

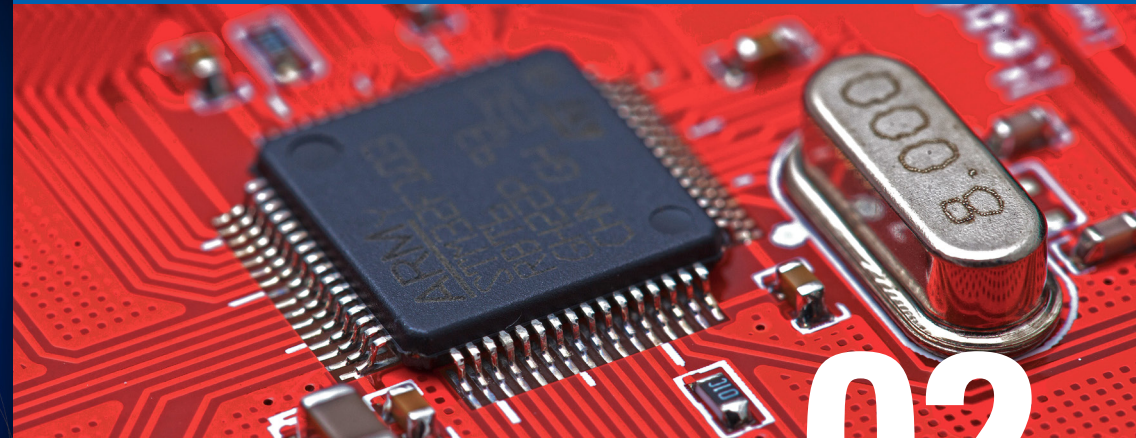
Malaysia's E&E Industry



- **Malaysia: A Global Electrical and Electronic (E&E) Products Powerhouse**

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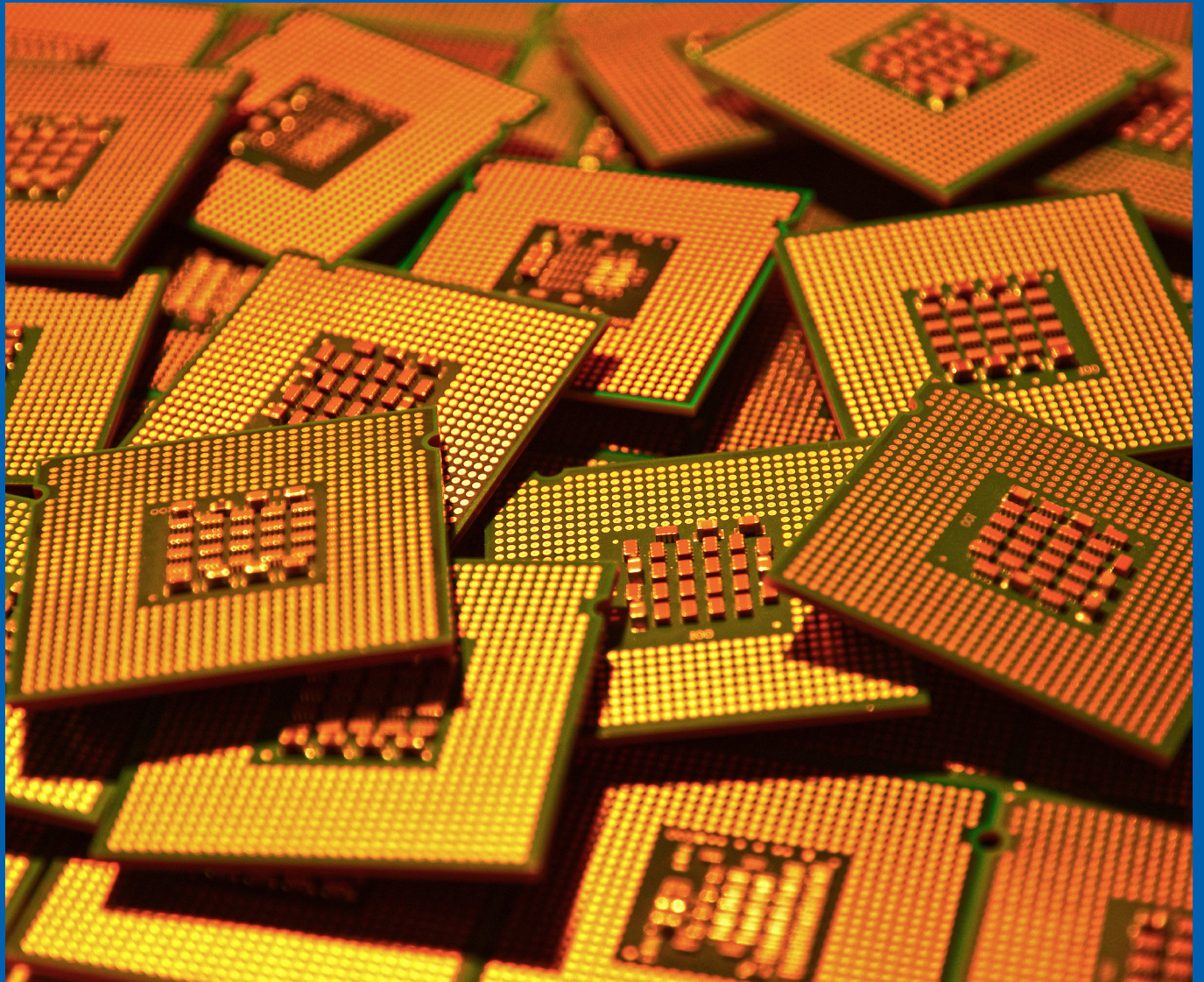
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E&E is a key driver of Malaysia's industrial development, contributing significantly to GDP growth, export earnings, investment, and employment, thus stimulating the growth of new economic clusters, particularly in relation to manufacturing-related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



Malaysia: A Global Electrical and Electronic Products Powerhouse

Records of a well-rooted industry

Malaysia's diverse electrical and electronic 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, of which major export destinations include Singapore, Hong Kong, the USA, PRC, Japan and Europe. Local industry champions operate alongside multinational companies (MNCs) from the USA, Japan, the Republic of China (Taiwan), the Republic of Korea, and a number of European countries, manufacturing products ranging from semiconductor devices to consumer and industrial electronics.

- **Clarion**
- **Advanced Micro Devices (AMD)**
- **Texas Instruments**
- **Agilent**
- **Osram**
- **Renesas**
- **Intel Malaysia**
- **Bosch**

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

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, the development of a pool of product design talent, and the training of employees who can address issues such as Intellectual Property (IP) protection, licensing, and R&D spending.

Five decades and beyond

**The
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.

**The
1980s**

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

**The
1990s**

Companies began to establish design and development (D&D) centres to engage in semiconductor packaging development, manufacturing process development, and design activities. Among the manufactured goods that dominated the era were office and computer equipment – including disks – to cater to the booming PC market demand.

2010

Malaysia moved up the value chain. To stay competitive, E&E factories evolved from high-volume, low-mix operations to high-mix, low-volume operations. Wafer fabrication companies continued to establish and expand their facilities in Malaysia, further positioning the nation among the global top E&E exporters catering to the 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 procurement centres, logistic centres, and OHQs in Malaysia. E&E manufacturers are currently exploring the business potential that can be derived from new growth areas such as E-Commerce, Automation, IoT, and AI, accelerating the move towards Industry 4.0 by society and industry alike. Today, IoT is pushing demand for more advanced semiconductor devices such as sensors, resistors, and transceivers, to help the industry to adopt digitisation and digitalisation aimed at improved productivity, profit, and competitiveness.

Future

The E&E manufacturing space is evolving, as more and more companies move into more knowledge-intensive, hi-tech, innovative, and higher-value-add activities. With the availability of a sophisticated talent pool – such as in the integrated circuit (IC) design segment – Malaysia is ready to shift forwards into the development of autonomous vehicles, smart machines, and robotics, among other things. AI provides huge future opportunities as the key technology that will drive the emergence of a fully-connected Industry 5.0 society and economy. AI's future dominance will help communities to make accurate decisions due to precise forecasting capabilities and business process optimisations. Future industry megatrends are forecast to be shaped heavily by the advancements made by Industry 4.0 pillars.

