investment; 130k–190k direct jobs; 500k–800k indirect jobs

Plausible but Unproven

Technology transfer, value-chain upgrading, downstream processing gains

Unsupported / Speculative

Guaranteed breakthrough, certain water depletion, automatic mass displacement, war-production claims

Short discussion: This visual defines the evidence hierarchy used throughout the report. It is important because the central argument depends on separating what is confirmed from what is still projected or unsupported.

3. Pax Silica as Strategic Industrial Framework, Not Merely a Data-Center Project

The strongest supported point in the research base is conceptual: Pax Silica is not evidenced as merely a data-center venture. The Philippines joined the U.S.-led initiative in April 2026, and reporting cited in the source characterizes the initiative as one oriented toward semiconductors, AI, critical minerals, advanced manufacturing, and related strategic supply chains (Philippine News Agency, 2026a). Philippine officials have also associated the proposed New Clark City hub with semiconductor processing, electronics, AI computing, industrial R&D, manufacturing, critical-mineral processing, energy infrastructure, and logistics (Board of Investments, 2026a).

On this basis, the more accurate analytical model is an integrated industrial chain: critical minerals, processing, advanced materials, semiconductor and electronics production, computing infrastructure, AI, logistics, and R&D. Data centers may form part of that ecosystem, but the available evidence does not support collapsing the entire concept into data-center infrastructure alone.

The distinction matters for both supporters and critics. If the project is treated as an all-purpose AI server park, then environmental and employment arguments may be framed too narrowly. Conversely, if it is treated as an already realized semiconductor transformation, expectations may be overstated.

4. What Is Confirmed and What Remains Prospective

Several elements appear clearly established in the combined research materials. First, the Philippines has joined Pax Silica (Philippine News Agency, 2026a). Second, a proposed industrial and technology zone in New Clark City has been identified in relation to the initiative, with an approximate area of 4,000 acres or 1,620 hectares (Philippine News Agency, 2026a). Third, official descriptions link the site to advanced manufacturing, AI-related infrastructure, semiconductor-related activity, critical minerals, and R&D (Board of Investments, 2026a). Fourth, the source reports that the Bases Conversion and Development Authority (BCDA) has received expressions of interest from more than 20, and reportedly around 30, firms in manufacturing, technology, and energy (Philstar, 2026). Fifth, planning remains ongoing, and initial construction has been discussed for around 2028, subject to studies, agreements, and feasibility work (Philippine News Agency, 2026b).

By contrast, several commonly repeated claims remain unestablished as present fact. The combined research materials does not evidence a completed US\$40–70 billion investment package, an already functioning semiconductor fabrication cluster in Clark, a realized 190,000-job employment base, or a demonstrated technology-transfer regime producing large numbers of Filipino semiconductor specialists. These are better described as projections, aspirations, or possible outcomes than as accomplished facts.

This distinction is not semantic. In industrial policy analysis, confusing a proposal with an executed project can distort public expectations, weaken accountability, and blur the difference between investment promotion rhetoric and measurable developmental outcomes.

Item	Status / Detail	Basis
Philippines joined Pax Silica	Confirmed in cited reporting	PNA, 2026a
Proposed site in New Clark City	Confirmed as identified site	PNA, 2026a
Approximate site size	4,000 acres / 1,620 hectares	PNA, 2026a
Expressions of interest	More than 20 / around 30 firms reported	Philstar, 2026
Initial construction timing	Around 2028 under discussion	PNA, 2026b

