

Public Procurement as Industrial Policy

Promoting Local Agricultural Machinery Manufacturing through the Rice Competitiveness Enhancement Fund (RCEF)

Honey Bermudez Tabiola 



Political Economy Program

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"Demonstration of the Ronnie Baugh tractor during the 46th founding anniversary of the Center for Agri-Fisheries and Biosystems Mechanization (BIOMECH) of the College of Engineering and Agro-Industrial Technology (CEAT), University of the Philippines Los Baños (UPLB), on October 29, 2026."

Source: UPLB-BIOMECH, CEAT

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Why Does the Local Dairy Market Still Remain Import-Dependent?

Farmers Participation, Technology Transfers, and Capacity Building Under the Carabao Development Program (CDP)

Zedric Nicholas S. Bisenio

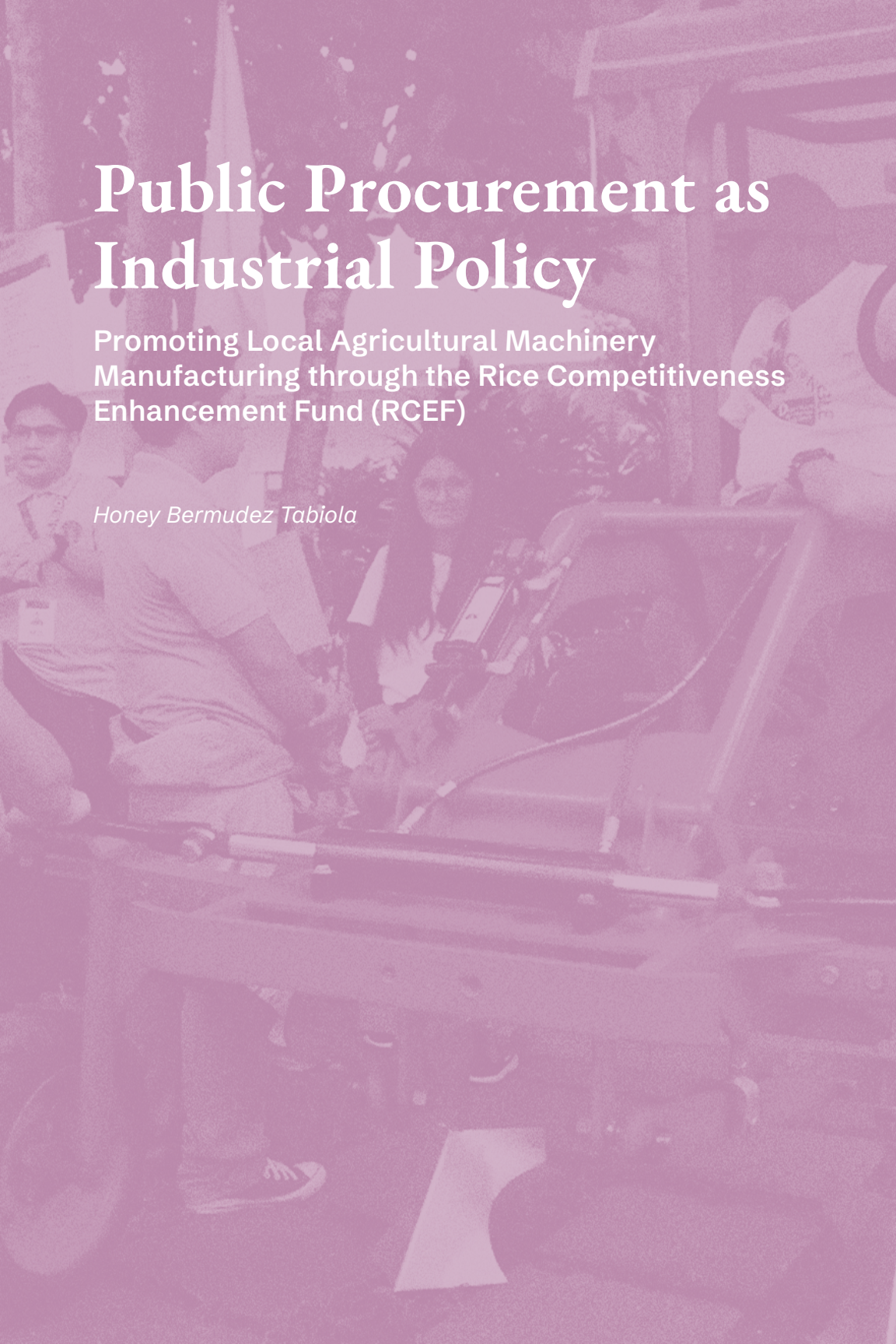


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DISCUSSION PAPER

Why Does the Local Dairy Market Still Remain Import-Dependent? Farmers Participation, Technology Transfers, and Capacity Building Under the Carabao Development Program (CDP)

A background photograph with a purple tint showing a group of people, including a man in a white shirt and a woman, gathered around a large piece of agricultural machinery, possibly a rice thresher or harrow, in an outdoor setting. The text is overlaid on the top left of this image.

