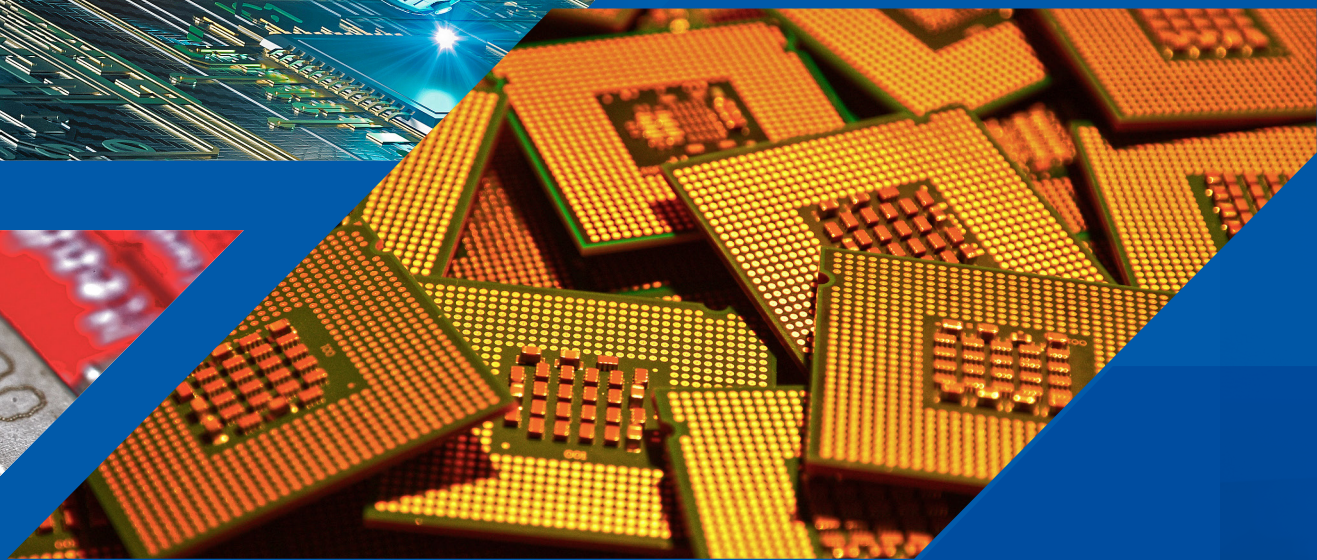
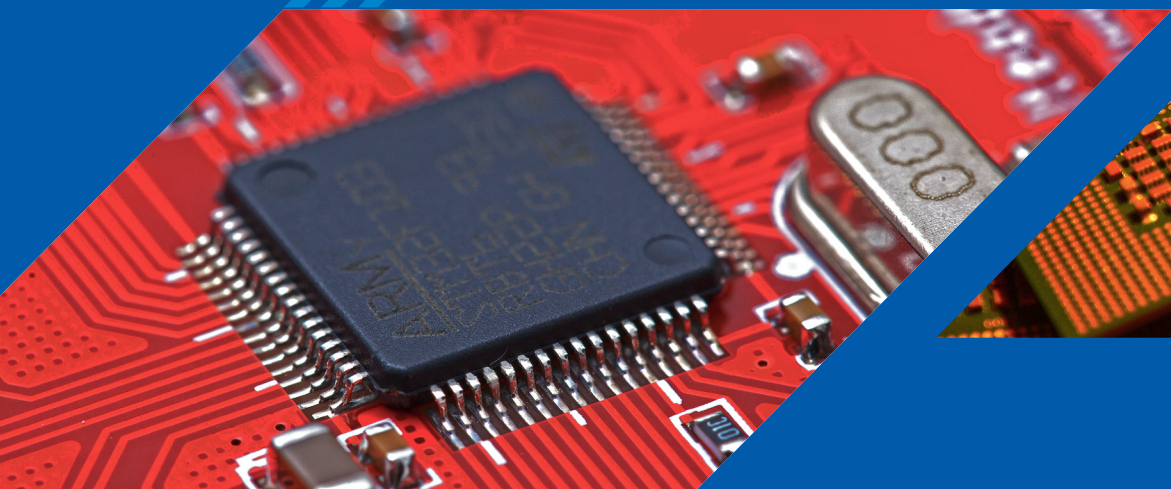




MALAYSIA'S E&E INDUSTRY



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MALAYSIA: A GLOBAL ELECTRICAL AND ELECTRONICS (E&E) PRODUCTS POWERHOUSE

Records of a well-rooted industry

E&E is a key driver of Malaysia's industrial development, contributing significantly to GDP growth, export earnings, investment, and employment, thus stimulating the growth of new economic clusters, particularly in relation to manufacturing-related services such as testing and engineering, as well as trade services-related global hub activities.

Malaysia's diverse electrical and electronics products (E&E) industry is in its fifth decade of operations, having started with just eight component production companies in the 1970s (also known as the "8 Samurais"). The companies were National Semiconductor (now Texas Instruments), Intel Malaysia, Hewlett-Packard (now Agilent), Advanced Micro Devices (AMD), Bosch, Clarion, Litronix (now Osram), and Hitachi (now Renesas). This

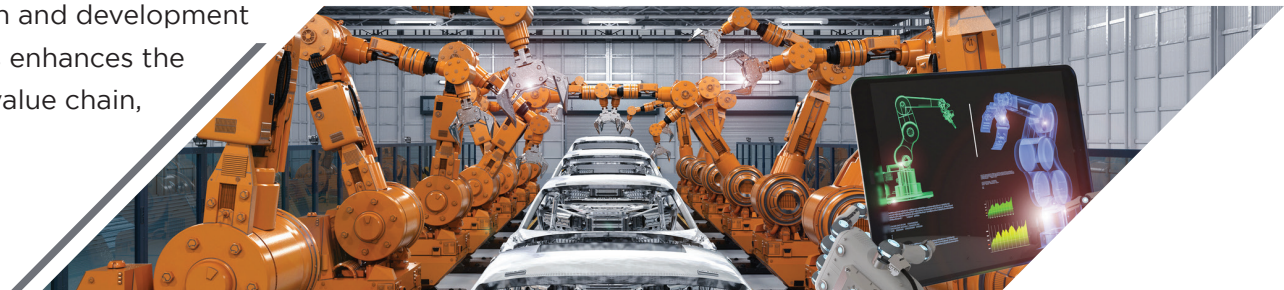
mature industry continues to grow with the adoption of new, innovative, and advanced technology. Malaysia today is a major player in the fast-expanding E&E market, with major export destinations including Singapore, Hong Kong, the United States of America (USA), the People's Republic of China (PRC), Japan and Europe. Local industry champions operate alongside multinational companies (MNCs) from the USA, Japan, the PRC (Taiwan), the Republic of Korea, and a number of European investors, manufacturing products ranging from semiconductor devices to consumer and industrial electronics.

The industry acts as a catalyst in the development of all other industries due to its propensity for innovation, firm commitment to capital investment, and substantial funding for research and development (R&D). This enhances the industry's value chain,

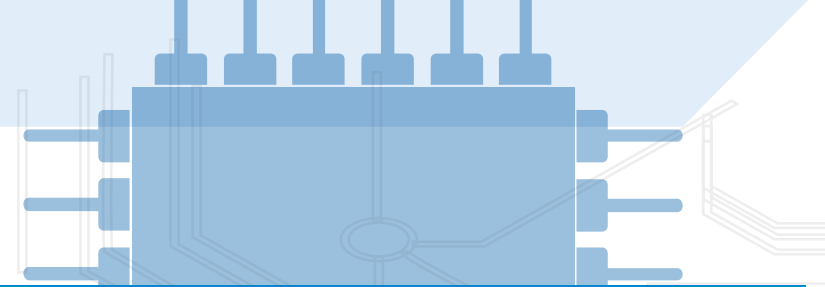
fosters the development of a pool of product design talent, and supports the training of employees capable of navigating matters such as Intellectual Property (IP) protection, licensing, and R&D.

Also known as the '8 Samurais,' these were the first foreign E&E companies to establish production facilities in Malaysia

- Clarion
- Litronix
- Advanced Micro Devices(AMD)
- Hitachi
- National Semiconductor
- Intel Malaysia
- Hewlett Packard
- Bosch



FIVE DECADES AND BEYOND



1970s

Malaysia attracted E&E investments through labour-intensive projects aimed at reducing unemployment, supported by a business-friendly government. Manufacturers concentrated on simple E&E components, semiconductor parts, and semi-knocked-down (SKD) electrical products.