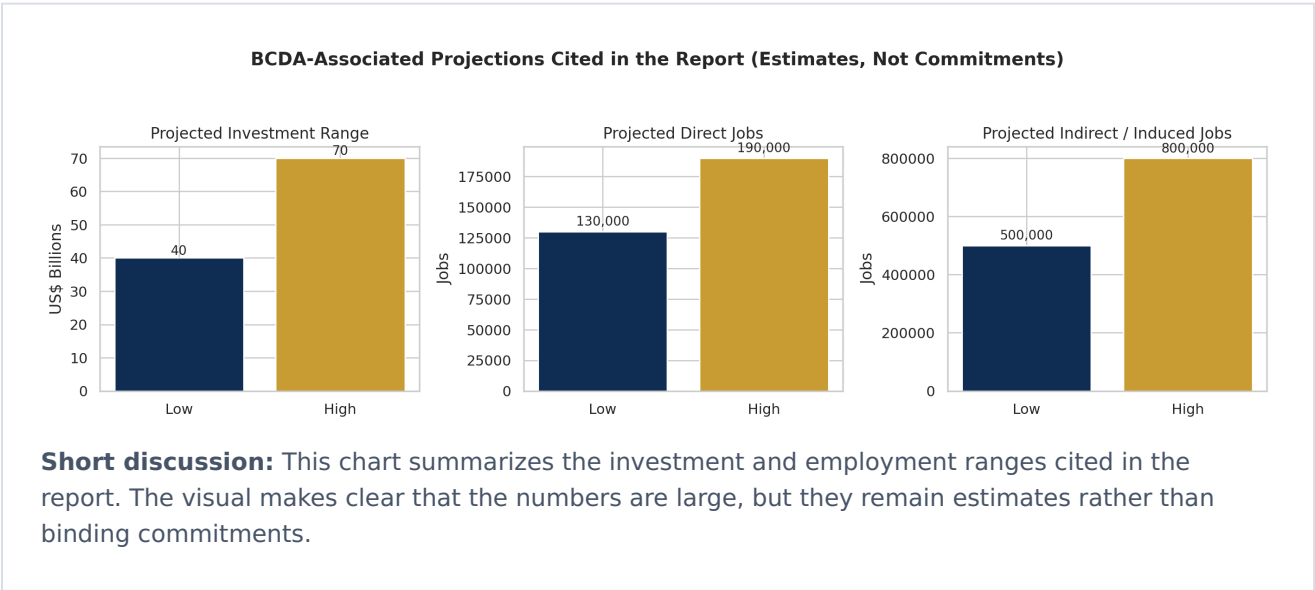
Short discussion: This table keeps the discussion anchored to what has actually been evidenced in cited reporting. It prevents projections and public claims from being mistaken for completed outcomes.

5. Investment and Employment Claims: Estimates, Not Commitments

Among the most widely circulated figures in the research base are BCDA-associated projections that full development over roughly 10 to 15 years could attract approximately US\$40–70 billion in investment, create 130,000–190,000 direct or high-quality jobs, and generate an additional 500,000–800,000 indirect and induced jobs (Daily Tribune, 2026). These figures are significant, but the combined research materials correctly treats them as estimates of potential development outcomes rather than firm contractual commitments.

The same caution applies to the larger “one million jobs” claim. According to the uploaded source, that figure refers to the broader Luzon Economic Corridor (LEC), not specifically to Pax Silica itself (Philippine News Agency, 2026c). Analytical precision therefore requires distinguishing between corridor-level projections and project-level forecasts. Conflating the two overstates what is currently attributable to Pax Silica.

A more careful formulation, consistent with the research base, is that BCDA has projected 130,000–190,000 direct jobs and 500,000–800,000 indirect and induced jobs for Pax Silica, while the broader LEC has separately been associated with projections of up to one million jobs (Daily Tribune, 2026; Philippine News Agency, 2026c). That phrasing preserves the source’s nuance and avoids converting estimates into guarantees.



6. Employment Quality and the Value-Chain Question

The combined research materials also treats the labor-market debate with useful caution. It rejects the unsupported claim that only low-quality jobs would be created, while also rejecting the inverse assumption that high-value engineering employment will automatically dominate. Both extremes lack sufficient evidence at the current stage.

In practice, a development of this scale would likely generate a mixed occupational structure, including construction, maintenance, security, administrative, food-service, transport, technical, engineering, logistics, and managerial roles. The unresolved question is not whether jobs will exist across multiple skill tiers, but what the eventual composition of those jobs will be. That is ultimately an empirical matter, and the uploaded source argues persuasively that government should publish occupational and skills profiles as the project becomes more concrete.