Public Procurement as Industrial Policy

Promoting Local Agricultural Machinery Manufacturing through the Rice Competitiveness Enhancement Fund (RCEF)

Honey Bermudez Tabiola

Key Highlights

- The Rice Competitiveness Enhancement Fund (RCEF) offers a rare opportunity to leverage large and predictable public spending to strengthen the local agricultural machinery manufacturing (LAMM) industry. Yet evidence shows that its procurement has had limited impact on domestic production, as it remains focused on price competition, eligibility requirements, and financial risk management.
- International and local experience demonstrates that public procurement can be deliberately designed to nurture domestic industries, protect infant sectors, and create stable markets that enable micro, small, and medium enterprises (MSMEs) to invest and upgrade.
- Despite generating substantial and predictable demand, RCEF procurement remains largely transactional and burdened by stringent qualification and compliance requirements that constrain MSME participation, thereby limiting its contribution to domestic industrial development.
- In the main, the challenge lies not in the lack of funding but in the absence of strategic design linking government purchasing to long-term industrial development; without this, RCEF risks reinforcing import dependence rather than building the Philippines' agricultural machinery sector.

Introduction

Public procurement refers to the process by which a procuring entity—any government branch, agency, instrumentality, including state universities and colleges (SUCs), government-owned and controlled corporations (GOCCs), government financial institutions (GFIs), and local government units (LGUs)—acquires goods, engages consulting services, or contracts infrastructure projects, among other modalities. Given the state’s role as a major purchaser in the economy and its capacity to shape markets, technologies, and firm behavior, public procurement then occupies a uniquely strategic position in supporting domestic industries.

Studies on newly industrializing countries highlight strategic or developmental procurement as a policy tool that aligns public purchasing with broader economic objectives such as innovation, industrial upgrading, and the growth of micro, small, and medium enterprises (MSMEs) (Mazzucato and Wainwright 2024; Bürken et al. 2020; Sánchez-Carreira et al. 2018). With public procurement often worth 10–30 percent of a country’s GDP, as in the case of member countries of the European Union (European Commission 2011, as cited in Lember et al. 2014), government purchasing represents a powerful lever for economic transformation. This is true for a host of different countries—whether small (e.g., Sweden) or large (United States of America, China); highly developed (Denmark) or less developed (Estonia); old democracies (Australia) or new democracies (South Korea) (Lember et al. 2014).

Yet this potential of public procurement remained only partially realized (Mazzucato and Wainwright 2024). Despite the potential for government spending to create large-scale demand that supports domestic industries, public procurement over the past forty years has mostly focused on minimizing legal and financial risks. In practice, this has meant emphasizing the lowest bid, checking the reliability or past track record of suppliers—usually large firms—and ensuring compliance with rules, often at the expense of smaller MSME suppliers. They argue that, instead, government purchasing can be used strategically to create opportunities for local firms, encourage investment, and promote innovation to advance national economic and social goals.

This paper focuses on how public procurement can be leveraged to promote and further develop local agricultural machinery manufacturing (LAMM) in the Philippines. In particular, it examines the Rice Competitiveness

Enhancement Fund (RCEF) that was established with the passage of the Rice Tariffication Law or RTL (Republic Act [RA] No. 11203) in 2019. As per the law, 50 percent of the RCEF, which will be sourced from the tariffs collected from imported rice, would be used to procure and distribute farm machinery and equipment to rice farmers and cooperatives. From 2019 to 2024, RCEF allocated an annual amount of ₱5 billion for the procurement of machineries and equipment; from 2025 to 2031, this amount has been increased to ₱9 billion per year (PHilMech 2024; Sevillano 2024).

The implementation of RCEF since 2019, however, has done little to grow the domestic rural manufacturing sector. A substantial share of RCEF-funded procurement continues to flow to imported machinery, limiting the fund's potential to stimulate domestic manufacturing capacity. For FY 2019–24, out of ₱30 billion total budget for RCEF mechanization, only ₱3 billion worth of procurement went to local manufacturers (PHilMech 2025, 48). In 2023, in its *National and Agricultural and Fishery Mechanization Program (2023–2028)* document, the Department of Agriculture (DA 2023, 6–7) writes: “Unlike countries like Thailand, Indonesia and Vietnam, the Philippines also has significant reliance on imported components and machinery, which presents a major concern when it comes to mechanizing and modernizing agriculture.”

Despite the stated domestic preference provision in Section 13(a) of RTL, the Metalworking Industries Association of the Philippines (MIAP)¹ maintains that “government procurement have [sic] not been giving priority to local manufacturers which gives undue advantages to importers and their foreign counterparts” (MIAP 2021, 3–4). This assessment is supported by facts: according to the report of Japan International Cooperation Agency (JICA) and Sanyu Consultants Inc. (2025), of the 16,658 units procured by RCEF, 68.6 percent of the machinery was made by Japanese manufacturers, followed by 14.5 percent by Korean manufacturers and 9.9 percent by Taiwanese manufacturers. This gap between policy intent and procurement practice underscores the need to more deliberately align RCEF implementation with industrial development objectives. In this sense, it can be said that existing procurement practices have prioritized short-term distribution objectives over long-term capability building.

1 Founded in 1978, MIAP is a trade association representing companies involved in metalworking and related industries, with a nationwide membership of 225 firms.

This discussion paper will argue for the importance of public procurement as a strategic instrument of industrial policy. It also examines how public procurement—particularly large, recurring machinery purchases under the RCEF—can be more deliberately leveraged as an instrument of industrial policy, particularly sector-specific industrial upgrading. By analyzing the challenges encountered by the local manufacturers, the study contributes insights on how procurement can lower entry barriers, support MSME capability-building, and align agricultural modernization with manufacturing development. In the main, the paper reframes RCEF procurement as a strategic tool rather than a purely transactional process, and explores pathways through which RCEF can simultaneously advance agricultural mechanization goals and strengthen domestic manufacturing capabilities.