Evolution of Malaysia's Electronics Industry

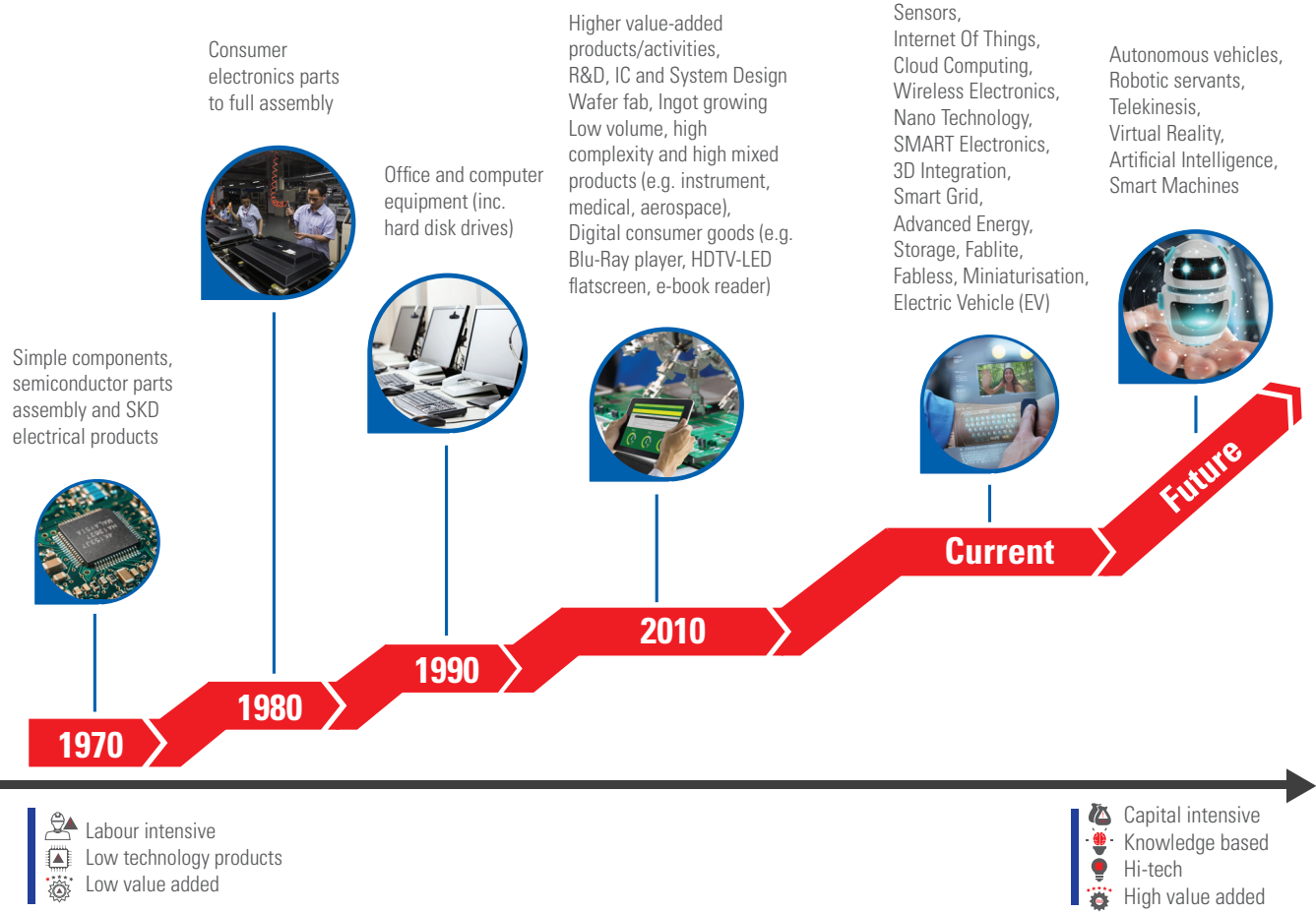
E&E industry in Malaysia:

Started in **1970**
with **8** companies

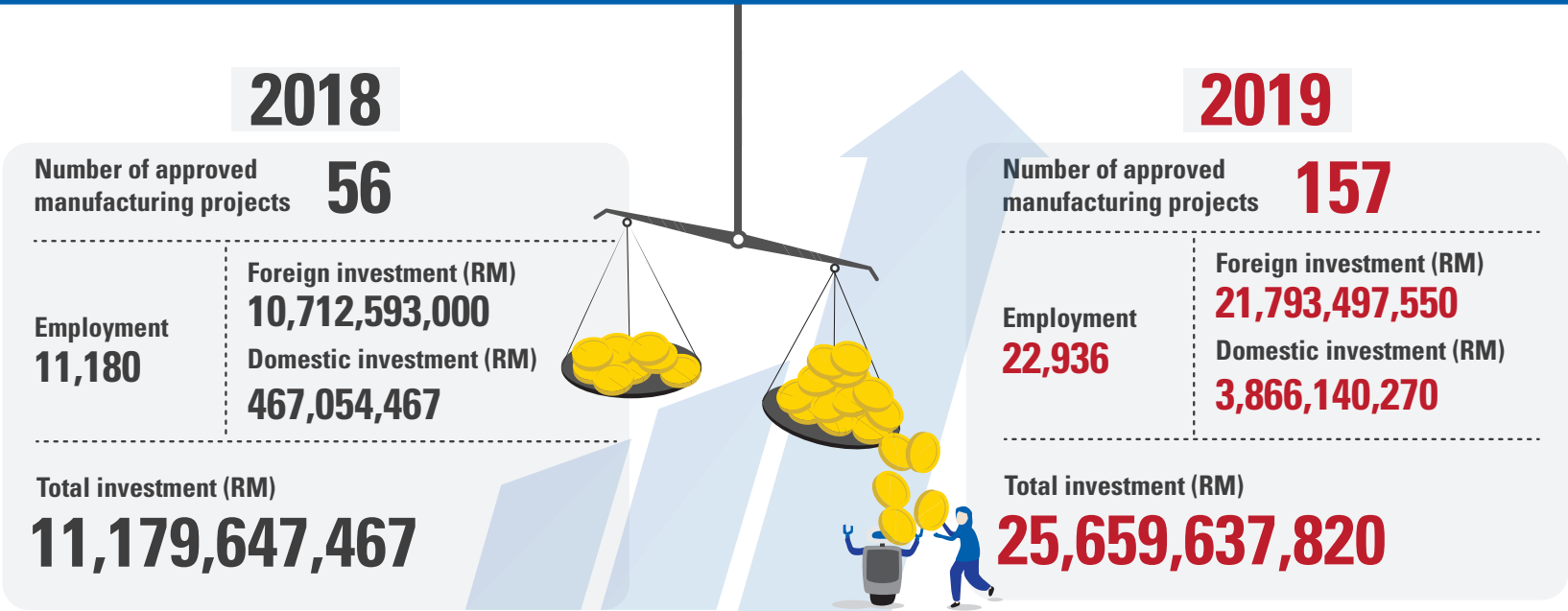
Consumer electronics:
Clarion and Bosch

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

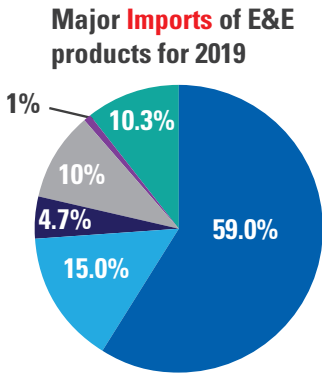
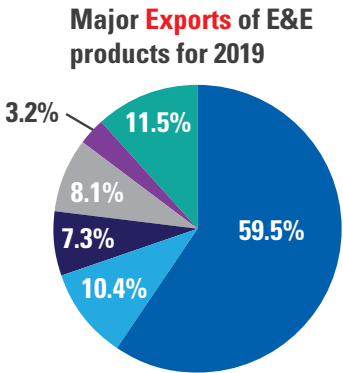
Malaysia ranks **7th**
in Global E&E exporters
(World Trade Atlas)



Factsheet: The E&E industry today



In 2019, the E&E sector continues to be the major contributor to Malaysia's export earnings, accounting for **RM372.67 billion** worth of exports, or **37.8%** of total exports