The source's BPO analogy is analytically relevant here. The Philippine outsourcing industry initially concentrated on lower-value transactional work but later expanded into finance, IT, analytics, software, HR, engineering, and global capability center functions. The lesson is not that all foreign investment naturally upgrades over time, but that capability deepening can occur when workforce development, institutional adaptation, and ecosystem formation align. Applied to Pax Silica, the relevant question is whether the Philippines can move from current strengths in assembly, testing, packaging, and distribution toward more advanced packaging, manufacturing, materials capability, fabrication-related functions, and R&D (Department of Trade and Industry, n.d.).

However, the available evidence does not justify assuming such progression will occur automatically. As the source emphasizes, upward movement in the value chain requires deliberate industrial policy rather than passive reliance on incoming capital.

7. Technology Transfer as the Central Developmental Test

The research base identifies technology transfer as the most important substantive policy question, and that conclusion is well supported. Large investment figures alone reveal little about whether domestic productive capabilities will deepen. From a developmental perspective, the critical issue is what remains in the host economy after investment has taken place.

The research compilation accordingly reframes the policy discussion around measurable capability outcomes: advanced training for Filipino engineers; partnerships with universities and research institutions; locally embedded R&D; supplier development for Philippine firms; and progression of Filipino workers into technical leadership, management, engineering, and research roles. These are more meaningful indicators of structural transformation than generalized promises of "technology transfer."

At present, however, the research base presents these outcomes as policy questions and negotiating goals rather than established features of the project. This distinction should be preserved. Technology transfer is a plausible and important objective, but the uploaded evidence does not show that such transfer has already been secured at scale.

8. Critical Minerals: Strategic Relevance and Analytical Limits

The combined research materials gives careful treatment to the minerals question. It cites Philippine Statistics Authority (PSA) mineral accounts valuing 2025 Class A reserves of gold, copper, nickel, and chromite at approximately ₱588.12 billion (Philippine Statistics Authority, 2025/2026). It also cites U.S. Geological Survey (USGS) material identifying the Philippines as the world's second-largest nickel producer in 2024 and seventh in cobalt production (U.S. Geological Survey, n.d.). These points support the claim that the Philippines possesses strategically relevant mineral resources.

Yet the source also cautions against simplistic inference. Mineral abundance does not automatically translate into direct semiconductor feedstock capability. Nickel and cobalt are especially important for battery and energy-storage supply chains, whereas semiconductor manufacturing requires a broader array of highly processed and specialized inputs, including high-purity silicon, specialty chemicals, gases, photoresists, copper, tungsten, and gold. On this basis, the claim that Pax Silica exists simply because the United States wants Philippine nickel for semiconductor fabrication is inadequately supported.

That said, the pro-development argument retains substance insofar as domestic downstream processing could allow the Philippines to capture more value from its resource base. The source contrasts an extractive model—mine, export ore, import finished products—with a value-added model involving refining, processing, manufacturing, assembly, and export of higher-value goods. The combined research materials does not establish that Pax Silica will necessarily achieve this transition, but it does support the view that downstream processing is a legitimate industrial-policy objective.

9. Environmental and Infrastructure Constraints

9.1 Water demand

The source takes a balanced position on environmental risk. It rejects the view that environmental damage is simply the unavoidable price of development and instead argues that environmental costs should be identified, mitigated, priced, and where necessary avoided. That position is consistent with a mature cost-benefit framework.

On water specifically, the combined research materials states that AI-related data centers can consume substantial quantities of water, particularly where evaporative cooling is used. It cites a 2026 arXiv study arguing that projected water-capacity requirements from U.S. data centers could become substantial by 2030 and that impacts are locally concentrated (Yang et al., 2026, as cited in the combined research materials). It also cites Associated Press reporting on groundwater concerns linked to data-center expansion in Virginia (Associated Press, 2026).

