出國報告（出國類別：其他）

參加世界自由貿易區組織 (World FZO)第二屆大會

服務機關：交通部航港局
經濟部加工出口區管理處
姓名職稱：祁文中/局長
饒智平/組長
梁麗琴/科長

派赴國家：阿拉伯聯合大公國杜拜邦
出國期間：**105** 年 **5** 月 **6** 日至 **13** 日
報告日期：**105** 年 **7** 月 **5** 日

摘要

世界自由貿易區組織(World FZO)於 2014 年 5 月 19 日在阿聯杜拜正式設立總部，係為一關注全球各地自由區(Free Zones)之非營利組織，至 2015 年底止，已有 46 國家共計 189 個會員加入。

該組織每年固定舉辦大會，今(2016)年度交通部航港局及經濟部加工出口區管理處分別以合作夥伴及觀察員、正式會員等會員身分，由交通部航港局祁局長率團於 5 月 6 日至 13 日赴杜拜參加世界自由貿易區組織第二屆大會，本次會議主題為「全球價值鏈：未來自由區之機會(Global Value Chains：Opportunities & Challenges for the Free Zone of the Future)」，聚集來自 45 個國家的 200 個自由區及超過 680 位講者參加，分享其對於全球自由區與貿易相關重要議題之看法，並期促進不同自由區間合作、發展與交流，吸引更多商業及工業投資等正面成效。

我國藉此難得機會親自拜會世界自由貿易區組織主席、執行長及董事等 3 人，除誠摯感謝主席邀請與會外，宣傳我國自由貿易港區發展現況與今(2016)年加工出口區慶祝建區 50 週年等，並獲執行長口頭允諾來臺參訪；會晤 2014 年全球貨櫃碼頭經營公司第 4 名－杜拜環球港務集團(DP World)、杜拜台灣貿易中心、長榮海運股份有限公司、陽明海運集團及萬海航運股份有限公司駐當地代表等，簡介國內航港業務推展現況，並瞭解中東地區經貿發展趨勢與航運經營環境、當地貨櫃航運及碼頭事業之運作情形等。

最後，建議我國後續可持續參與世界自由貿易區組織年度大會，並就我國自由區如：加工出口區、科學園區、自由貿易港區及農業科學園區等之發展經驗，提出貢獻及分享；隨該組織規劃推動綠色自由區認證計畫，爭取我國自由區能受其認證，並透過該組織作為我國與國際企業資源鏈結之一網絡平臺，多加運用該組織提供之各項服務，藉以鏈結國際大廠資源，強化廠商佈局全球供應鏈，並加速投資環境之自由化與國際化。

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一、背景

在阿拉伯聯合大公國(下稱阿聯)積極推動下，世界自由貿易區組織(World Free Zones Organization, World FZO)於 2014 年 1 月 14 日在瑞士日內瓦註冊，2014 年 5 月 19 日在阿聯杜拜正式設立總部，由杜拜機場自由區局長 Dr. Mohammed Alzarooni 擔任主席，係為一關注全球各地自由區(Free Zones)之非營利組織，至 2015 年底止，已有 46 國家共計 189 個會員加入，包括各國自由貿易區(Free Trade Zones, FTZs)、加工出口區(Export Processing Zones, EPZs)及經濟特區(Special Economic Zones, SEZs)等。

世界自由貿易區組織每年固定舉辦大會，邀請其各國會員、自由區及其經營機構、協會、企業、顧問及政府機關等與會分享經驗，今(2016)年度於 5 月 8 日至 12 日在杜拜舉辦第二屆大會，會議主題訂為「全球價值鏈：未來自由區之機會(Global Value Chains：Opportunities & Challenges for the Free Zone of the Future)」，期許具有潛力與機會之自由區催化企業參與全球價值鏈活動。