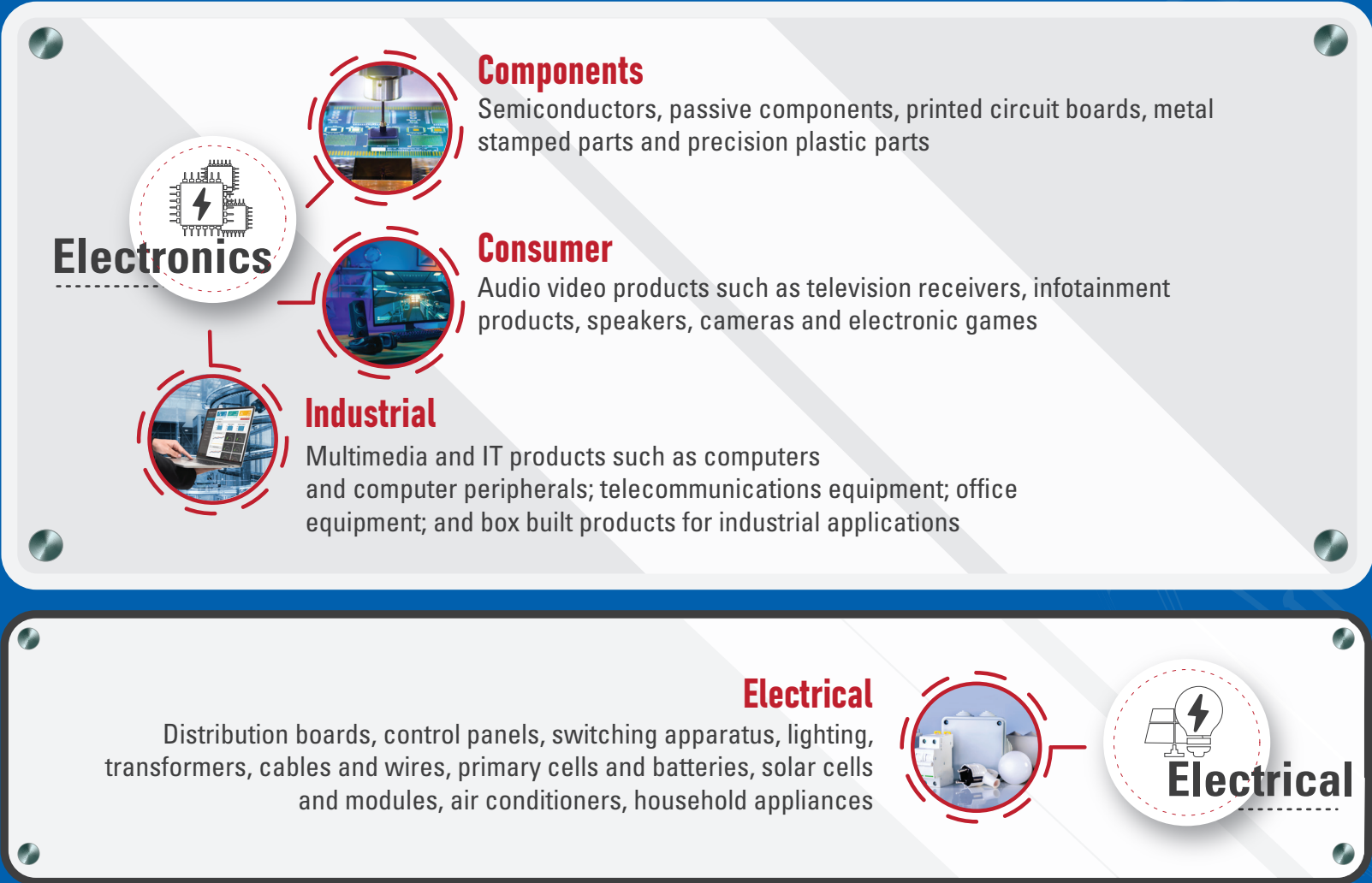
- Semiconductor devices, ICs, transistors, valves
- Electrical apparatus for electrical circuit & printed circuit
- Automated data processing
- Telecommunications equipment and parts
- Consumer products
- Others



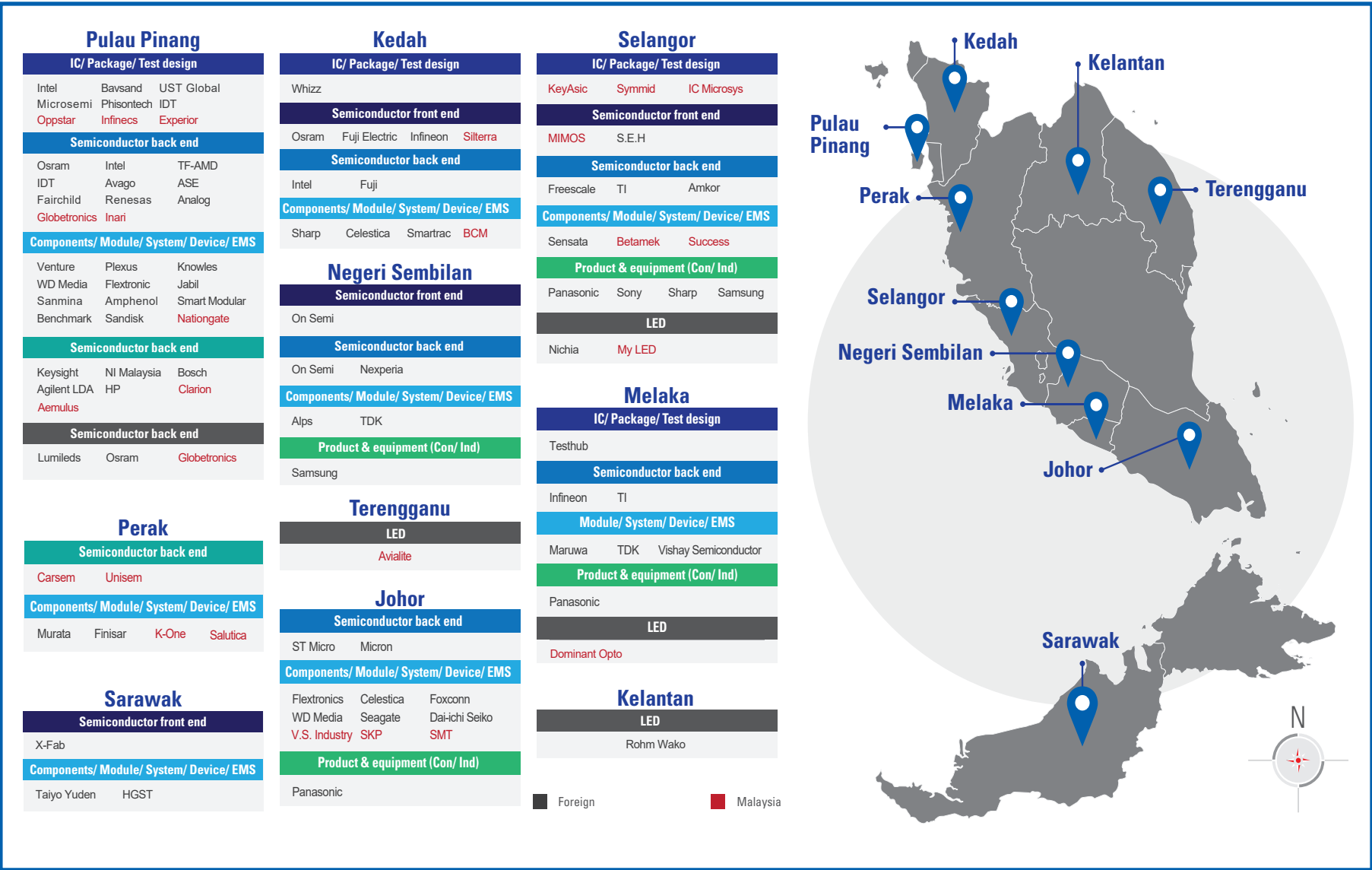
In 2019, the E&E sector continues to be the major contributor to Malaysia's export earnings, accounting for RM372.67 billion worth of exports, or 37.8% of total exports

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.