Adopting a qualitative research design, this study combines primary and secondary data sources. Primary data were collected through key informant interviews with a national industry association of local agricultural machinery manufacturers and a multi-stakeholder roundtable involving government agencies, industry players, farmers' organizations, and academic institutions. These were complemented by desk-based research on relevant laws, procurement regulations, policy documents, and academic literature to contextualize the findings within broader discussions on public procurement, industrial policy, and agricultural mechanization.

The next section presents an overview of the local agricultural machinery manufacturing (LAMM) sector, describing its structure, current strengths, and constraints. It then outlines the policy and institutional context shaping agricultural mechanization and public procurement in the Philippines, highlighting the major laws and agencies involved. The subsequent section advances the case for strategic public procurement as a tool to promote domestic manufacturing, drawing on selected international experiences to show how governments have used purchasing power to support industry upgrading. The paper then analyzes the experiences of local manufacturers with RCEF procurement, before concluding with policy recommendations to strengthen the developmental role of procurement in the agricultural machinery sector.

Overview of the Local Agricultural Machinery Manufacturing (LAMM)

The local agricultural machinery sector in the Philippines is dominated by a mix of manufacturers, fabricators, distributors, dealers, and importers. Despite this diversity, domestic production remains concentrated in a relatively small number of manufacturers, while most suppliers operate as distributors or dealers.

As of 1 November 2025, a total of 983 local suppliers were issued permits to operate (PTOs) (Vargas 2025). These companies were classified as manufacturers (36), fabricators (184), distributors (69), dealers (627), and importers (67), respectively. There are no assemblers and exporters. To support local fabricators, the Department of Agriculture - Bureau of Agricultural and Fisheries Engineering (DA-BAFE) reported that it has been conducting capacity-building workshops and providing technical assistance, including training on preparing operators' manuals and some guidance on navigating the local procurement system in RCEF and other DA programs and projects (Vargas 2025).

According to the industry roadmap for 2022–36 written by the Center for Agri-fisheries and Biosystems Mechanization (BIOMECH) at the University of the Philippines Los Baños (UPLB), as of February 2022, of the 106 accredited machinery suppliers, 45 percent are classified as large, 38 percent as medium, and 17 percent as small suppliers (PCAF 2022 as cited in Larona et al. 2022). Industry players are engaged in four components of the value chain, namely input supply; manufacturing; standards, testing, and regulation; and marketing, distribution, and consumption.

Table 1 shows the total number of local manufacturers and suppliers that were awarded contracts under the RCEF procurement from 2019 to 2024. Thirty-three domestic manufacturers and suppliers secured contracts under the RCEF mechanization component during its first six years of implementation. Together, they delivered 12,740 units of locally produced agricultural machinery—including hand tractors, floating tillers, rice threshers, recirculating dryers, and single-pass rice mills—amounting to more than ₱3 billion in total contract awards.

**Table 1. Types of Machines that Local Manufacturers Produce
(PHilMech 2025, 48)**

Technologies	Number of units	Bidded Amount	Number of Local Manufacturer
Hand Tractor	6,668	988,932,561.00	9
Floating Tiller	3498	335,894,036.00	5
Rice Thresher	1581	248,197,240.00	5
Recirculating Dryer (6 tons)	159	474,405,616.00	2
Recirculating Dryer (12 tons)	77	315,616,600.00	1
Impeller Rice Mill	31	18,596,528.00	1
Mobile Rice Mill	472	394,358,015.00	4
Single Pass Rice Mill	254	299,392,880.00	6
TOTAL	12,740.00	3,075,393,476.00	33

The relatively small share of RCEF funds awarded to domestic manufacturers—₱3.075 billion out of a ₱30 billion procurement budget—suggests that the program’s potential to strengthen local machinery production remains underutilized. This limited allocation reinforces dependence on imported equipment, constrains industrial learning, and reduces the broader economic benefits that could arise from supporting domestic suppliers. It highlights that simply allocating large funds is insufficient; strategic design and implementation are essential to turn procurement into a tool for building local manufacturing capacity.

The RCEF mechanization program presents a rare and strategic opportunity for the LAMM industry. By providing stable and predictable demand from the government, RCEF can help local manufacturers leverage their existing strengths—such as nationwide presence, emerging capabilities in producing single-cylinder engines, and existing local and international linkages—while capitalizing on opportunities like agricultural modernization, rural industrialization, and skills development programs (Larona et al. 2022). At the same time, predictable government procurement can help mitigate persistent weaknesses and threats, including low production volumes, reliance on imported machinery and components², unreliable quality and supply of

2 The dominance of foreign brands in the local market is a widely recognized phenomenon in the industry which was attributed to consumer’ preference for high-quality machinery. This prompted the Department of Agriculture to push for the introduction of Pinoy Quality Seal (PQS), a quality assurance system to strengthen the quality inspection and promotion of the local agri-fisheries machinery (Pangan et al. 2024). The policy brief on PQS was developed by BIOMECH at UPLB.

steel, weak after-sales support, and slow government payments, by encouraging investment, scaling up production, and strengthening operational capacity of domestic firms. In effect, RCEF can serve not just as a funding mechanism but as a strategic instrument to fortify domestic manufacturing and enhance the sector's long-term competitiveness.