1980s

As local companies matured and gained experience, the industry's sophistication in machining equipment grew in tandem. These companies began to manufacture consumer electronics parts and components and took on assembly-related work. The surge in demand for consumer electronics ensured that E&E manufacturing continued its upward trajectory.

1990s

Companies established design and development (D&D) centres to engage in semiconductor packaging development, manufacturing process development, and design activities. Office and computer equipment, including disks, dominated the era's manufactured goods, catering to the booming PC market demand.

2010

Malaysia climbed the value chain. To stay competitive, E&E factories transitioned from high-volume, low-mix operations to high-mix, low-volume operations. Wafer fabrication companies established and expanded facilities, further positioning the nation among the world's top E&E exporters, meeting regional and global demand for semiconductors.

Current

The Government, through MIDA, has been encouraging manufacturers to establish more R&D and D&D centres, centres of excellence, Global Services Hub, Global Trading Centre, and Principal Hub in Malaysia. E&E manufacturers are exploring opportunities in new growth areas such as E-Commerce, Automation, IoT, and AI, accelerating society and industry's transition towards Industry 4.0. Today, IoT is driving demand for advanced semiconductor devices such as sensors, resistors, and transceivers, enabling the industry to embrace digitisation and digitalisation to enhance productivity, profitability, and competitiveness. To further bolster this sector, Malaysia's National Semiconductor Strategy (NSS) aims to attract at least RM500 billion in investments and allocate RM25 billion in fiscal support. This strategic initiative focuses on transitioning the nation into a high-value player by developing homegrown talent and advancing capabilities in integrated circuit design and advanced packaging.

Future

The E&E manufacturing landscape is evolving as companies shift towards knowledge-intensive, high-tech, and innovation-driven activities with greater value creation. Supported by a growing talent pool—particularly in integrated circuit (IC) design—Malaysia is poised to advance into autonomous vehicles, smart machines, and robotics. AI will play a pivotal role in this transition, enabling data-driven insights and optimised processes for more informed decision-making. As Industry 4.0 progresses, these advancements will shape future industry trends and pave the way for a more connected and intelligent Industry 5.0 era.

EVOLUTION OF MALAYSIA'S ELECTRONICS INDUSTRY

E&E industry in Malaysia:

Started in 1970 with 8 Companies

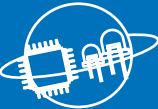


Consumer electronics: Clarion and Bosch

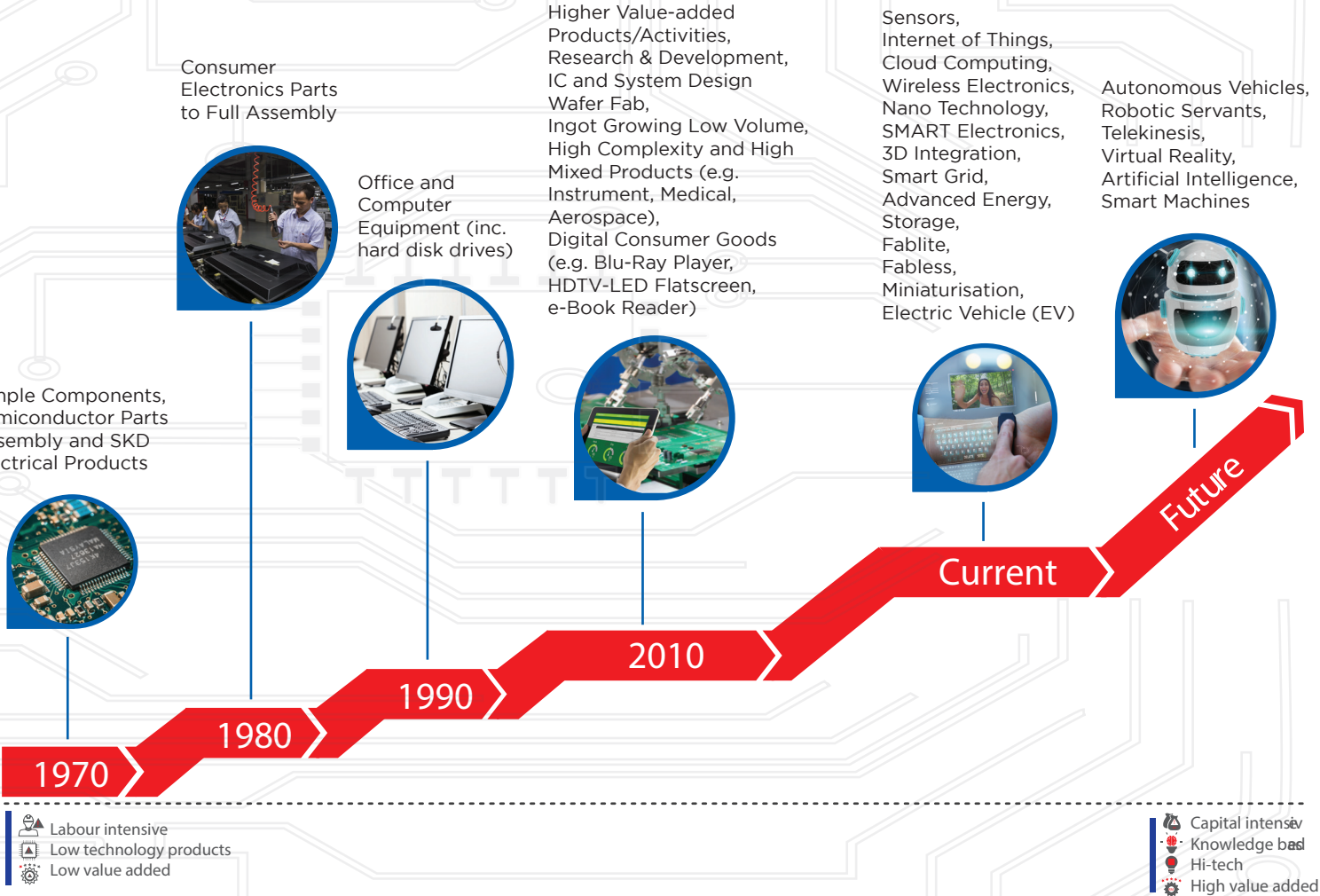
Components: AMD, Agilent, Intel, Osram, Renesas and Texas Instruments



Malaysia ranks 12th in Global E&E exporters



(World Trade Atlas)



FACTSHEET: THE E&E INDUSTRY TODAY

2023

2024

Foreign Investment (FI)

RM82.4 billion

Domestic Investment (DI)

RM3.0 billion

120

Number of Approved Manufacturing Projects

23,121

New Jobs

Total Approved Investments

RM85.4 billion

Foreign Investment (FI)

RM53.3 billion

Domestic Investment (DI)

RM2.5 billion

153

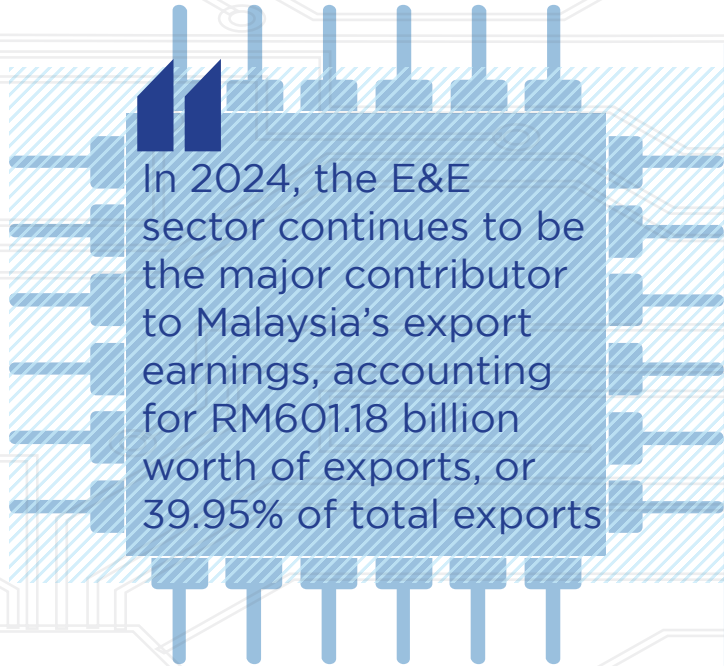
Number of Approved Manufacturing Projects