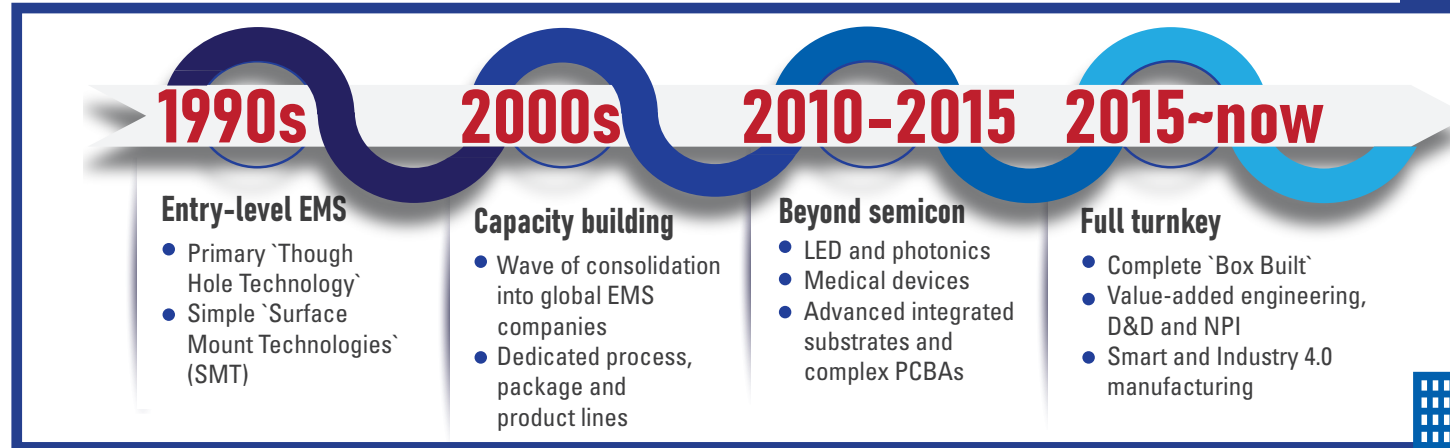
The diversification of the industry has led to several distinct E&E manufacturing clusters throughout the country:



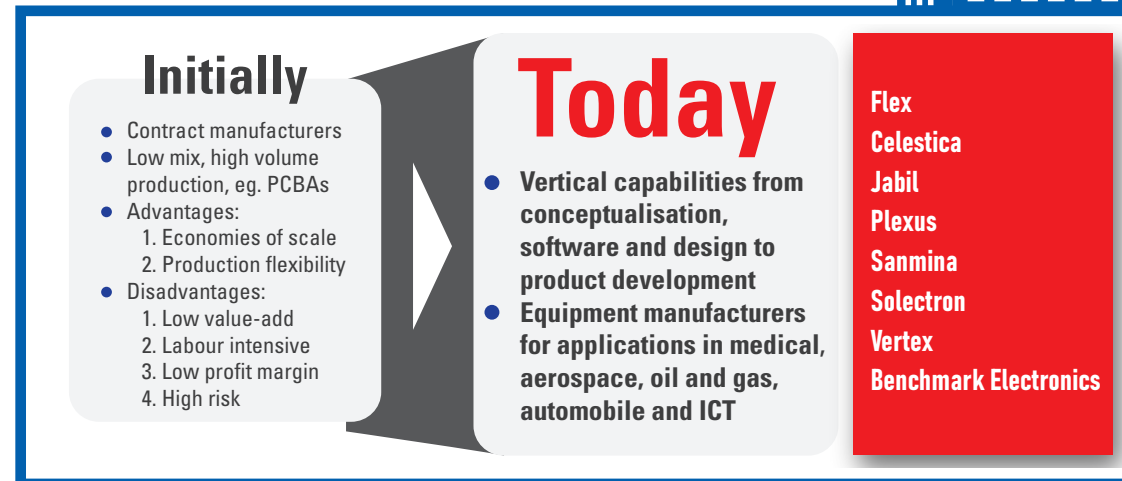
Electronic Manufacturing Services (EMS)

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 their clients. They have since become turn-key providers, offering a variety of value-added engineering services such as D&D and new product introduction. They offer a full range of integrated vertical capabilities, from conceptualisation and software to design and product 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



Electronic Manufacturing Services (EMS) Companies in Malaysia



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 that, 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 by collating feedback from these associations to formulate effective policy advocacy and strategy, supply chain programmes, plans to expand and grow the E&E industry, as well as business-matching services.

Industry Associations

Semiconductor Foundry Association Malaysia (SFAN)

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)

Chambers of Commerce

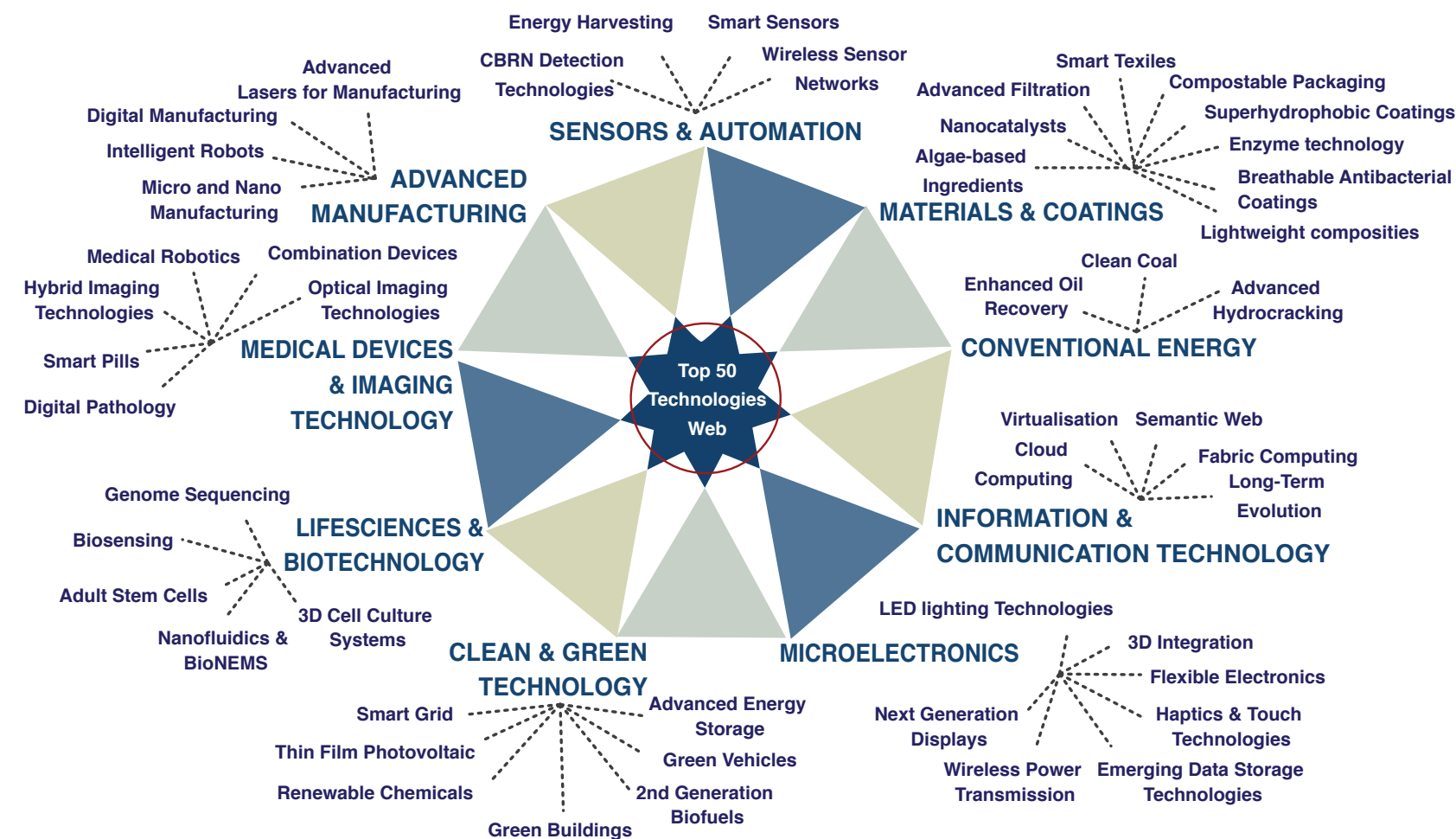
The Japanese Chamber of Trade and Industry Malaysia (JACTIM)

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 technology convergence of nanotech, biotech, and information sciences drives the creation of new products, particularly in the advanced manufacturing of medical devices and imaging technology; ICT; and clean and green technology. These industries and others have benefited from advances in the top 50 technologies, including digital and smart manufacturing, cloud computing, advanced energy storage, smart textiles, and flexible electronics.