Overall, the structure of the LAMM sector and its experience under RCEF reveal both unrealized potential and persistent constraints. While a core group of domestic manufacturers has participated in procurement and delivered locally produced machinery, their overall share in total RCEF spending remains limited. This raises a critical question: if the sector possesses identifiable strengths and if stable government demand can serve as a catalyst for upgrading, why has procurement not translated into deeper industrial development? To answer this, it is necessary to examine the broader policy and institutional framework governing agricultural mechanization and public procurement in the Philippines.

Domestic Policy and Institutional Context

The government, being the largest buyer in the economy, has the power to support the upgrading of its MSMEs. This idea has been embedded in various public policies. This section gives an overview of some key policies³ that this discussion paper engages, particularly highlighting provisions that are related to agricultural mechanization and the use of public procurement to promote local industries.

One point merits emphasis. Taken together, these laws reveal an implicit but consistent policy direction toward supporting the local manufacture of agricultural machinery. Yet this intent has been undermined in practice by “persistent fragmentation, limited monitoring tools, and weak inter-agency coordination” (Balaoing 2025, 1), which have diluted their developmental impact.

3 For an extended discussion of the agricultural mechanization policies in the Philippines, see Amongo and Larona (2015).

A. Focus on Rice Tariffication Law

1. RA No. 11203, or the Rice Tariffication Law (RTL).

The Rice Tariffication Law liberalized rice imports while establishing the Rice Competitiveness Enhancement Fund (RCEF) to strengthen the productivity and competitiveness of the domestic rice sector by providing support in the form of seeds, financial credit, training, and farm machinery.

A major pillar of RCEF is agricultural mechanization, with funds earmarked for the procurement and distribution of farm machinery and equipment to rice farmers and cooperatives through the Philippine Center for Postharvest Development and Mechanization (PhilMech). Under the initial six-year implementation (2019–24), P5 billion was allocated annually. With the enactment of Republic Act No. 12078 in 2024, RCEF was extended until 2031, and its annual funding for farm mechanization was increased to ₱9 billion. This earmarking is particularly significant given the long-standing difficulty of mobilizing sustained public financing for domestic production and industrial development.

The law provides an implicit domestic preference by mandating that PhilMech shall, “whenever feasible, procure from accredited local manufacturers to assist in the promotion of locally manufactured farm machineries and equipment” (sec. 13a). This provision positions public procurement under RCEF not merely as a tool for farm modernization, but also as a mechanism for supporting and developing the local agricultural machinery manufacturing industry.

B. Other Relevant Laws Linking Procurement to Promoting Domestic Manufacturing

1. RA No. 10601, or the Agricultural and Fisheries Mechanization (AFMech) Law of 2013

RA No. 10601 established the national policy of promoting agricultural and fisheries mechanization while supporting the local assembly and manufacture of machinery suited to Philippine conditions. It declares that the State shall “provide a conducive environment to the local assembling and manufacturing of engines, machinery and equipment for agricultural and fisheries production, processing and marketing” (sec. 2). The law mandates DA, in coordination

with Department of Science and technology (DOST) and the private sector, to promote and undertake initiatives for the local manufacture and assembly of agricultural machinery (sec. 15) and to extend financial and institutional support to domestic producers (sec. 16).

2. RA No. 9184 (Government Procurement Reform Act) and RA No. 12009 (New Government Procurement Act)

RA No. 9184 (Government Procurement Reform Act) is the primary Philippine law modernizing, standardizing, and regulating government procurement, focusing on transparency, competitiveness, and accountability for goods, infrastructure, and consulting services, creating the Government Procurement Policy Board (GPPB). Its purpose is to rationalize and harmonize Philippine procurement with international best practices, preventing corruption and ensuring value for money in government spending.

Crucially, RA No. 9184 contains the “single largest completed contract” (SLCC) requirement specified in sections 23.4.2.1 and 23.4.2.4 of the Implementing Rules and Regulations (IRR) of RA No. 9184. It requires bidders to have completed a similar contract worth at least 50 percent of the project’s approved budget. This was intended to ensure the reliability of the supplier.

In July 2024, RA No. 12009 (New Government Procurement Act) was enacted to replace the 21-year-old RA 9184. It modernizes the Philippine procurement system by shifting away from a rigid, one-size-fits-all framework toward a more flexible and strategic regime. It introduces fit-for-purpose procurement modalities—such as competitive dialogue; unsolicited offers with bid matching; direct acquisition for low-value purchases; and specialized procurement for science, technology, and innovation—allowing agencies to better match procurement methods with market and policy objectives.

The New Government Procurement Act eased the SLCC requirement of the RA No. 9184. With the relaxation of these rigid eligibility requirements, RA No. 12009 gives the flexibility to procuring entities in the government to

propose adjustments subject to the GPPB approval. And it is hoped that more suppliers will be able to join government procurement⁴.

3. The Tatak Pinoy Law and its Use of “Developmental Procurement”

The Tatak Pinoy Act’s renewed and explicit commitment to the strategic use of public procurement to support domestic industries creates a timely opportunity for local agricultural machinery manufacturers to leverage RCEF not merely as a distribution program, but as a platform for industrial upgrading and sectoral development.

As the Philippines’ first national industrial strategy crafted pursuant to legislation, RA No. 11981, or the Tatak Pinoy (Proudly Filipino) Act, champions the strategic use of government procurement to support local suppliers as one of its six major programs. It recognizes that government procurement is “an underused but powerful mechanism” for steering industrialization (DTI 2025, 53). The government, as the largest buyer, can create stable domestic demand that helps small and new firms build capacity and compete for public contracts.