These citations support a narrow but important claim: data-center water use is real and may become a significant local infrastructure issue. However, the stronger claim that Pax Silica will deplete Clark’s water supply is not supported by the uploaded evidence. As the source notes, such an assertion would require project-level information, including the number of facilities, cooling technologies, IT load, water source, recycling rate, groundwater dependence, and local system capacity. The environmental concern is therefore legitimate, while the more dramatic viral prediction remains unsupported at present.

9.2 Electricity demand

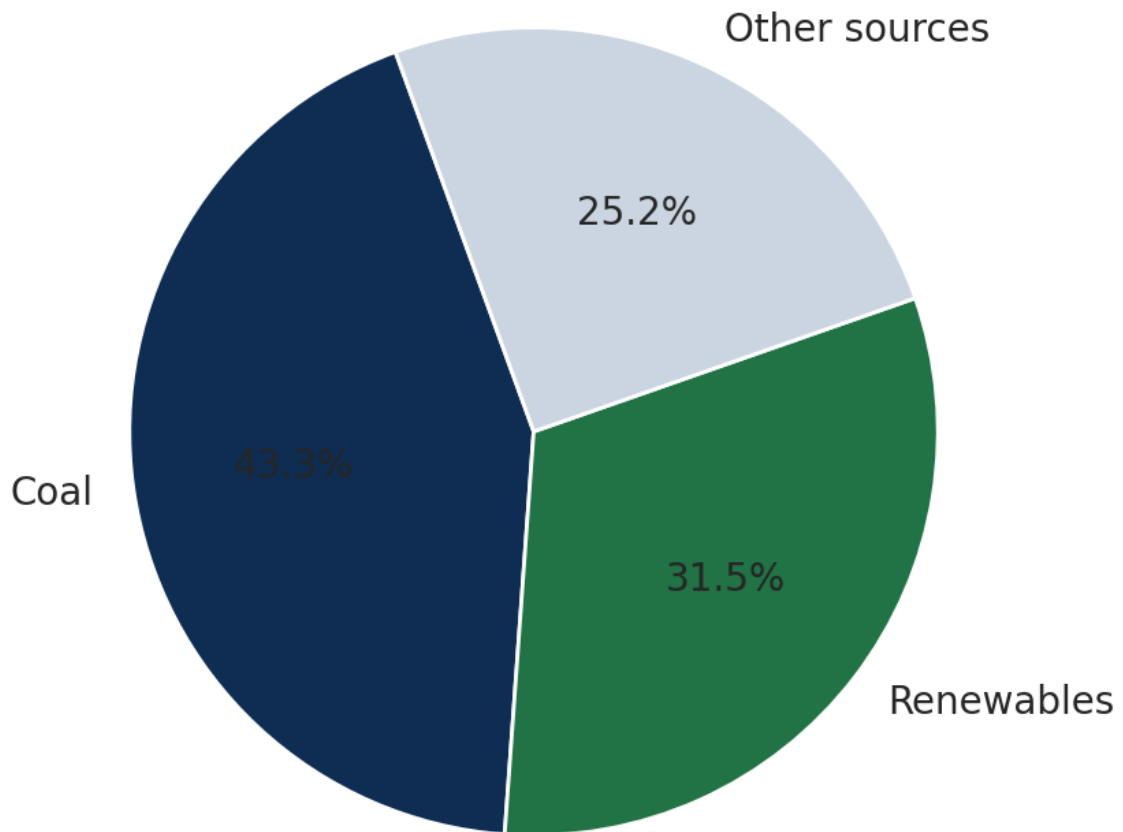
The same analytical pattern applies to electricity. The source correctly notes that AI infrastructure is highly electricity intensive and that this matters in the Philippine context, where power-system adequacy, cost, and reliability are already policy concerns. The combined research materials cites Department of Energy reporting that installed capacity stood at roughly 29.7 GW, with coal accounting for 43.3% and renewables 31.5% (Department of Energy, 2026, as cited in the combined research materials). It also cites reporting that Philippine officials have discussed renewable-energy solutions with Masdar in relation to the proposed AI hub, specifically because advanced AI processing and next-generation manufacturing require robust energy infrastructure (Board of Investments, 2026b).