Source: Frost & Sullivan, Techvision 2020 report



Sustainable E&E talent pool

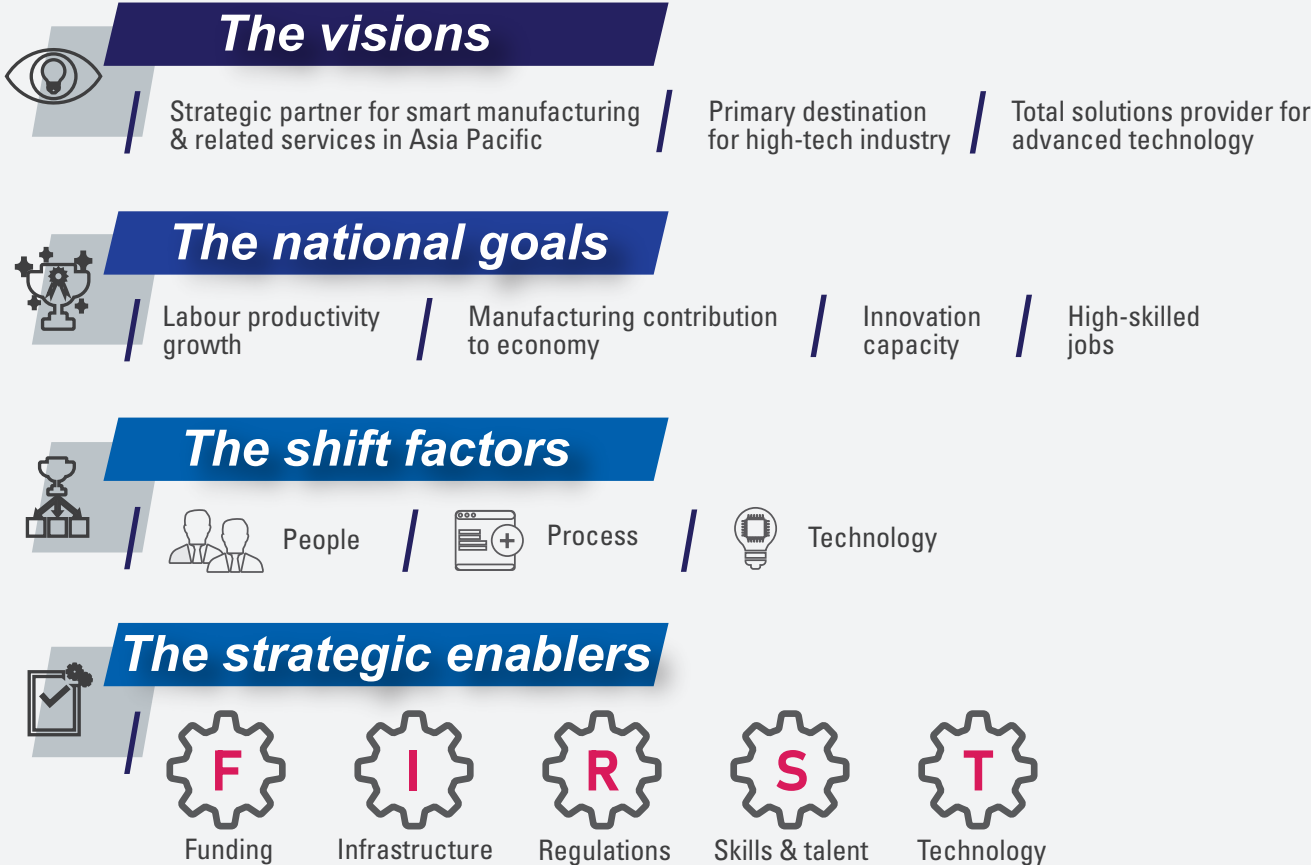
The rapid changes in technology megatrends are redrawing the skills map for industries globally. The Malaysian Government has prioritised creating a sustainable talent pool to match the industry's growing needs by emphasising science, technology, engineering, and mathematics (STEM) fields among students at all levels. This is a long-term strategy to inculcate interest in STEM subjects that will help the E&E industry, by producing a stable pool of STEM university graduates who will be able to support the growth of areas such as IC design.

The Post-School Finishing Programme in IC Design (PSFID) is a short-term collaboration platform between the Government, agencies, industry players, and academia designed to channel specialised talent towards meeting the needs for the E&E industry's upstream activities. Upon its completion, it is hoped that the universities will be able to produce IC designers organically via the Structured Industry Apprenticeship Program in IC under the Ministry of Higher Education's purview. The seamless integration between both programmes aims to ensure the effectiveness of strategies and action plans to the industry demand of at least 500 IC design trainees annually.

Embracing the Fourth Industrial Revolution (Industry 4.0)

The Malaysian Government, in cooperation with industry stakeholders, has undertaken efforts to scale up technological transformation through the adoption of technologies related to automation, smart manufacturing, and Industry 4.0. The aim is to have stakeholders commit to higher-value-added activities and integrate key Industry 4.0 technologies into their manufacturing and supply chain operations.

Industry4WRD: The Framework

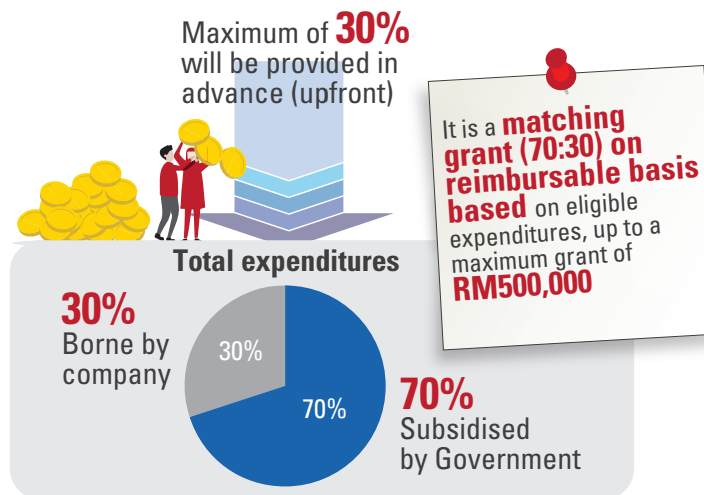


Industry4WRD Intervention Fund

The Industry4WRD Intervention Fund is a financial support facility for Malaysian Small and Medium Enterprises 'SMEs' in the manufacturing and related services sectors to embrace Industry 4.0.

The Fund is provided to support companies in implementing intervention projects based on the recommendation of Industry4WRD Readiness Assessment (RA) Report on the shift factors of people, process and technology.

The applications of this fund will be **evaluated by MIDA**.



Received upfront grant (maximum **30%**) from MIDA

The upfront grant to be utilised for the initial expenditures

The following expenditures to be borne by company

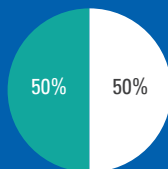
Claim the remaining grant from MIDA

Domestic Investment Strategic Fund (DISF)

- ◆ Introduced in Budget 2012
- ◆ Objective is to accelerate the shift of Malaysian-owned companies in targeted industries to higher-value-added, high technology, knowledge-intensive and innovation-based industries

Matching grant (50:50) on reimbursable basis for the eligible expenditures

50% Borne by company



50% Subsidised by Government

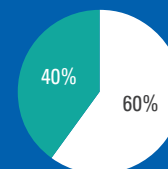
- ◆ Eligible to all companies with Malaysian equity ownership of at least 60%
- ◆ Effective date of application is from 3 July 2012 until 31 December 2020

Industry4WRD DISF

- ◆ Introduced in Budget 2019
- ◆ Objective is to assist companies that have undergone the Industry4WRD Readiness Assessment (RA) programme to migrate into Industry 4.0

Matching grant (60:40) on reimbursable basis for the eligible expenditures

40% Borne by company



60% Subsidised by Government

- ◆ Eligible only to companies that have undergone the Industry4WRD Readiness Assessment (RA) programme with Malaysian equity ownership of at least 60%
- ◆ Effective date of application is from the date of approval of Industry4WRD RA Report (MPC's letter) until 31 December 2021

Both funds are evaluated by MIDA

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 engaged in the global supply chain. One such effort is the E&E Directory, which lists Malaysia's E&E companies across all subsectors and segments online.