The Tatak Pinoy Law outlines strategies for aligning various public policies that harness government procurement towards deepening industrial capabilities by lowering entry barriers for MSMEs while simultaneously enabling them to meet the demands of government procuring entities.

RA No. 11981 aims to fix the fragmented legal framework around government procurement by introducing reforms for both MSMEs and government agencies (DTI 2025, 61–64). For MSMEs, it provides pre-procurement

4 Under the Implementing Rules and Regulations of Republic Act No. 12009, the Bids and Awards Committee (BAC) functions as the core body that operationalizes the end-to-end public procurement process in the Philippines: from recommending the appropriate procurement modality and publicly inviting participation, to managing pre-bid activities, determining bidder eligibility, and overseeing the receipt, opening, and evaluation of bids; it then conducts post-qualification to verify compliance, resolves disputes such as requests for reconsideration, and recommends contract award to the Head of the Procuring Entity, subject to justified approval or disapproval. The BAC also enforces accountability through sanctions, ensures transparency via procurement monitoring reports submitted to the GPPB—thereby mirroring the full procurement cycle from planning and competition to evaluation, award, and oversight.

training, access to working capital, shared facilities for logistics and accounting, the Tatak Pinoy Seal for quality certification, and a digital list of ready-to-bid firms linked to the Philippine Government Electronic Procurement System (PhilGEPS).⁵ For the government, it integrates MSME participation targets into procurement plans, trains Bids and Awards Committees, includes the Tatak Pinoy Seal in eligibility and scoring, lowers qualification barriers, pilots new procurement approaches, and sets up an inter-agency group to coordinate legal, audit, and financing support.

These policies demonstrate that Philippine law already recognizes the developmental potential of public procurement, particularly in sectors such as agricultural machinery. From the AFMech Law to the Rice Tariffication Law and the Tatak Pinoy Act, the State has repeatedly signaled its intent to use government purchasing power to support domestic industry. Yet the translation of this intent into coherent, coordinated, and outcome-oriented practice remains uneven. To better situate this gap between policy ambition and implementation, the next section steps back and situates public procurement in a broader historical and international perspective—showing that, beyond acquiring goods and services, it has long functioned as a central instrument of industrial policy in many countries.

The Role of Strategic Public Procurement for Industrial Policy

Public procurement has historically been more than a mechanism for acquiring goods and services; it has been a central instrument of industrial policy. By directing state purchasing power toward domestic producers, governments can create and stabilize markets that might not otherwise exist, particularly in developing economies where private demand is thin and manufacturing capabilities remain fragile. In such contexts, government procurement serves not merely as public expenditure but as a strategic tool to reduce uncertainty, create a local market, and stimulate investment, thereby enabling domestic manufacturing to grow.

5 Suppliers should register to PhilGEPS to bid for and receive government contracts.

This development pattern has been associated with the modernizing state. In countries that are transitioning from an agrarian economy, there is little demand for industrial goods (e.g., steel, machinery, or equipment) and thus little incentive for the emerging economic elites to invest in manufacturing. In this scenario, the state plays a more active role in creating demand for strategic industries.

First, government purchasing was used to ensure that domestic firms had a stable market in which to learn and grow, especially during early industrialization. In South Korea, local firms began producing personal computers in the early 1980s, initially supported by mandatory government procurement of Korean-made machines, followed by a complete import ban that remained in place until 1988 (Wade 1990, 318; see also Evans 1995; Amsden 1989). In a benchmarking activity in South Korea, BIOMECH finds that the government provides subsidies as high as 80% to farmers in purchasing locally-made agricultural machinery (Pangan et al. 2024, 12)

In maritime Southeast Asia, shipbuilding industries got their start with the State playing a proactive role. State-owned or led enterprises in Indonesia and Malaysia—PT-PAL and Boustead Naval Shipyard, respectively—stepped up as both producers and procurers of locally made vessels in contract-based joint ventures with foreign naval shipbuilders (Raquiza 2019). Instead of relying on imports, their governments are able to reinvest public money into the domestic shipbuilding industry through technology transfer, job creation, and increased local content.

Second, public procurement can serve as a practical form of infant industry support. New industries in developing countries cannot immediately compete with established foreign producers. They require temporary support to build scale, learn technologies, and improve productivity. The state can ensure demand through long-term purchasing commitments. For example, as part of the promotion of its domestic electronics industry, the South Korean government used its purchasing power to help local companies develop their own telecommunications technology (i.e., electronic switching system) and then ensured that this locally made technology would be used in the country's

public network (Amsden 1989, 83–84)⁶. In Brazil, public procurement in sectors such as oil, defense, and infrastructure played a major role in developing domestic suppliers (Evans 1995).

Further, Ha-Joon Chang (2002, 31) argues that now-developed countries historically used trade policy, subsidies, and public procurement to support infant industries. Industrial growth did not emerge from market forces operating in the absence of deliberate state intervention. Instead, governments actively shaped markets and reduced risk for domestic producers. For example, in the United States, large-scale defense procurement programs and research and development (R&D) contracts played a decisive role in the emergence of industries such as computers, aerospace, and the internet.