30,888

New Jobs

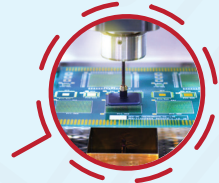
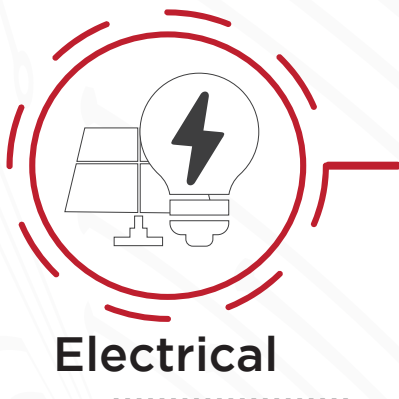
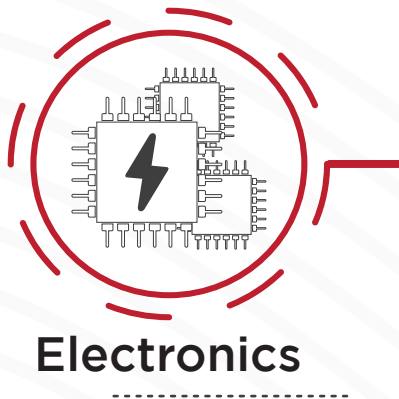
Total Approved Investments

RM55.8 billion



E&E AT A GLANCE

Malaysia's comprehensive E&E ecosystem includes companies ranging from local SMEs to large local corporations (LLCs) and foreign MNCs. These companies produce a variety of E&E products across all industry segments and subsectors.



Components

Semiconductors, passive components, printed circuit boards, metal stamped parts and precision plastic parts



Consumer

Audio video products such as television receivers, infotainment products, speakers, cameras and electronic games



Industrial

Multimedia and IT products such as computers and computer peripherals; telecommunications equipment; office equipment; and box built products for industrial applications



Electrical

Distribution boards, control panels, switching apparatus, lighting, transformers, cables and wires, primary cells and batteries, solar cells and modules, air conditioners, household appliances

MALAYSIA'S ELECTRONICS CLUSTERS

PULAU PINANG

IC/ Package/ Test design

Intel UST Global Microsemi
Phisontech IDT Oppstar
Infinecs Experior Efinix

Semiconductor back end

Osram Intel TF-AMD
IDT Avago ASE
Fairchild Micron Analog
Inari Globetronics

Components/ Module/ System/ Device/ EMS

Venture Plexus Knowles
WD Media Flextronic Jabil
Sanmina Amphenol Smart Modular
Benchmark Sandisk Nategate

Product & Equipment

Keysight NI Malaysia HP
Agilent LDA Bosch Clarion
Aemulus

LED

Lumileds Osram Globetronics

Solar

Jinko

KELANTAN

LED

Rohm Wako

KEDAH

IC/ Package/ Test design

Whizz

Semiconductor front end

Osram Fuji Electric Infineon
Silterra

Semiconductor back end

Intel Fuji Micron

Components/ Module/ System/ Device/ EMS

Sharp Celestica Smartrac
BCM

Solar

First Solar Risen

PERAK

Semiconductor back end

Carsem Unisem

Components/ Module/ System/ Device/ EMS

Murata Coherent K-One
Salutica

TERENGGANU

LED

Avialite

SELANGOR

IC/ Package/ Test design

KeyAsic Symmid IC Microsys
JF Technology

Semiconductor front end

S.E.H MEMC MIMOS

Semiconductor back end

Freescall TI Amkor

Components/ Module/ System/ Device/ EMS

Sensata Betamek Success

Product & Equipment

Panasonic Sony Sharp
Samsung

LED

Nichia My LED

Solar

Longi Hanwha Q Cells

NEGERI SEMBILAN

Semiconductor front end

On Semi

Semiconductor back end

On Semi Nexperia

Components/ Module/ System/ Device/ EMS

Alps TDK

Product & Equipment

Samsung

MELAKA

Semiconductor front end

Testhub

Semiconductor back end

Infineon TI

Components/ Module/ System/ Device/ EMS

Maruwa TDK
Vishay Semiconductor

Product & Equipment

Panasonic

LED

Dominant Opto

Solar

Sunpower

JOHOR

Semiconductor back end

ST Micro Micron

Components/ Module/ System/ Device/ EMS

Flextronics Celestica WD
Media Seagate Foxconn
IPEX Global Manufacturing
V.S. Industry SKP SMT

Product & Equipment

Panasonic

SARAWAK

Semiconductor back end

X-Fab Melexis

Components/ Module/ System/ Device/ EMS

Taiyo Yuden HGST

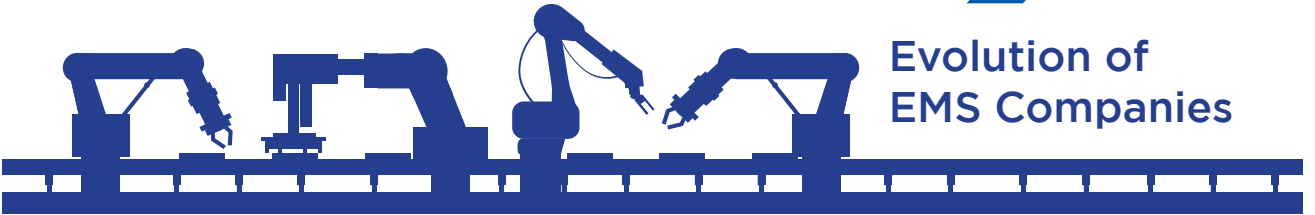
Solar

Longi

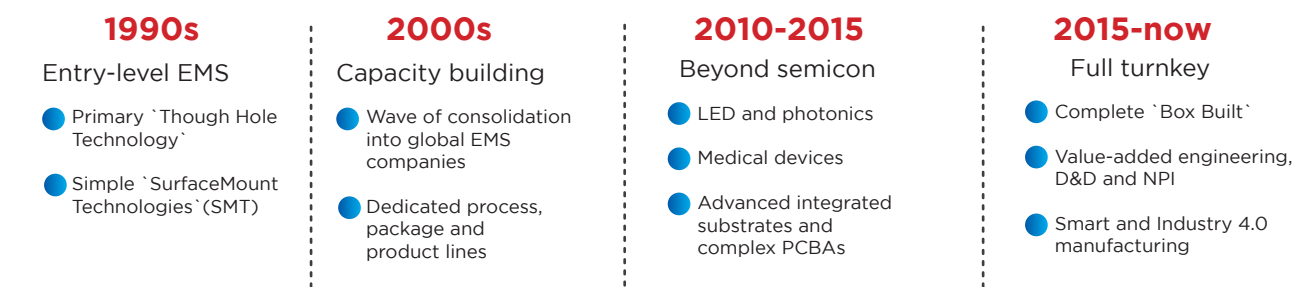


ELECTRONICS MANUFACTURING SERVICES (EMS)

EMS companies are strategic partners to larger original equipment manufacturers (OEMs), offering end-to-end manufacturing solutions via the assembly of products/modules and providing contract manufacturing services to clients. They have since become turn-key providers, offering a variety of value-added engineering services such as D&D and new product introduction. These companies offer a full range of integrated vertical capabilities, from conceptualisation and software development to product design and development. Today, EMS companies manufacture a broad range of equipment across various industries, including medical, aerospace, oil and gas, automotive, and information and communications technology (ICT).



Evolution of EMS Companies



Services (EMS) Companies in Malaysia



Early Stages

- Contract manufacturers
- Low mix, high volume production, eg. PCBAs
- Advantages:
 - Economies of scale
 - Production flexibility
- Disadvantages:
 - Low value-add
 - Labour intensive
 - Low profit margin
 - High risk

Today

- Vertical capabilities from conceptualisation, software and design to product development
- Equipment manufacturers for applications in medical, aerospace, oil and gas, automobile and ICT

Flex
 Celestica
 Jabil
 Plexus
 Sanmina
 Naticgate
 Kitron Electronics Manufacturing



E&E-RELATED ASSOCIATIONS AND CHAMBERS OF COMMERCE

The E&E industry is represented by a number of related associations that cooperate with the chambers of commerce, which, in turn, represent industry players as part of the overall ecosystem. These chambers of commerce and trade associations, together with other industry-specific groups, also provide venues for information sharing, develop relevant standards, promote the industry’s interests, and formulate codes of conduct and best practices.

MIDA collaborates with these associations and chambers of commerce in organising supply chain programmes, business-matching services, and facilitating plans for the expansion and growth of the E&E industry. Progressively, MIDA works closely with these stakeholders, gathering feedback to shape and formulate effective policy advocacy and strategy.