The implication is not merely that Pax Silica will require electricity—that is obvious—but that additional generation, transmission, and distribution capacity may need to be financed and planned in advance. The combined research materials therefore frames the key policy question as one of infrastructure burden-sharing: who pays for the new capacity required to support high-load industrial and computational facilities?

9.3 Land use and displacement

The source also addresses concerns about agriculture and displacement. It does not dismiss such concerns, but it emphasizes that claims of automatic mass displacement require evidence about site boundaries, land classification, occupancy, title, agricultural use, ancestral-domain issues, and relocation plans. The combined research materials cites a government statement that approximately 40% of the designated manufacturing area would remain open space and that environmental and disaster-related studies are under way (Philippine News Agency, 2026b). That does not prove zero displacement, but it does indicate that generalized conclusions are premature absent site-specific documentation.

Philippine Installed Capacity Mix Cited in the Report



Short discussion: This chart adds context to the electricity discussion by showing the cited installed-capacity mix. It supports the report's point that any major high-load development must be evaluated against existing power-system realities.

10. Geopolitics, Strategic Supply Chains, and Information Disorder

The research compilation is persuasive in arguing that Pax Silica has a geopolitical dimension. Reuters is cited as describing the initiative in the context of securing AI-related supply chains and reducing dependency on non-allied sources (Reuters, 2026). On that basis, it is reasonable to situate Pax Silica within broader U.S.–China technology and supply-chain competition.

Still, the source properly distinguishes geopolitical context from unsupported escalation. The claim that Pax Silica is necessarily a war-production hub is speculative on the evidence provided. Semiconductors and AI are plainly dual-use technologies with both civilian and

military applications, but dual-use status alone does not establish a specific military function for a given industrial zone.

A similar caution governs claims about foreign information manipulation and interference (FIMI). The combined research materials notes intense online polarization but argues that polarization alone does not prove organized foreign manipulation. It may reflect a mix of authentic users, activists, bots, commercial interests, political factions, foreign actors, or combinations thereof. Without evidence of coordination or attribution, categorical claims that a foreign state is attacking Pax Silica through social media remain unproven.

This is one of the paper's most valuable methodological lessons: debates over strategic infrastructure should be assessed through source criticism and evidence hierarchies rather than through assumptions based on who appears to benefit rhetorically.

11. Comparative Context: Regional Competition and Industrial Race

The source provides two comparative illustrations. First, Singapore reportedly committed S\$800 million to semiconductor R&D under its RIE2030 semiconductor flagship in order to deepen high-impact technological capability and strengthen industry-academic collaboration (Singapore Economic Development Board, 2026). Second, the source references TSMC's investment in Kumamoto, Japan, as an example of how semiconductor investment can produce broader regional effects, while also acknowledging that Japan's institutional and industrial conditions differ materially from those of the Philippines.

These comparisons should not be overextended. They do not show that Pax Silica will succeed simply because other countries are investing in semiconductor ecosystems. They do, however, support the narrower and more defensible proposition that the Philippines is competing in an active international contest for industrial capability, strategic technology, and supply-chain positioning.

The source also cites a Pew Research Center analysis reporting more than 3,000 operational data centers in the United States and more than 1,500 more in development (Pew Research Center, 2026). This underscores the scale of global computing-infrastructure expansion. Yet, as the source notes, the U.S. example does not invalidate environmental concerns; rather, it shows that investment and environmental strain can coexist.

12. Industrial Policy versus Investment Promotion

Perhaps the most conceptually important distinction in the combined research materials is between investment promotion and industrial policy. Investment promotion asks how to attract firms. Industrial policy asks what kinds of industries, capabilities, and domestic linkages a country seeks to build over a multi-decade horizon.

The source argues that Pax Silica could matter economically if it becomes a tool for long-term capability formation in semiconductors, electronics, advanced manufacturing, and AI-related infrastructure. But if it remains only a vehicle for attracting foreign companies with land, incentives, and strategic location, then investment may occur without meaningful industrial transformation.