Even in developed countries, the strategic use of public procurement to promote domestic industries remains relevant. Mazzucato and Wainwright (2024) provide two examples. In Denmark, the government created a secure market for wind energy by obliging utilities to purchase wind-generated electricity at preferential rates. This not only accelerated the adoption of wind power but also allowed domestic wind turbine producers to scale up and compete internationally. Meanwhile, Sweden has used public food procurement—especially school meal contracts—to drive sustainability while supporting smaller domestic producers. By embedding environmental standards in procurement contracts in smaller lots with long-term commitments, local governments have also created stable demand that allows local farmers and small-scale suppliers to invest in food certification and equipment upgrades, and improve production practices with reduced financial risk.

Recent Philippine experience shows that public procurement can be deliberately structured to support small domestic producers. The Department of Social Welfare and Development (DSWD 2021), through its Supplementary Feeding Program, requires that at least 30 percent of food requirements be sourced from local farmers' organizations using community-based procurement modalities, thereby guaranteeing market access for smallholder producers. Similarly, the Department of Education (DepEd), under the School-

6 Amsden (1989, vi) emphasizes that South Korea did not merely protect industries; it combined protection with discipline. Firms received support in exchange for performance. This approach reduced the risk of permanent inefficiency. She writes: "If they [big business groups] have been allowed to sell in protected domestic markets, they have had to produce and sell in the export market" (Amsden 1989, vi).

Based Feeding Program and consistent with RA No. 11037 (Masustansyang Pagkain para sa Batang Pilipino Act), prioritizes locally produced milk through formal partnerships with the National Dairy Authority and the Philippine Carabao Center, resorting to commercial suppliers only when certified local supply is insufficient (DepEd 2022). In practice, this framework has enabled a large majority of milk procurement in recent years to come from local dairy cooperatives and enterprises, demonstrating how procurement rules can be designed to create stable demand for small domestic suppliers while meeting social policy objectives.

The international and local experiences discussed above show that public procurement can be deliberately designed to nurture domestic industries, protect infant sectors, and create stable markets that enable firms to invest and upgrade. In principle, therefore, programs such as RCEF possess similar potential to function not only as mechanisms for distributing machinery but also as instruments for strengthening the local agricultural machinery manufacturing sector. The critical question, however, is whether this strategic promise is realized in practice. The next section turns to the experiences of local manufacturers under RCEF procurement to examine the concrete challenges they face in accessing and benefiting from this significant source of public demand.

Procurement Design and Barriers to MSME Access under RCEF

This section examines the experiences of local assemblers and manufacturers with RCEF procurement and explains why its large budget has had a limited impact on strengthening domestic agricultural machinery production. Two patterns emerge. First, although RCEF creates substantial and steady demand, procurement is treated mainly as a purchasing activity rather than as a tool for building local industry. Second, several qualifications and compliance requirements make it difficult for MSMEs to participate. Together, these factors limit the ability of RCEF spending to strengthen the local industry.

A. Procurement Without a Clear Industry-Building Strategy

PhilMech procures billions of pesos' worth of machinery under RCEF. However, there is no clear program linking these purchases to domestic capacity building. Procurement decisions are not supported by a long-term plan to help local manufacturers upgrade, expand production, or enter supply chains.

MSME manufacturers report limited access to advance and consolidated information about what machines will be procured, in what quantities, and with what specifications. Without predictable demand signals, firms cannot plan investments in equipment or adjust production lines. They are also rarely included in procurement planning or consultation processes. In addition, there is little coordinated effort to promote parts standardization, monitor imported components that could be locally produced, or support research and development. As one manufacturer noted, there is no clear-cut program for integrating MSMEs into DA's capacity-building and procurement activities. In short, RCEF generates demand, but this demand is not systematically used to strengthen domestic manufacturing.

B. High Entry Barriers in Qualification and Financial Requirements

Two major eligibility requirements—the single largest completed contract (SLCC) and the net financial contracting capacity (NFCC)—act as significant entry barriers.

The SLCC requires bidders to have completed a similar contract worth at least 50 percent of the project's approved budget. While intended to ensure reliability, this rule disadvantages smaller firms and new manufacturers that may have technical capability but lack large prior government contracts. It favors firms that have already secured large public projects, reinforcing the position of established players.

The NFCC, on the other hand, measures whether a firm has enough short-term funds to cover the contract amount. The computation relies on recent audited financial statements and focuses on how much cash and assets a firm currently has. In practice, this screens firms based on their financial position

rather than their actual ability to produce the required goods. MSMEs with very limited working capital—especially after the pandemic—are often disqualified even if they can technically deliver the required goods.

These two requirements favor firm size and strong cash positions over actual ability to produce. As one industry representative put it, large companies “are the only ones who can participate in big ticket projects of the government,” while smaller manufacturers are effectively shut out. Instead of broadening participation, the rules tend to concentrate contracts among firms that already have more money and prior government contracts.

C. Tax Compliance, Payment Delays, and Costly Accreditation

Beyond eligibility rules, compliance requirements further limit MSME participation. Securing tax clearance has become a major obstacle. Some firms report repeated audits, disputed assessments, and even bank account garnishments⁷ that disrupted operations and damaged credit standing. Without tax clearance, firms cannot renew their registration with the Philippine Government Electronic Procurement System (PhilGEPS) and are automatically excluded from bidding. Unlike large corporations, MSMEs often lack legal teams and cannot absorb prolonged account freezes or litigation costs.

Delayed payments also create serious risks. Small manufacturers depend on steady cash flow to purchase materials and pay workers. When government payments are slow, firms bear the full financial burden. What should be a stable market can instead become a source of financial distress.