Industry Association

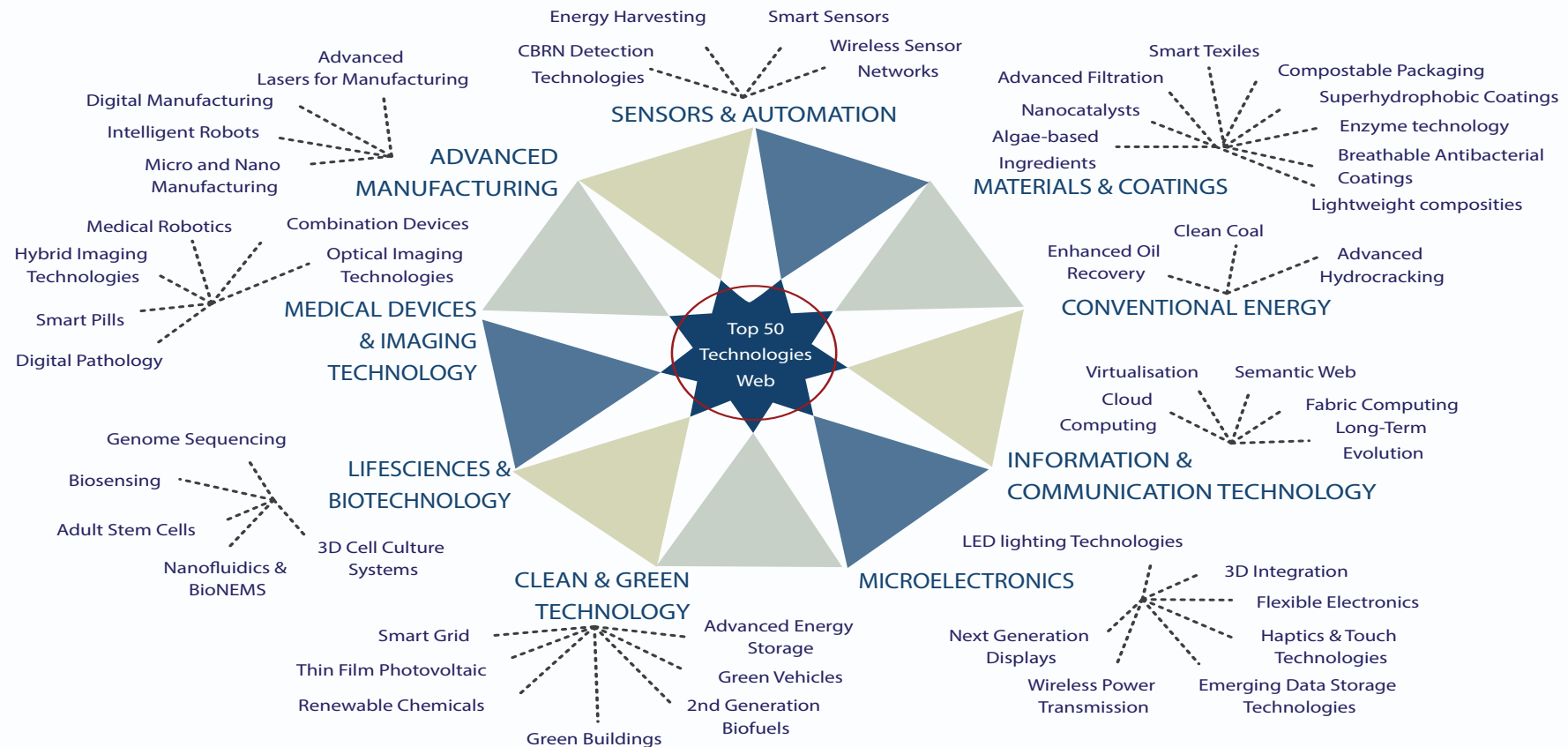
Semiconductor Foundry Association Malaysia (SFAM)	The Electrical and Electronics Association of Malaysia (TEEAM)	Malaysian Integrated Chip Designer Association (MICDA)
Malaysian Alternative & Renewable Industry (MARI)	Malaysian Photovoltaic Manufacturers Association (MPMA)	Malaysian Photovoltaic Industry Association (MPIA)
Malaysia Cable Manufacturers Association (MCMA)	Malaysia Bumiputera Solar Manufacturer Association (BUSFA)	Malaysian Air- Conditioning & Refrigeration Association (MACRA)
Malaysian Semiconductor Industry Association (MSIA)	Malaysian Integrated Chip Designers	

Chambers of Commerce

The Japanese Chamber of Trade and Industry Malaysia (JACTIM)
Malaysian-German Chamber of Commerce and Industry (MGCC)
Malaysian American Electronics Industry Association (MAEI) (under the American Malaysian Chamber of Commerce (AMCHAM))

DEVELOPMENTS IMPACTING GLOBAL INDUSTRY

The convergence of nanotechnology, biotechnology, and information sciences is driving the development of new products, particularly in advanced manufacturing for medical devices, imaging technology, ICT, and clean and green technology. These industries, among others, have benefited from advancements in the top 50 technologies, including digital and smart manufacturing, cloud computing, advanced energy storage, smart textiles, and flexible electronics.



Source: Frost & Sullivan, Techvision Report

SUSTAINABLE E&E TALENT POOL

The rapid evolution of technology megatrends is reshaping the global skills map. The Malaysian Government has prioritised developing a sustainable talent pool to meet the industry's growing needs by emphasising science, technology, engineering, and mathematics (STEM) education at all levels. This long-term strategy aims to foster interest in STEM subjects, supporting the E&E industry by cultivating a steady pipeline of STEM graduates equipped to drive growth in areas such as IC design.

VIBRANT LOCAL ECOSYSTEM AND SUPPLY CHAIN

Increasing investments into the E&E industry necessitates a strategy aimed at nurturing and growing Malaysian champions (LLCs and SMEs alike) and attracting a diverse range of MNC and EMS companies. MIDA's extensive promotional efforts in this space are designed to bring in companies that engage in higher value-added activities such as R&D specialists, companies with new and emerging technologies, and those integrated into the global supply chain. One such effort is the E&E Directory, which provides an online listing of Malaysia's E&E companies across all subsectors and segments.

Companies that can fill the gaps within the identified ecosystems (i.e. targeted E&E subsectors) are also being encouraged to invest in Malaysia.