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

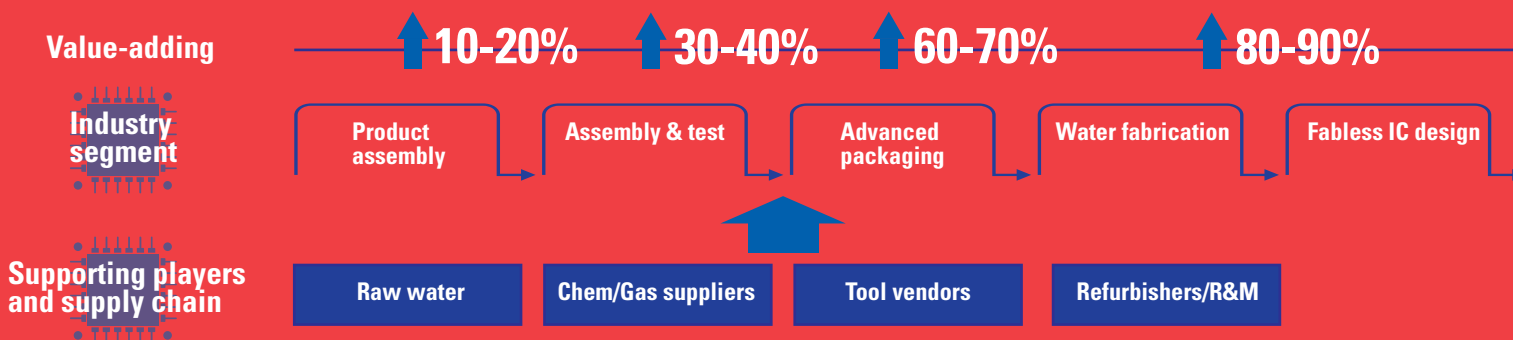
Opportunities in E&E subsectors: Semiconductors; LED; solar

Semiconductors

- **6 out of 12** of the largest semiconductor companies currently operate in Malaysia
- Key segments: automotive electronics, sensors, actuators, and communications chips
- Malaysia has strong back-end capabilities (i.e. IC packaging and testing)
- Semiconductors are a key enabling technology for many applications, including the Internet of Things (IoT), automotive, medical, industrial, transportation, aerospace, and energy applications
- 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



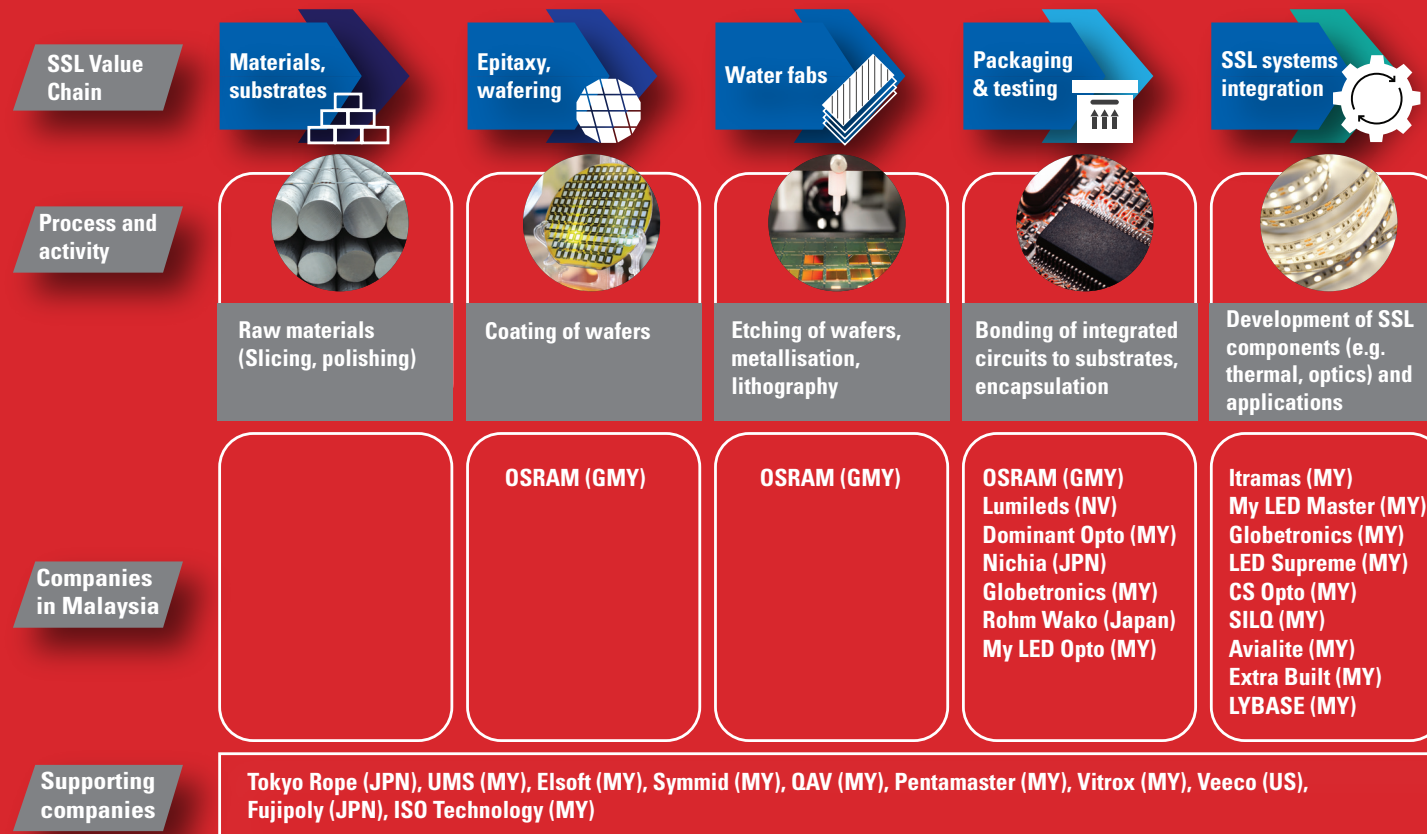
Overview: Semiconductor ecosystem



LED

- The global market for solid-state lighting is estimated to grow from **USD62.8 billion in 2018 to USD127.5 billion by 2023**, with a compound annual growth rate (CAGR) of 15.2% during that time
- **3 out of the 9** 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