Finally, multiple accreditation requirements—such as permits, compliance certificates, and Agricultural Machinery Testing and Evaluation Center (AMTEC) testing—raise the cost of entry. Testing fees are high, and testing schedules depend on cropping seasons, since machines must be evaluated

⁷ *Garnishment* refers to a legal process in which the government or a creditor orders a bank to freeze or seize funds from a company's account to settle alleged unpaid taxes or debts.

during actual field use.⁸ As a result, if a firm finishes developing a new model outside the testing period, it may have to wait several months for the next season, causing it to miss an entire procurement cycle. Even when firms innovate, certification delays can prevent them from selling to the government.

Overall, while RCEF has the scale to stimulate domestic manufacturing, its current procurement design places heavy emphasis on compliance, financial strength, and procedural requirements. Without reforms that lower entry barriers, improve predictability, and link purchasing to supplier development, procurement is unlikely to function as an effective instrument of industrial growth.

Strategic Public Procurement and Its Potential for Domestic Manufacturing

Public procurement can play a transformative role in industrial policy, especially in developing economies where private markets are small and manufacturing capabilities are fragile. By guaranteeing demand, the state can reduce uncertainty for domestic firms, enabling them to invest in equipment, skills, and technology. The Rice Competitiveness Enhancement Fund (RCEF) presents a unique opportunity in this regard. Unlike many government programs, RCEF provides a sizeable and predictable funding stream that can create stable, large-scale demand for locally manufactured agricultural machinery. Strategically deployed, this funding could simultaneously improve rice production competitiveness and strengthen domestic manufacturing—a dual impact with high stakes for food security, given the Philippines’ status as one of the world’s largest rice importers.

In principle, RCEF procurement activities can stimulate and shape local agricultural manufacturing. Historical experience in East Asia shows that when procurement is linked to industrial development and technology upgrading, firms gradually build capabilities and scale (Amsden 1989; Wade

8 Testing during the appropriate stage of the crop cycle allows evaluators to measure performance, efficiency, durability, and output under real farming conditions. Further, if no crops are in the field—such as during the dry or off-season—there is no practical way to conduct meaningful performance trials.

1990). In contrast, the Philippine experience suggests that RCEF procurement is largely transactional. It emphasizes price, eligibility, and compliance but is not systematically coordinated with programs for MSME development, local content promotion, or long-term industry planning. Without advance information on demand, consultations, or support for parts standardization and technology development, domestic firms face uncertainty that discourages investment. In effect, procurement generates short-term sales without fostering sustained capacity building.

Procedural requirements such as the Single Largest Completed Contract (SLCC) and Net Financial Contracting Capacity (NFCC) further limit participation. These requirements tend to favor firms that can handle large contracts and have enough money on hand, and exclude smaller firms with limited prior government contracts or funds—common features of MSMEs—even if they possess technical capability. This pattern aligns with broader research showing that procurement systems often prioritize financial risk management over industrial development objectives (Thai 2001; Mazzucato and Wainwright 2024). In the Philippine context, this tendency is compounded by weak policy coordination. As Balaoing (2025, 2) observes, “procurement remains disconnected from sectoral policy and capability development [of local suppliers], with no centralized planning process or medium-term procurement strategies in place.”

Payment delays, fragmented accreditation systems, and difficulties in tax compliance further increase the cost of participation. For small manufacturers that depend heavily on cash flow, delayed payments can threaten survival. Evidence from other countries suggests that timely payment and simplified qualification procedures are critical to enable MSME participation in government procurement opportunities (OECD 2018). Where administrative burdens are high and dispute resolution mechanisms are weak, procurement can shift risk from the state to suppliers. This undermines the potential of government procurement to play a development role.

The study shows that simply allocating large funds under RCEF for mechanization is insufficient to generate real gains for the local agricultural machinery manufacturing industry. While RCEF has benefited some local manufacturers, the bulk of the funds has been used to buy imported machinery and equipment. To serve as a strategic tool, RCEF procurement must be deliberately designed: it needs to provide predictable demand, support for the capacity building of domestic firms, fair qualification criteria, timely

payments, and effective accountability mechanisms. Only then can programs like RCEF fulfill their potential to boost domestic manufacturing, increase rice productivity through advanced mechanization, and contribute to national food security.

Policy Recommendations

This section presents policy recommendations towards strengthening RCEF's role as a strategic policy tool to grow domestic agricultural manufacturing. Drawing from the study's findings, the proposals seek to help broaden MSMEs' access to RCEF processes and RCEF's role toward a more strategic, developmental orientation. Collectively, they show how existing procurement frameworks can be better leveraged to use RCEF's scale and predictability to strengthen local agricultural machinery manufacturing while maintaining transparency and accountability.

1. Institutionalize MSME Inclusion in RCEF Procurement

RCEF procurement generates large and predictable demand for agricultural machinery, yet this demand is not strategically used to build domestic manufacturing capacity. There is a need for PhilMech to go beyond transactional procurement by institutionalizing rolling multi-year procurement plans. Formal inclusion of MSME associations in pre-procurement planning, alongside a centralized and publicly accessible RCEF procurement database⁹ on machinery types, volumes, and standards, would also reduce information asymmetries and allow local manufacturers to align investments and production with government demand.

9 Pangan et al. (2024) suggest that the government should identify agri-fisheries machineries that can be locally sourced which will inform the decisions of local manufacturers on what machines to mass produce and invest in.