<https://ee.mida.gov.my/>



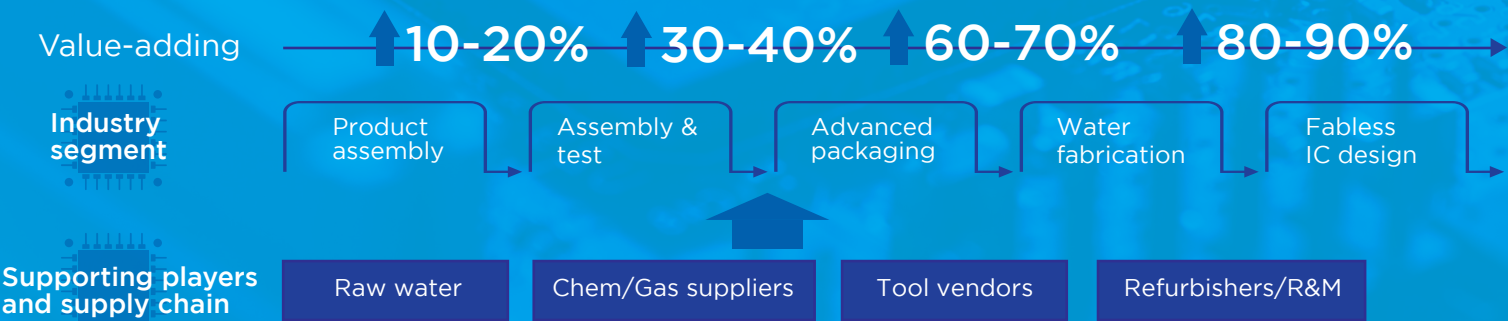
OPPORTUNITIES IN E&E SUBSECTORS: SEMICONDUCTORS; LED; SOLAR

SEMICONDUCTORS

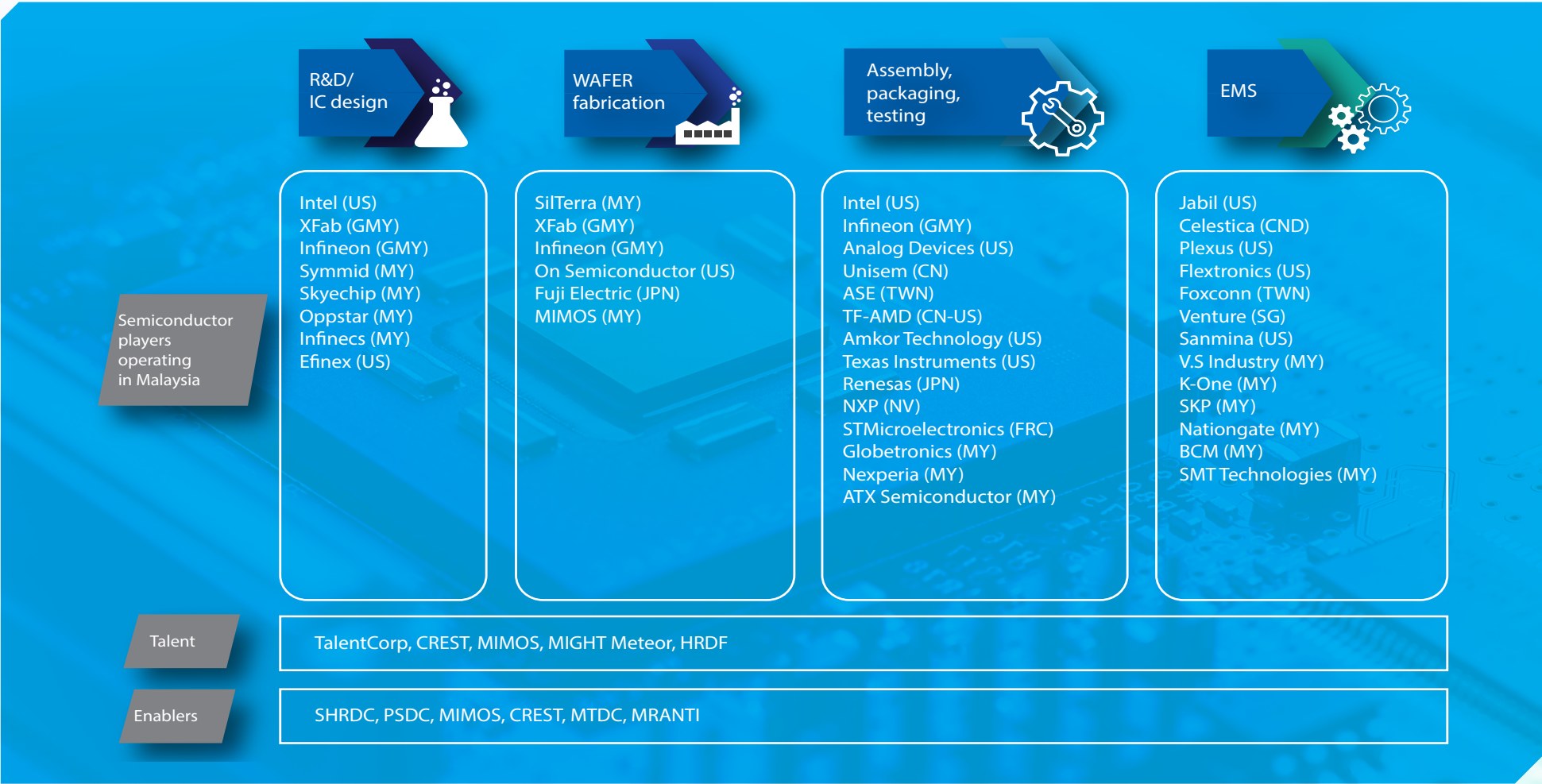
- Semiconductors are a key enabling technology for many applications, including the Internet of Things (IoT), automotive, medical, industrial, transportation, aerospace, and energy applications
- Malaysia has strong back-end capabilities (i.e. IC packaging and testing)
- 5 out of 10 of the largest semiconductor companies currently operate in Malaysia
- Key segments: automotive electronics, sensors, actuators, and communications chips
- Many semiconductor operations in Malaysia have upgraded their facilities into integrated manufacturing centres that fuse their manufacturing activities with R&D, product D&D, marketing, and distribution activities
- Some companies have even established their global hubs, global excellence centres, control towers, global delivery centres, global fulfilment centres, and shared services centres in Malaysia

The Malaysian semiconductor ecosystem - filling-up the gaps of the value-chain and the supply-chain

In the last 40 years, Malaysia has developed an industrial base across the entire semiconductor value chain populated by local players and multinationals