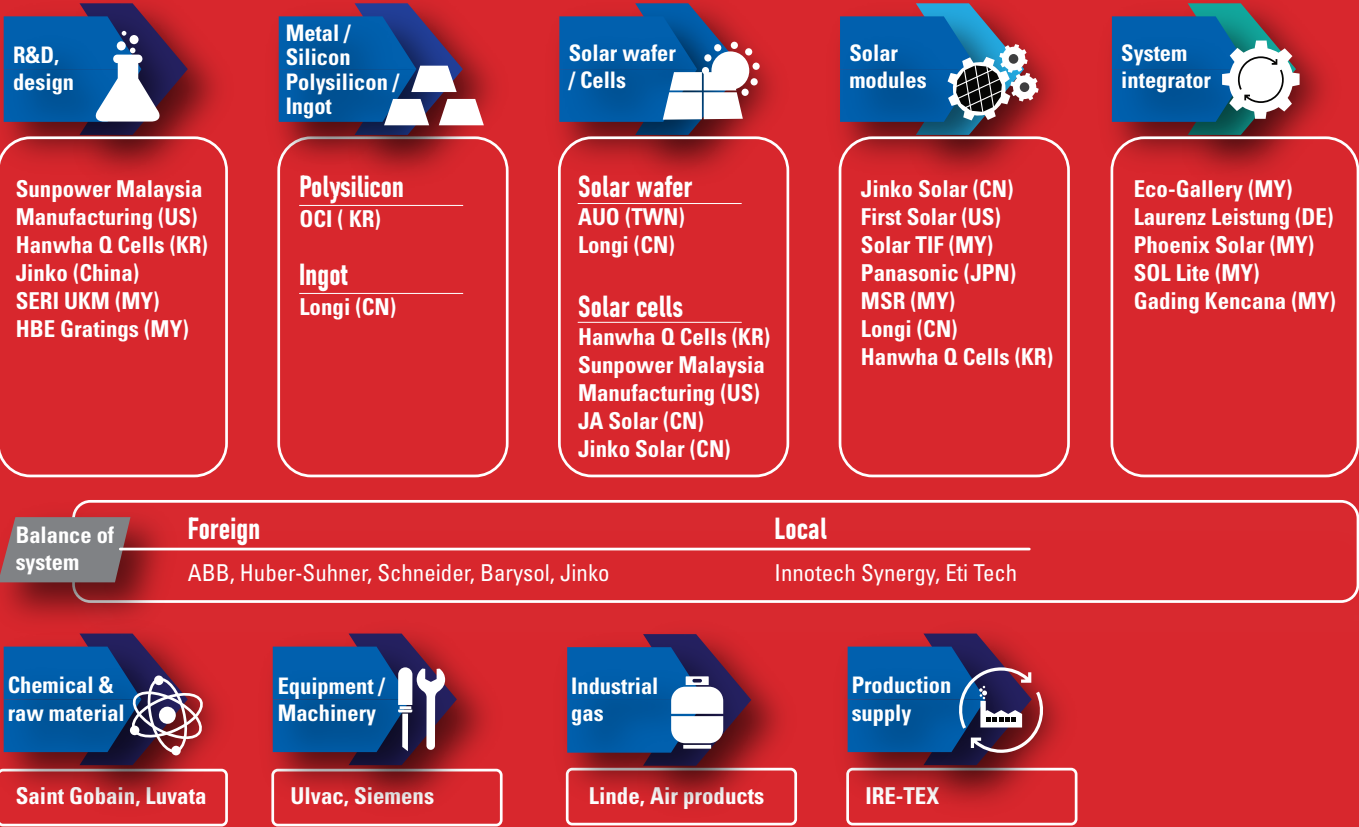
Overview: LED ecosystem



Solar

- **7 of the 11 largest** solar Photovoltaics (PV) companies have operations in Malaysia
- Malaysia has a complete solar energy industry value chain, starting from manufacturing of materials and PV modules right up to system integration
- Malaysia is the **3rd largest global manufacturer** of PV modules and products, and is the world's largest thin film manufacturing site
- Key growth factors: energy security, fossil fuel savings, energy diversity, and fuel price volatility
- Malaysia has successfully developed an integrated ecosystem of solar-based products, with presence of global players such as First Solar, Longi, SunPower, Hanwha Q Cells, Jinko, and JA Solar. More focus is planned to increase consumer adoption of renewable energy to create demand for solar service providers

Overview: Solar ecosystem



Decide Today to Invest in Malaysia

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

Strategically located with well-developed infrastructure

Malaysia's strategic location means it is able to offer a cost-competitive platform for investors intending 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 a plethora of airports and seaports that offer unparalleled access to Southeast Asia's regional market of over 600 million people.



Providing access to global markets

Malaysia has signed several bilateral free trade agreements (FTAs) that span the globe, providing manufacturers preferential access to these export markets. The seven bilateral FTAs include Turkey, Japan, Australia, Chile, India, New Zealand, and Pakistan. Meanwhile, as part of the Association of Southeast Asian Nations (ASEAN), Malaysia is also signatory to seven regional FTAs; namely, ASEAN-China, AFTA, ASEAN-Hong Kong, ASEAN-Australia-New Zealand, ASEAN-India, ASEAN-Japan, and ASEAN-Korea. Malaysia is also a signatory of the Regional Comprehensive Economic Partnership (RCEP), which is an FTA covering the entirety of ASEAN, as well as Australia, Japan, the PRC, the Republic of Korea, and New Zealand.



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)



Facilitating employment of expatriates

In the event that local personnel do not possess the relevant skillsets or technical knowhow required in any particular capacity, foreign investors may appoint expatriates in two categories:

1 Key posts

(posts that are permanently filled by foreigners)

2 Term posts

(posts that are filled by foreigners for a period of 1-5 years)



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 FDI.



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	Photonics	Intelligent informatics
Artificial intelligence	Microelectronics	User experience
Advanced computing	Nanoelectronics	Wireless innovation

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 allows for maximum repatriation of income

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



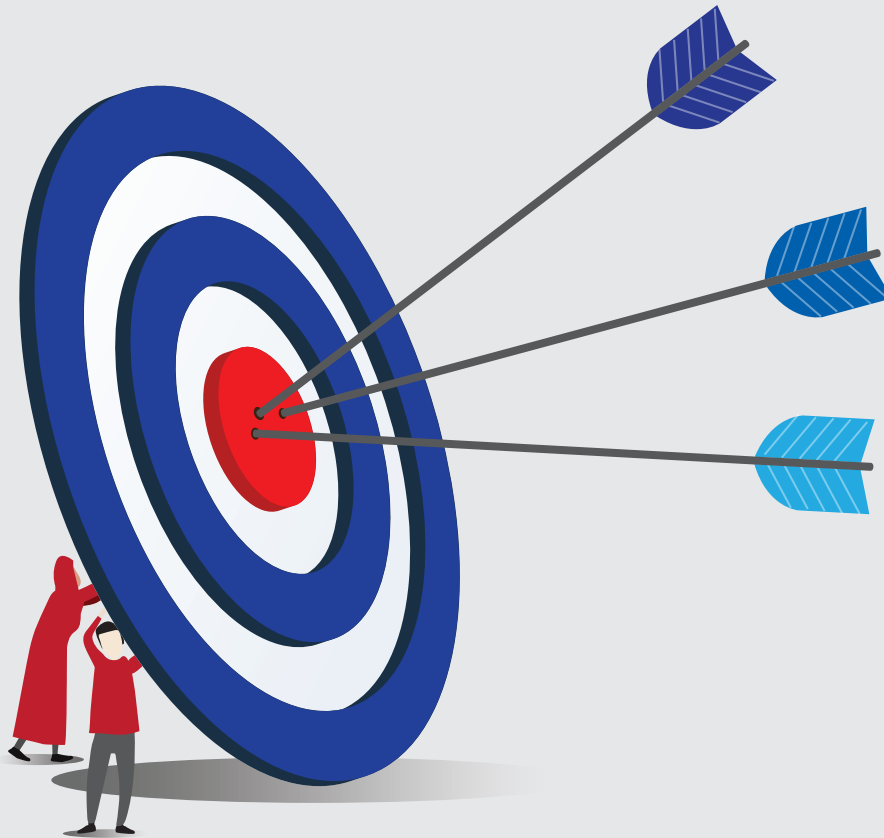
Malaysia guarantees intellectual property protection

When it comes to IP rights, Malaysian'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 of the Agreement on Trade-Related Aspects of IP Rights under the World Trade Organisation

- **WIPO**
World Intellectual Property Organization
- **World Trade Organization**
- **Berne Convention**

How MIDA Helps Smooth out Your Investment

Journey in Malaysia



Obtaining applicable financial/monetary/tax incentives

A corporate rate of 24% applies to all companies in Malaysia regardless of ownership. A wide range of tax incentives is made available to these companies and is 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



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.

More about Symmid Corporation Sdn Bhd's success story is available at <https://www.mida.gov.my/home/symmid-corporation-sdn-bhd/posts/>

Intel Microelectronics (M) Sdn Bhd

With MIDA's support, Intel Microelectronics (M) Sdn Bhd (Intel) carried out various R&D projects, which has 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.

See more of Intel's testimonial at <https://www.mida.gov.my/home/intelmalaysiatv3/posts/>

Next Steps for Your Investment

Learn more about Malaysia's E&E industry players

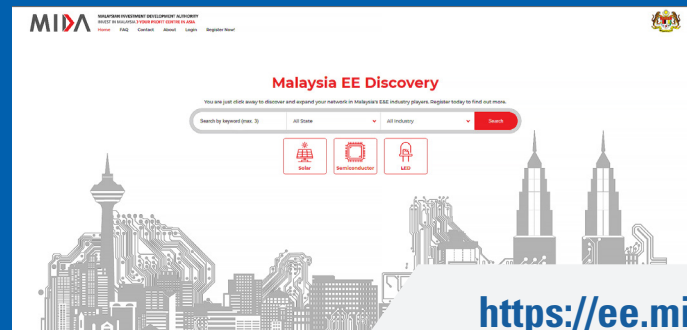
Together with our partners MATRADE, SME Corp, and MPC, MIDA has been spearheading initiatives to connect local companies and SMEs to MNCs and LLCs through multiple platforms. The E&E Directory is our latest digital platform and is the sole platform that concentrates on the Malaysian E&E landscape.

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.