This distinction is especially relevant in light of the broader policy context cited in the combined research materials. Board of Investments reporting is cited to show that the Philippines approved ₱461.84 billion in investments in the first half of 2026, up 21% year on year, with 14,415 expected direct jobs (Board of Investments, 2026c). This suggests that Pax Silica should be understood as part of a wider effort to attract investment into renewable energy, electronics, semiconductors, digital infrastructure, logistics, and advanced manufacturing. The unresolved question is whether that wider effort will be coordinated by a developmental strategy with measurable domestic capability targets.

13. Policy Criteria for Evaluating Pax Silica

A strong contribution of the research base is that it translates abstract debate into concrete evaluation criteria. While these are normative proposals rather than proven features of the initiative, they provide a useful framework for assessing whether Pax Silica would constitute a good or bad bargain for the Philippines.

The research compilation identifies several priority conditions:

- measurable Filipino employment targets across technician, engineering, managerial, research, and executive levels;
- explicit technology-transfer commitments rather than vague training language;
- long-term partnerships with Philippine universities and research institutions;
- establishment of local R&D capability;
- supplier-development pathways for Philippine firms and small and medium enterprises;
- energy arrangements that do not simply consume existing household and industrial capacity without adding new generation or grid support;
- transparent water-management plans covering source, consumption, recycling, wastewater, and drought contingency;
- enforceable environmental safeguards;
- fiscal transparency regarding incentives, lease structures, public contributions, and projected revenues; and
- strategic safeguards ensuring continued Philippine legal and national-security oversight.

These criteria are useful precisely because they shift discussion away from broad ideological positions and toward measurable policy design.

Policy area	Evaluation criterion
Employment	Measurable Filipino employment targets across skill levels
Technology transfer	Explicit commitments rather than vague training language
R&D and universities	Long-term partnerships and local R&D capability
Supplier development	Pathways for Philippine firms and SMEs
Energy	New generation and grid support, not simple capacity diversion
Water	Transparent source, recycling, wastewater, and drought plans
Governance	Environmental safeguards, fiscal transparency, and legal oversight

Short discussion: This framework translates broad public debate into measurable policy questions. It shows that the quality of Pax Silica depends on terms around employment, technology transfer, utilities, and governance.

14. Synthesis: What the Evidence Supports

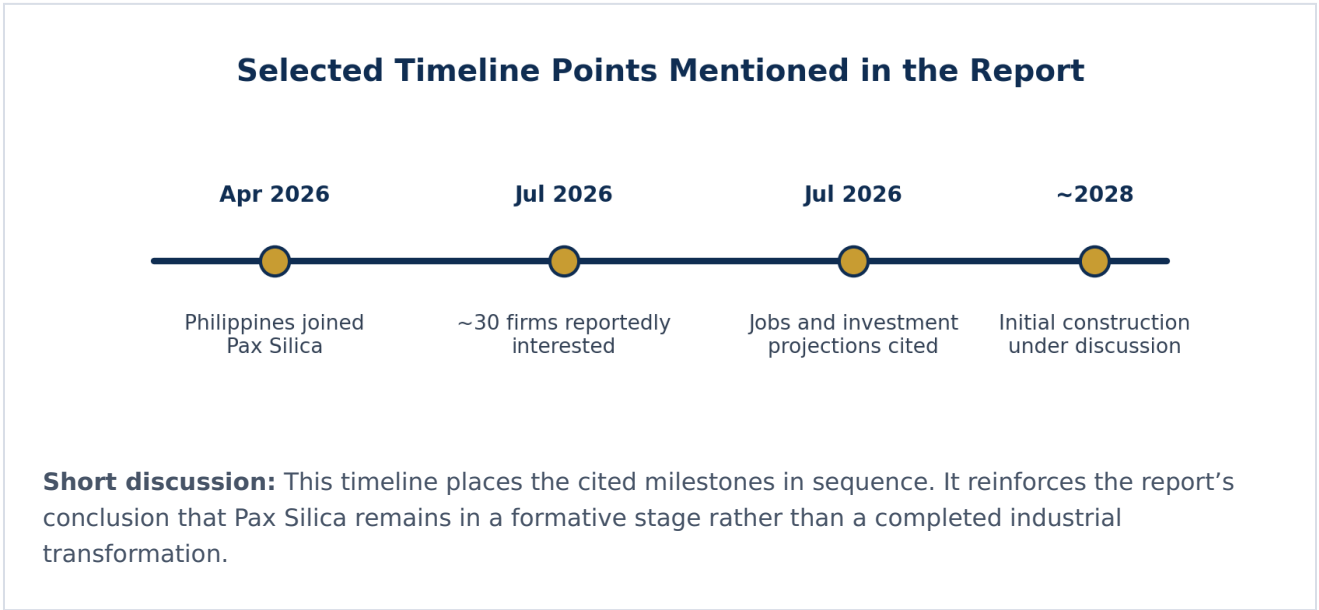
Based on the combined research materials, several conclusions are defensible.