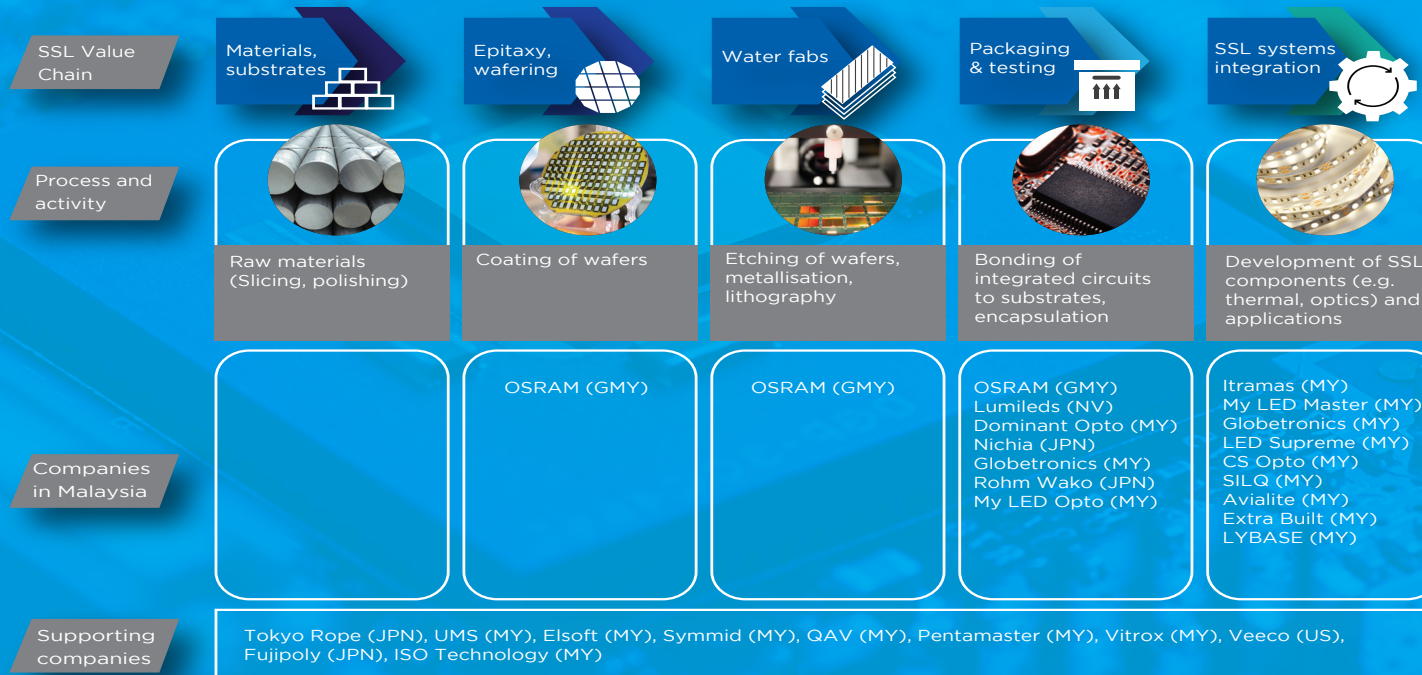
OVERVIEW: SEMICONDUCTOR ECOSYSTEM



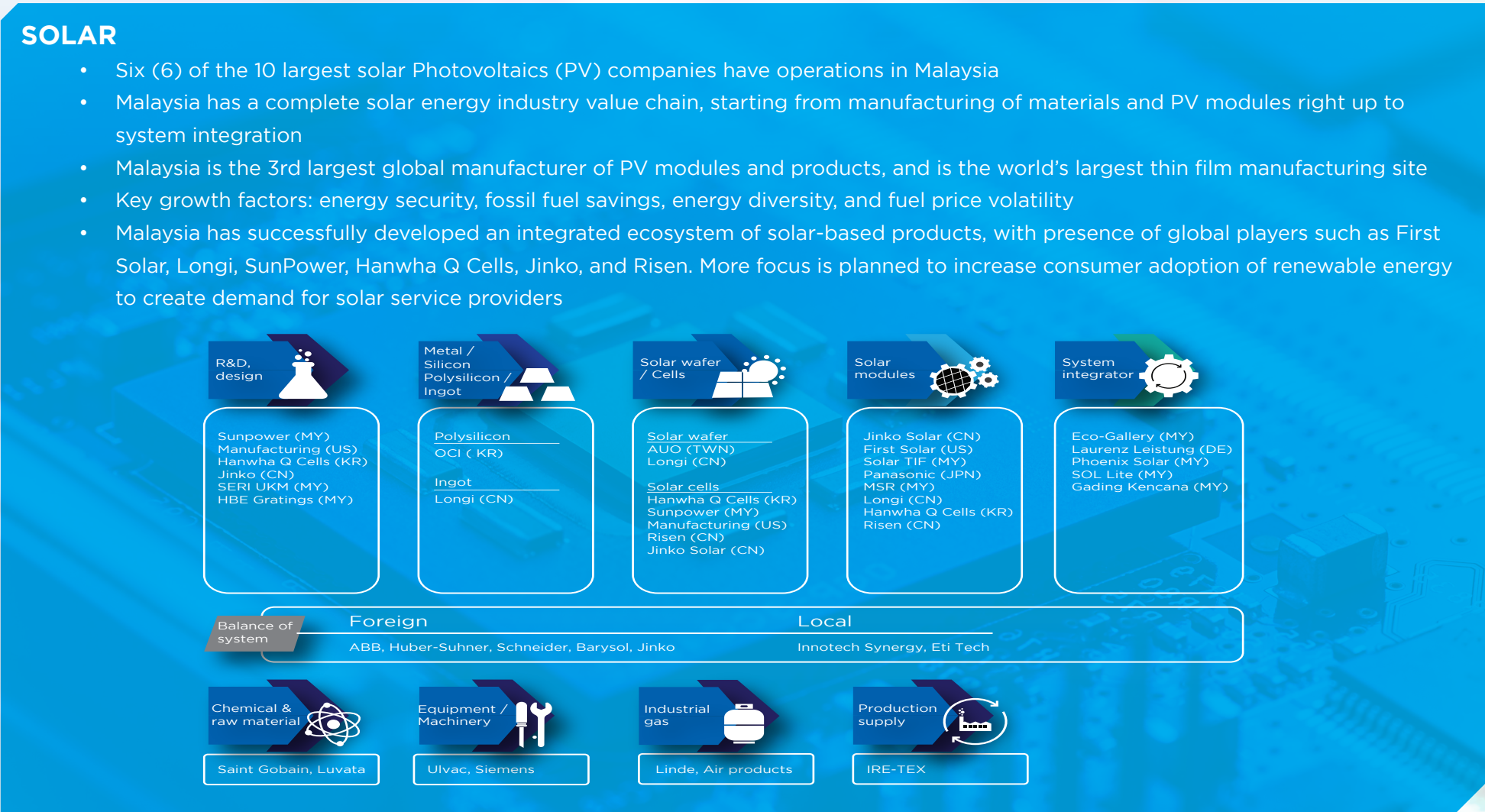
OVERVIEW: LED

LED

- The global market for solid-state lighting is estimated to grow from USD17.165 billion in 2022 to USD24.52 billion by 2023 according to Research Reports World, with a compound annual growth rate (CAGR) of 6.12% during the period until 2028
- Three (3) out of the five (5) largest LED companies have operations in Malaysia
- Malaysia is strong in automotive lighting through the presence of Lumileds and OSRAM
- Growth areas: industrial lighting, automotive lighting, commercial lighting and architectural lighting
- Opportunities exist in front-end activities such as LED wafer fabrication; and materials and substrate and epitaxy manufacturing



OVERVIEW: SOLAR



DECIDE TODAY TO INVEST IN MALAYSIA

Malaysia's market-oriented economy – coupled with its young, educated workforce, and the government's commitment to maintaining a business-friendly environment – has been a key driver in attracting investments into the country's electronics sector.

Strategically located with well-developed infrastructure

Malaysia offers a cost-competitive platform for investors looking to set up offshore operations for the manufacturing of advanced E&E products and services. Malaysia's central location in the heart of ASEAN also makes it a cost-efficient hub, with excellent land connectivity and numerous airports and seaports that provide seamless access to Southeast Asia's regional market of over 600 million people.

Providing access to global markets

Malaysia has signed a total of 18 Free Trade Agreements (FTAs), offering manufacturers preferential access to a wide range of export markets. The seven bilateral FTAs include Japan, Pakistan, New Zealand, India, Chile, Australia, and Turkey. As part of the Association of Southeast Asian Nations (ASEAN), Malaysia is also a signatory to nine regional FTAs, including AFTA, ASEAN-China, ASEAN-Korea, ASEAN-Japan, ASEAN-Australia-New Zealand, ASEAN-India, ASEAN-Hong Kong, the Regional Comprehensive Economic Partnership (RCEP), and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). Additionally, Malaysia is a party to two partial scope preferential trade agreements: the Framework Agreement on Trade Preferential System among the Member States of the Organisation of the Islamic Conference (TPS-OIC) and the D-8 Preferential Tariff Agreement (D-8 PTA), further expanding its trade network. These agreements enhance Malaysia's trade competitiveness and open access to key markets across the globe.

Prioritising business-friendly policies

Malaysia has signed Investment Guarantee Agreements (IGAs) with more than 60 countries. These IGAs provide foreign investors with favourable legal rights and protections in order to encourage greater levels of Foreign Investment (FI).

Fostering liberalised equity ownership

Malaysia allows all foreign investors to own up to 100% equity in any corporation established in the manufacturing sector (including the E&E industry).

Fostering research facilities/incubators and standards bodies

Malaysia is home to several world-class applied research and certification organisations.

Companies that are keen to explore applied research opportunities to boost corporate productivity can partner with the Malaysian Institute of Microelectronic Systems (MIMOS) in these key areas:

- | | |
|---------------------------|-----------------------|
| » Information security | » User experience |
| » Photonics | » Advanced computing |
| » Intelligent informatics | » Nanoelectronics |
| » Artificial intelligence | » Wireless innovation |
| » Microelectronics | |

Launched in 2012, the Collaborative Research in Engineering and Science and Technology Centre (CREST) was formed to grow Malaysia's E&E research, development, and commercialisation ecosystem through market-driven collaborative R&D and talent

development. CREST collaborates with companies and academia in the following technology clusters:-

- > LED/Optoelectronics
- > IoT & embedded systems
- > IC Design, test, & validation
- > Advanced material & packaging
- > Industry 4.0
- > Drones & autonomous vehicles

Malaysia guarantees intellectual property protection

When it comes to IP rights, Malaysia's laws conform to international standards. It is a member of the World Intellectual Property Organisation. Malaysia is also a signatory of the Paris Convention and Berne Convention – which govern IP rights – as well as a signatory to the Agreement on Trade-Related Aspects of IP Rights under the World Trade Organisation.

Malaysia allows maximum repatriation of income

Malaysia places no restrictions on the repatriation of capital, interest, dividends, or profits.

Facilitating employment of expatriates

In the event that local personnel do not possess the relevant skill sets or technical know-how required in any particular capacity, foreign investors may appoint expatriates in two categories:

1. Key Post (posts that are permanently filled by foreigners)
2. Term Post (posts that are filled by foreigners for a period of 1-5 years)

HOW MIDA HELPS SMOOTH OUT YOUR INVESTMENT JOURNEY IN MALAYSIA

Obtaining applicable financial/monetary/tax incentives

A corporate tax rate of 24% applies to all companies in Malaysia, regardless of ownership. A wide range of tax incentives are available to these companies and are constantly reviewed by the Government to ensure that these incentives maintain their competitive edge in the global marketplace.

MIDA can help you understand your eligibility for various financial, monetary, and tax incentives, as well as facilitate your applications for them.