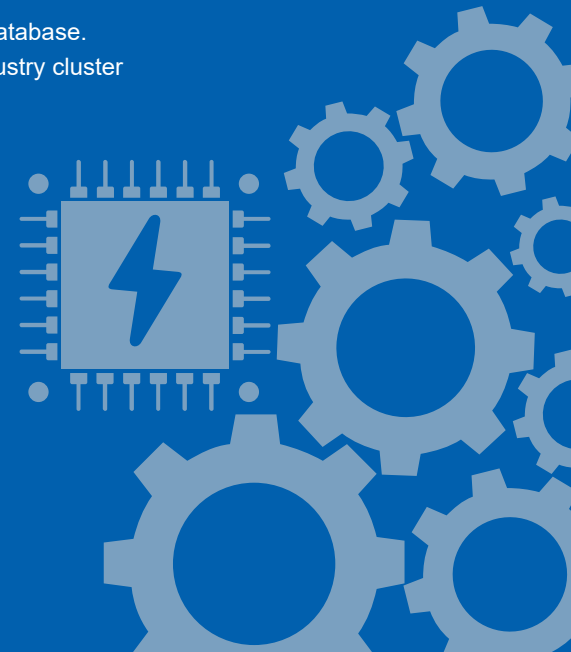
This directory serves as an official reference which MIDA uses to recommend reputable Malaysian companies to MNCs and foreign investors looking to build strong domestic supply chains. MIDA and other related agencies also refer to it for use in promotional tools, as a reference for outsourcing or joint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

The E&E Directory can be found at:



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





Check Out How to Get Started In Malaysia

If you are a prospective investor and want to know more about how to get started with building a business in Malaysia, you can refer to these official resources:

Starting up a Business in Malaysia

<http://www.mida.gov.my/home/starting-up-business/posts/>




Obtaining a Manufacturing License

<http://www.mida.gov.my/home/forms-&-guidelines-for-manufacturing-sector/posts/>



Connect with MIDA




MIDA is ready to assist you. If you require more information and facilitation advice, MIDA can be reached via the following physical and digital channels:

	E-mail: investmalaysia@mida.gov.my		
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Social Media:

MIDA is now on Twitter, Facebook, Instagram, LinkedIn and YouTube
Follow us on our social media for real-time updates and infromation about the investment landscape of Malaysia

				
				
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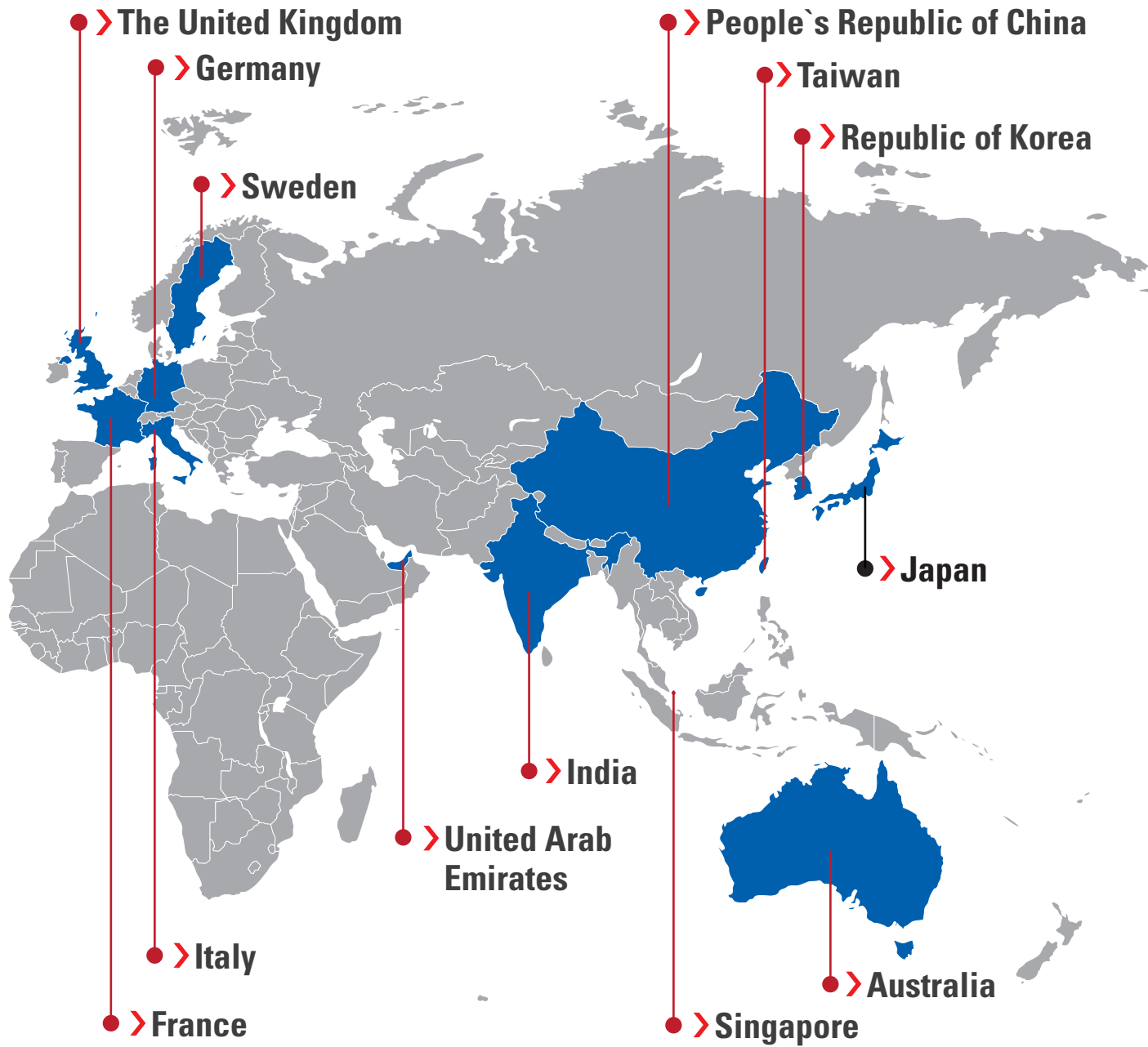
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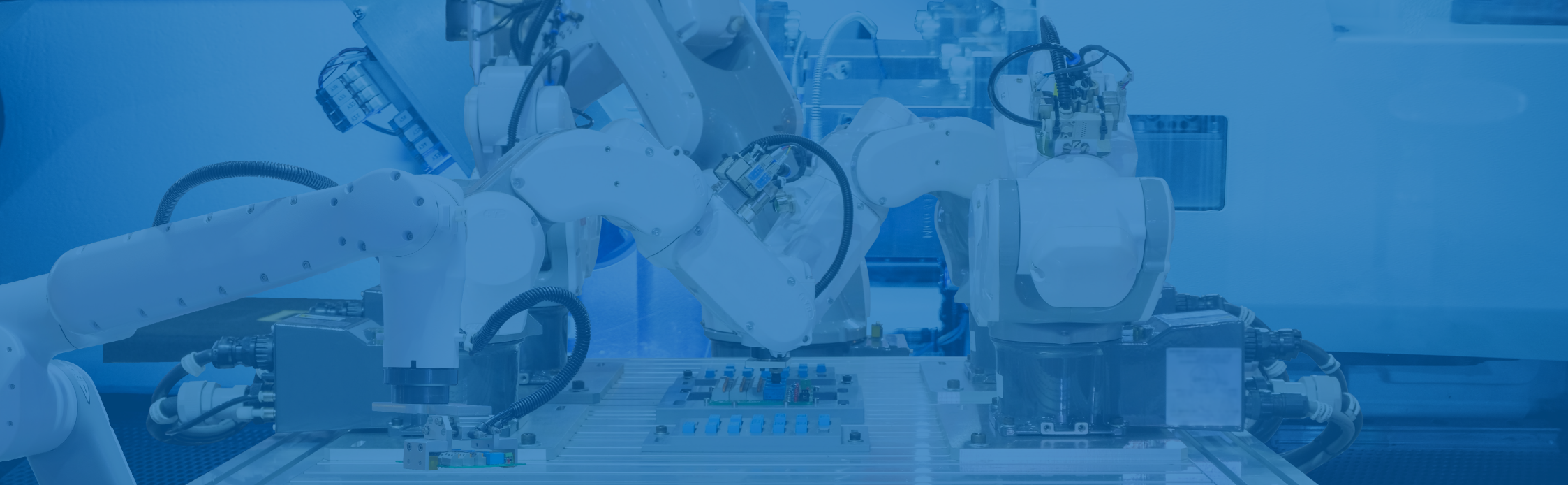
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