First, Pax Silica is real as a strategic initiative, and Philippine participation in it is established (Philippine News Agency, 2026a). Second, the proposed New Clark City hub is evidenced as a multi-sector industrial concept rather than merely a data-center buildout (Board of Investments, 2026a). Third, semiconductors, AI-related infrastructure, critical minerals, advanced manufacturing, and logistics are all part of the proposal’s stated conceptual ecosystem (Board of Investments, 2026a; Reuters, 2026).

Fourth, the most frequently repeated headline numbers—US\$40–70 billion, 130,000–190,000 direct jobs, and 500,000–800,000 indirect jobs—should be treated as government-associated projections rather than guaranteed outcomes (Daily Tribune, 2026). Fifth, claims of one million jobs should be attributed to the broader LEC rather than directly to Pax Silica (Philippine News Agency, 2026c). Sixth, current evidence supports concern about water and electricity demand, but not deterministic claims that the project will necessarily overwhelm local resources absent technical planning and mitigation (Yang et al., 2026, as cited; Associated Press, 2026; Board of Investments, 2026b).

Seventh, the Philippines’ mineral wealth is strategically relevant, but simplistic narratives linking nickel extraction directly to semiconductor fabrication are analytically weak (Philippine Statistics Authority, 2025/2026; U.S. Geological Survey, n.d.). Eighth, the geopolitical dimension of Pax Silica is strongly supported, whereas more dramatic claims about military conversion or organized foreign information operations require evidence not provided in the source (Reuters, 2026).

Taken together, the material supports a cautious developmental interpretation. Pax Silica appears to be a potentially significant industrial opportunity whose success depends not on slogans but on bargaining power, infrastructure planning, environmental governance, and the ability to secure domestic capability formation.



15. Conclusion

The combined research base does not support either triumphalist or catastrophist accounts of Pax Silica. It does not justify portraying the initiative as a completed industrial breakthrough, because the key investment, employment, and technology-transfer outcomes remain prospective. Nor does it justify treating the project as already proven to be environmentally destructive, geopolitically malign, or socially dispossessive, because such conclusions depend on technical and contractual details that have not yet been established in the evidence provided.

The most defensible conclusion is therefore narrower and more demanding. Pax Silica should be evaluated as an emergent industrial-policy test. The opportunity is real insofar as the Philippines has strategic assets—location, labor, existing electronics capability, economic zones, and mineral resources—that could be leveraged in a global race for advanced manufacturing and AI-related supply chains. The risks are equally real insofar as large-scale industrial and digital infrastructure can produce uneven labor outcomes, environmental stress, and forms of enclave development with limited domestic upgrading.

Whether Pax Silica becomes a catalyst for Philippine industrial transformation or another instance of undercaptured value will depend on the state's ability to negotiate binding commitments, enforce safeguards, develop infrastructure, and align foreign investment with long-term domestic capability building. In that sense, the decisive variable is not the rhetoric surrounding Pax Silica itself, but the institutional quality of Philippine industrial policy.

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