2. Align RCEF with Industrial Development and Local Manufacturing

RCEF procurement should be explicitly aligned with industrial policy objectives by adopting domestic preference rules and local content targets for machinery that can be produced or assembled locally¹⁰. Toward this end, there is a need for PhilMech to link RCEF demand to a structured Local Agri-Fisheries Machinery Assembly and Manufacturing Industry Roadmap that supports firm upgrading through technology transfer, tooling, and quality improvement (Larona et al. 2022). Publishing import data on machinery parts and standardizing components would further enable import substitution and strengthen domestic parts and repair ecosystems.

3. Fully Implement RA No. 12009, or the New Government Procurement Act (NGPA), to Remove Structural Entry Barriers

RA No. 12009 provides flexibility to reform exclusionary procurement rules, but these provisions must be actively applied in RCEF operations. PhilMech and DA should move away from rigid reliance on the SLCC and NFCC requirements and provide more inclusive criteria to assess MSME eligibility. For example, subject to the Government Procurement Policy Board (GPPB), RA No. 12009 now provides greater flexibility by allowing procuring entities to adjust the SLCC requirement. This includes permitting alternative qualification pathways based on verified performance, private-sector track records, or certification under government upgrading programs. Without operationalizing reforms stipulated in RA No. 12009, procurement will continue to privilege liquidity and contracting history over actual manufacturing experience.

10 For example, Pangan et al. (2024) recommend that the government should restrict or limit the number of imported agri-fisheries machinery when locally manufactured machinery and equipment are already available. Larona et al. (2022) further add that the government should set targets on percentages of locally produced machineries with Pinoy quality seal: at least 15% of locally produced machines by 2022-2026, at least 50% by 2027-2031; and at least 75% by 2032-2036 respectively.

4. Introduce MSME-Sensitive Tax and Financial Compliance Rules

MSME participation in government procurement is particularly affected by cumbersome procedures that cause delayed clearances and account garnishments. The Department of Finance (DOF), Bureau of Internal Revenue (BIR), and Anti-Red Tape Authority (ARTA) should establish fast-track compliance and dispute-resolution mechanisms for MSMEs participating in government programs like RCEF, including limits on garnishments during tax cases under dispute. Such safeguards are necessary to ensure that tax administration does not impede industrial upgrading and productive capacity.

5. Fix Payment Delays and Cash-Flow Risks

Delayed government payments expose MSMEs to severe cash-flow risks, often triggering debt accumulation, tax noncompliance, and eventual exclusion from bidding. The DA and PhilMech should be bound by strict payment timelines for MSME suppliers, with ARTA oversight and penalties for noncompliance. Allowing milestone or partial payments for large machinery orders would also further stabilize cash flow and reduce systemic bias for large, well-capitalized firms.

6. Streamline and Harmonize Accreditation Systems

Fragmented accreditation requirements—particularly National Agricultural and Fisheries Machinery Assemblers, Manufacturers, Importers, Distributors and Dealers Accreditation and Classification (NAMDAC), PTO, and AMTEC—impose high costs and long delays that disproportionately burden MSMEs and innovators. There should be a single-window accreditation system at the DA that would harmonize approvals, reduce fees for MSMEs, and allow provisional certification for newly developed machinery. Streamlining accreditation would ensure that innovation leads to market access rather than regulatory exclusion.

7. Enforce Accountability and Clean Procurement

MSMEs cannot compete effectively when suppliers flagged by the Commission of Audit (COA) or the Ombudsman continue to receive government contracts. Procurement integrity requires automatic review

or suspension mechanisms linked to audit and investigative findings, supported by transparent PhilGEPS blacklists and watchlists. Greater disclosure of RCEF awards and import origins would further ensure that public procurement supports domestic industrial development.

Conclusion

Public procurement holds significant potential as a strategic instrument of industrial policy. As this study has shown, RCEF offers a rare opportunity to harness large and predictable public spending to strengthen the local agricultural machinery manufacturing sector while advancing national food security. In principle, RCEF could function as an anchor market—reducing uncertainty, enabling firms to invest in equipment and skills, and fostering technological upgrading, as historical experience in East Asia suggests.

Yet the evidence indicates that RCEF procurement remains largely transactional. Its current design emphasizes price competition, eligibility compliance, and financial risk management, rather than coordinated supplier development and long-term industry planning. Procedural requirements, along with payment delays, fragmented accreditation systems, and tax-related burdens, disproportionately constrain MSMEs. In doing so, procurement shifts risk onto suppliers and limits the capacity of domestic firms to scale up, innovate, and deepen local production. The result is a missed opportunity: large public funds generate short-term sales but fall short of sustained industrial upgrading.

The policy recommendations advanced in this paper demonstrate that this outcome is not inevitable. By institutionalizing MSME inclusion, aligning RCEF with the existing LAMM industry roadmap, operationalizing the flexibility under RA No. 12009, streamlining accreditation, ensuring timely payments, and strengthening accountability, RCEF can be transformed into a genuinely developmental procurement regime. In the main, the challenge is not the absence of funding, but the absence of strategic design. If deliberately structured, RCEF can move beyond mechanization as distribution and become a cornerstone of domestic manufacturing growth—enhancing rice productivity, revitalizing and strengthening the local agricultural machinery manufacturing industry, and contributing to long-term national food security.

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Declaration of Generative AI and AI-Assisted Technologies in the Writing Process

In the preparation of this manuscript, the author used ChatGPT, a generative artificial intelligence tool developed by OpenAI, to assist in improving language clarity, grammar, and overall readability.

All substantive arguments, interpretations, and conclusions presented in this work remain the sole responsibility of the author.

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