- ✓ Pioneer status
Income tax exemption ranging from 70% to 100% for a period of 5 or 10 years
- ✓ Investment tax allowance
60% or 100% on qualifying capital expenditure for 5 years
- ✓ Reinvestment allowance
60% on qualifying expenditure for 15 consecutive years
- ✓ Import duty exemption
For raw materials/components and machinery and equipment

Expediting approvals of applications and permits

- ✓ Manufacturing licences
- ✓ Status approvals (Representative/Regional office/R&D)
- ✓ Matching grants
- ✓ Expatriate posts
- ✓ Customs duty exemptions
- ✓ Implementation via MIDA state offices/State agencies/Local authorities

Facilitation of various processes:

- ✓ Attracting the right talent
- ✓ Post-investment issues
- ✓ Engineering support services (e.g. fabrication, mould and die, machining, and surface engineering)
- ✓ Sourcing from local manufacturers for cost management and to shorten supply chains
- ✓ Technology collaboration through partnerships with SIRIM, CREST, MIMOS, and other research centres
- ✓ Bringing companies and funding sources (e.g Banks/fund managers) together via the investment coordination platform team

NEXT STEPS FOR YOUR INVESTMENT

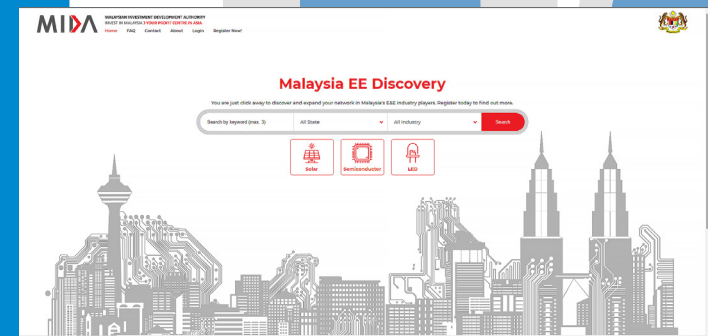
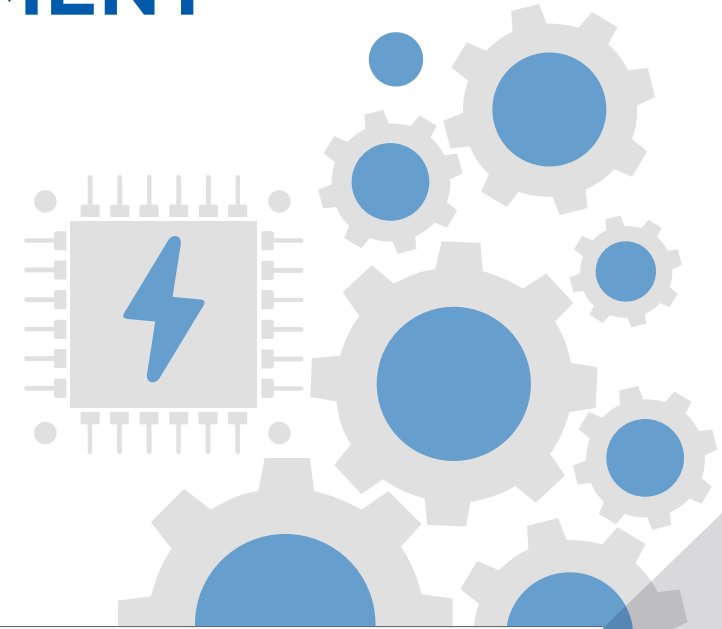
Learn more about Malaysia's E&E industry players

Together with our partners MATRADE, National Digital Department, SME Corp, and MPC, MIDA has been spearheading initiatives to connect local companies and SMEs to MNCs and LLCs through multiple platforms.

The E&E Directory is our latest digital platform and is the sole platform that concentrates on the Malaysian E&E landscape. Created in partnership with Malaysian E&E industry players, the E&E directory is a comprehensive web database that showcases participating companies' various capabilities, products and service offerings. The directory aims to promote and connect all E&E companies in Malaysia to enhance their market penetration domestically and globally, as well as facilitate the exploration of new business opportunities within the existing ecosystem.

This directory serves as an official reference which MIDA uses to recommend reputable Malaysian companies to MNCs and foreign investors looking to build strong domestic supply chains. MIDA and other related agencies also refer to it for use in promotional tools, as a reference for outsourcing or joint venture inquiries, as well as for market penetration initiatives.

The directory features an interactive Malaysian map that pinpoints the precise locations of the companies in the database. Other features include being able to identify companies of interest according to the target ecosystem or target industry cluster within the E&E domain.



<https://ee.mida.gov.my/>

SUCCESS STORIES



SUCCESS STORIES

SYMMID CORPORATION SDN. BHD.



An ISO 9001-certified and Malaysia-based fabless semiconductor design company, Symmid Corporation Sdn. Bhd. is a preferred partner for many leading semiconductor companies in Europe, the USA, and Asia. The company provides end-to-end IC design services to fabless design houses, electronics and semiconductor system companies, equipment manufacturers, and service providers.

With MIDA's financing facilitation, the company has been able to purchase technological assets, build more facilities, conduct R&D, and provide technical training for its IC design engineers.

INTEL MICROELECTRONICS (M) SDN. BHD.



With MIDA's support, Intel Microelectronics (M) Sdn. Bhd. (Intel) carried out various R&D projects, which have in turn produced highly skilled engineers and talent for the semiconductor sector. In addition to that, Intel's presence in Malaysia has also symbiotically benefited the local SMEs by

enhancing their capabilities in the country. Various vendor development programmes have integrated these local SMEs into Intel's global supply chain.



USEFUL ADDRESSES | MIDA STATE OFFICES | MALAYSIAN INVESTMENT DEVELOPMENT AUTHORITY

KEDAH & PERLIS

Director

Malaysian Investment Development Authority
Level 4, East Wing, No. 88
Menara Bina Darulaman Berhad
Lebuhraya Darulaman, 05100 Alor Setar
Kedah Darul Aman, Malaysia
Tel: (604) 731 3978 | Fax: (604) 731 2439
E-mail: kedah@mida.gov.my

PULAU PINANG

Director

Malaysian Investment Development Authority
Unit 14.01, 14th Floor, Menara Boustead Penang
39, Jalan Sultan Ahmad Shah
10050 Pulau Pinang, Malaysia
Tel: (604) 228 0575 | Fax: (604) 228 0327
E-mail: penang@mida.gov.my

PERAK

Director

Malaysian Investment Development Authority
Level 4, Perak Techno Trade Centre (PTTC)
Bandar Meru Raya, Off Jalan Jelapang
P.O.Box 210, 30720 Ipoh, Perak Darul Ridzuan, Malaysia
Tel: (605) 5269 962 / 961 | Fax: (605) 5279 960
E-mail: perak@mida.gov.my

MELAKA

Director

Malaysian Investment Development Authority
Level 3, Menara MITC
Kompleks MITC, Jalan Konvensyen
75450 Ayer Keroh, Melaka, Malaysia
Tel: (606) 232 2878 | Fax: (606) 232 2875
E-mail: melaka@mida.gov.my

NEGERI SEMBILAN

Director

Malaysian Investment Development Authority
Suite 13.01 & 13.02, 13th Floor
Menara Zurich, 70200 Seremban
Negeri Sembilan Darul Khusus, Malaysia
Tel: (606) 762 7921 | Fax: (606) 762 7879
E-mail: nsembilan@mida.gov.my

JOHOR

Director

Malaysian Investment Development Authority
Unit 13-05, Tingkat 13, Menara Tabung Haji
Jalan Ayer Molek, 80888 Ibrahim International
Business District, Johor Darul Ta'zim, Malaysia
Tel: (607) 224 5500 / 226 5057
Fax: (607) 224 2360
E-mail: johor@mida.gov.my

PAHANG

Director

Malaysian Investment Development Authority
Tingkat 10 KLM, Menara Zenith
P.O.Box 178, Jalan Putra Square 6, Putra Square
25200 Kuantan, Pahang Darul Makmur, Malaysia
Tel: (609) 513 7334 | Fax: (609) 513 7333
E-mail: pahang@mida.gov.my

KELANTAN

Director

Malaysian Investment Development Authority
Level 5-C, Menara Pejabat Kelantan Trade Centre
Jalan Bayam, 15200 Kota Bharu
Kelantan Darul Naim, Malaysia
Tel: (609) 748 3151 | Fax: (609) 744 7294
E-mail: kelantan@mida.gov.my

SELANGOR

Director

Malaysian Investment Development Authority
Level 22, Wisma MBSA, Persiaran Perbandaran
40000 Shah Alam, Selangor, Malaysia
Tel: (603) 5518 4260 | Fax: (603) 5513 5392
E-mail: selangor@mida.gov.my

TERENGGANU

Director

Malaysian Investment Development Authority
Level 5, Menara Yayasan Islam Terengganu
Jalan Sultan Omar, 20300 Kuala Terengganu
Terengganu Darul Iman, Malaysia
Tel: (609) 622 7200 | Fax: (609) 623 2260
E-mail: terengganu@mida.gov.my

SABAH

Director

Malaysian Investment Development Authority
Lot D9.4 & D9.5, Tingkat 9, Block D
Bangunan KWSP Karamunsing
P.O Box 11915, 88100 Kota Kinabalu, Sabah, Malaysia
Tel: (6088) 211 411 / 230 411 | Fax: (6088) 211 412
E-mail: sabah@mida.gov.my

SARAWAK

Director

Malaysian Investment Development Authority
4th Floor, Bangunan Bank Negara Malaysia Kuching
Jalan Satok, P.O. Box 716
93714 Kuching, Sarawak, Malaysia
Tel: (6082) 254 251 / 237 484 | Fax: (6082) 252 375
E-mail: sarawak@mida.gov.my

USEFUL ADDRESSES | WORLDWIDE NETWORK | MALAYSIAN INVESTMENT DEVELOPMENT AUTHORITY

ASIA PACIFIC

SINGAPORE

Counsellor (Investment) / Director
High Commission of Malaysia
Malaysian Investment Development Authority
No. 7, Temasek Boulevard, 26 - 01
Suntec Tower One, Singapore 038987
Tel: (65) 6835 9326 / 9580 / 7069
Fax: (65) 6835 7926
E-mail: singapore@mida.gov.my

JAPAN TOKYO

Director
Malaysian Investment Development Authority
32F, Shiroyama Trust Tower, 4-3-1, Toranomon
Minato-ku, Tokyo 105-6032, Japan
Tel: 81 (3) 5777 8808 | Fax: 81 (3) 5777 8809
E-mail: tokyo@mida.gov.my

OSAKA

Director
Malaysian Investment Development Authority
Mainichi Intecio 18F, 3-4-5 Umeda
Kita-ku, Osaka 530-0001, Japan
Tel: 81 (6) 6451 6661 | Fax: 81 (6) 6451 6626
E-mail: osaka@mida.gov.my

REPUBLIC OF KOREA

Counsellor (Investment) / Director
Embassy of Malaysia
(Malaysian Trade and Investment Centre)
Malaysian Investment Development Authority
17th Floor, Standard Chartered Bank Korea
Limited Building, 47, Jong-ro, Jongno-Gu
Seoul 03160, Republic of Korea
Tel: 82 (2) 733 6130/6131 | Fax: 82 (2) 733 6132
E-mail: seoul@mida.gov.my

AUSTRALIA

Consul (Investment) / Director
Consulate of Malaysia (Investment Section)
Malaysian Investment Development Authority
Level 6, 16 Spring Street, Sydney N.S.W. 2000, Australia
Tel: 61 (02) 9251 1933
E-mail: sydney@mida.gov.my

TAIWAN

Director (Investment)
Malaysian Friendship & Trade Centre
Malaysian Investment Development Authority
12F, Suite A, Hung Kuo Building
No. 167, Tun Hua North Road
Song Shan District 10549, Taipei, Taiwan
Tel: 886 (2) 2718 6094 | Fax: (8862) 2514 7581
E-mail: taipei@mida.gov.my

INDIA

Consul (Investment) / Director
Consulate General of Malaysia (Investment Section)
Malaysian Investment Development Authority
81 & 87, 8th Floor, 3rd North Avenue, Maker Maxity
Bandra Kurla Complex, Bandra (E), Mumbai 400051, India
Tel: (9122) 2659 1155/ 1156 | Fax: (9122) 2659 1154
E-mail: mumbai@mida.gov.my

UNITED ARAB EMIRATES

Consul (Investment) / Director
Consulate General of Malaysia (Investment Section)
Malaysian Investment Development Authority
Unit 2205, 22nd Floor, Tower A
Business Central Tower, Dubai Media City
(P.O Box 502876) Dubai, United Arab Emirates
Tel: (9714) 4343 696 / 4343 697 | Fax: (9714) 4343 698
E-mail: dubai@mida.gov.my

PEOPLE'S REPUBLIC OF CHINA SHANGHAI

Consulate General of Malaysia
(Investment Section)
Malaysian Investment Development Authority
Units 808-810, Level 8, Tower 1
Shanghai Kerry Centre
No. 1515, Nanjing Road (West)
Shanghai, 200040
People's Republic of China
Tel: 86 (21) 6289 4547
Fax: 86 (21) 6279 4009
E-mail: shanghai@mida.gov.my

GUANGZHOU

Director
Malaysian Investment Development Authority
Unit 1804B-05, CITIC Plaza Office Tower
233 Tianhe Bei Road Guangzhou
510610, People's Republic Of China
Tel: (8620) 8752 0739
Fax: (8620) 8752 0753
E-mail: guangzhou@mida.gov.my

BEIJING

Counsellor (Investment) / Director
Embassy of Malaysia
(Investment Section)
Malaysian Investment Development Authority
Unit C, 12th Floor, Tower A, Gateway Plaza
No.18 Xiaguangli, East Third Ring North Road
Chaoyang District, 100600 Beijing
People's Republic Of China
Tel: (8610) 8440 0071 / 0072
Fax: (8610) 8440 0076
E-mail: beijing@mida.gov.my

EUROPE

UNITED STATES OF AMERICA

FRANCE

Director

Malaysian Investment Development Authority

42 Avenue Kleber, 75116 Paris, France

Tel : (331) 4727 6696 / 3689

E-mail: paris@mida.gov.my

**GERMANY
FRANKFURT**

Consul (Investment) / Director

Consulate General of Malaysia (Investment Section)

Malaysian Investment Development Authority

Level 9, HAT 64, Bleichstrasse 64-66

60313 Frankfurt Am Main, Germany

Tel: (4969) 8700 679-0

Email: frankfurt@mida.gov.my

MUNICH

Director

Malaysian Investment Development Authority

Level 6, Bürkleinhaus, Bürkleinstrasse 10

80538 Munich, Germany

Tel: (4989) 2030 0430 | Fax: (4989) 2030 0431-5

E-mail: munich@mida.gov.my

ITALY

Deputy Director

Consulate of Malaysia (Investment Section)

Malaysian Investment Development Authority

2nd Floor, Via Alberico Albricci, 9

20122 Milan (MI), Italy

Tel: (3902) 8909 3824 | Fax: (3902) 8909 5418

E-mail: milan@mida.gov.my

SWEDEN

Deputy Director

Malaysian Investment Development Authority

c/o Embassy of Malaysia

Karlavaegen 37, P.O. Box 26053

S-10041 Stockholm, Sweden

Tel: (46) 8440 8400/ (46) 8440 8416

Fax: (46) 8791 8761

E-mail: stockholm@mida.gov.my

UNITED KINGDOM

Counsellor for Investment / Director

High Commission of Malaysia

Malaysian Investment Development Authority

17, Curzon Street, London W1J 5HR

United Kingdom

Tel: (4420) 7493 0616

Fax: (4420) 7493 8804

E-mail: london@mida.gov.my

TÜRKİYE

Consul (Investment) / Director

Consulate General of Malaysia

(Investment Section)

Malaysian Investment Development Authority

APA-GIZ Plaza, Büyükdere Caddesi

No: 191 Level: 12, No: 24

34330 Leventİstanbul / TÜRKİYE

Tel: +90212 905 11 00

E-mail: istanbul@mida.gov.my

SAN JOSE

Director

Malaysian Investment Development Authority

226 Airport Parkway

Suite 480, San Jose, California 95110

United States of America

Tel: (1408) 392 0617

E-mail: sanjose@mida.gov.my

CHICAGO

Director

Malaysian Investment Development Authority

John Hancock Center, Suite 1810

875, North Michigan Avenue, Chicago, IL 60611

United States of America

Tel: (1312) 787 4532

Fax: (1312) 787 4769

E-mail: chicago@mida.gov.my

NEW YORK

Consul (Investment) / Director

Consulate General of Malaysia

(Investment Section)

Malaysian Investment Development Authority

313 East, 43rd Street, New York, NY 10017

United States of America

Tel: (1212) 687 2491

Fax: (1212) 490 8450

E-mail: newyork@mida.gov.my



MALAYSIAN INVESTMENT DEVELOPMENT AUTHORITY

HEADQUARTERS

MALAYSIAN INVESTMENT DEVELOPMENT AUTHORITY

MIDA Sentral, No. 5, Jalan Stesen Sentral 5, Kuala Lumpur Sentral, 50470 Kuala Lumpur, MALAYSIA

Tel: (603) 2267 3633 | Fax: (603) 2274 7970 | E-mail: investment@mida.gov.my

Website: www.mida.gov.my

For more information, please contact:

ELECTRICAL & ELECTRONICS DIVISION

Malaysian Investment Development Authority

Level 28, MIDA Sentral, No. 5, Jalan Stesen Sentral 5, 50470 Kuala Lumpur, MALAYSIA

Tel : (603) 2263 2401 | Fax : (603) 2260 1641 | E-mail: investment@mida.gov.my

Website: www.mida.gov.my



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