我國前由經濟部加工出口區管理處、臺灣港務股份有限公司、桃園國際機場股份有限公司及外交部等機關(構)於去(2015)年 5 月 9 日至 15 日組團赴杜拜參加世界自由貿易區組織第 1 屆大會，會議主題為「邁向一個新的全球貿易秩序(Towards a New Global Trade Order)」，各國與會代表們咸認為「國際貿易對一個國家經濟發展之裨益」，「創新」及「領導力」對自由區發展之重要性，並探討新興市場之貿易成長潛力及如何消除與簡化海關通關障礙，提升單一窗口服務便利性，俾吸引中小企業與新創事業至自由區投資。

嗣後，經濟部加工出口區管理處、臺灣港務股份有限公司、桃園國際機場股份有限公司等機關(構)陸續加入世界自由貿易區組織成為正式會員，而交通部航港局亦申請成為該組織之合作夥伴及觀察員，祁局長文中於 2016 年 4 月 10 日接獲該組織主席 Dr. Mohammed Alzarooni 親簽公函同意入會，並受邀於 2016 年 5 月 6 日至 13 日率團赴杜拜參加世界自由貿易區組織第二屆大會。

外交部於 2016 年 4 月 7 日函文建議交通部航港局祁局長率團前往與會，爰

為拓展我國與國際交流之良好平臺，提高我國於國際場合之能見度，並增進我國自由貿易港區(下稱自由港區)、加工出口區與各國自由區充分交流，由交通部航港局祁局長文中率饒組長智平及經濟部加工出口區管理處梁科長麗琴共計 3 人參加本次大會。

二、目的

(一) 瞭解世界自由貿易區組織會員權益及服務，並積極參與今(2016)年度該組織重要活動，增進與各國自由區及其經營機構、協會、企業、顧問及政府機關等互動與經驗交流，俾提升我國國際場合能見度。

(二) 掌握世界經貿發展及全球價值鏈(Global Value Chains, GVC)推展趨勢，並汲取各國自由區經營管理、獎勵計畫及綠色自由區認證計畫等資訊，俾精進我國自由港區及加工出口區相關政策推動方向。

(三) 藉由會晤世界自由貿易區組織主席等人，宣傳我自由港區及加工出口區發展現況，就雙方自由區未來發展進行意見交換，並表達感謝邀請我國相關機關(構)入會之意。

(四) 拜訪杜拜環球港務集團(DP World)、杜拜台灣貿易中心、陽明海運、長榮海運及萬海航運等當地代表，就當地經貿與航運經營環境、貨櫃航運及碼頭經營業務運作狀況等進行意見交流。

貳、行程紀要

我國組團赴杜拜參加世界自由貿易區組織第二屆大會，自今(2016)年 5 月 6 日至 13 日，為期 8 天，主要行程摘要如下：

表 貳-1 赴杜拜參加世界自由貿易區組織第二屆大會行程一覽表

日期	星期	地點	主要行程摘要
2016/5/6	五	臺北	交通部航港局祁局長文中及饒組長智平等 2 人自桃園國際機場搭機赴杜拜國際機場。
2016/5/7	六	杜拜	1. 交通部航港局祁局長文中及饒組長智平等 2 人抵達杜拜國際機場。 2. 經濟部加工出口區管理處梁科長麗琴自高雄小港國際機場搭機抵達杜拜國際機場。
2016/5/8	日	杜拜	拜會當地陽明海運、長榮海運及萬海航運等業者。
2016/5/9	一	杜拜	參加世界自由貿易區組織第二屆大會及拜會該組織主席等人。
2016/5/10	二	杜拜	參加世界自由貿易區組織第二屆大會。
2016/5/11	三	杜拜	參加世界自由貿易區組織第二屆大會。
2016/5/12	四	杜拜	1. 拜會杜拜環球港務集團。 2. 經濟部加工出口區管理處梁科長麗琴自杜拜國際機場搭機返臺。
2016/5/13	五	臺北	交通部航港局祁局長文中及饒組長智平等 2 人，自杜拜國際機場搭機返臺。

參、大會內容紀要

一、主題簡介

世界自由貿易區組織於今(2016)年 5 月 8 日至 12 日假杜拜凱悅飯店(Grand Hyatt Dubai)辦理第二屆大會，有關大會主題「全球價值鏈：未來自由區之機會」探討重點如下：

近年來，國際貿易之生產與投資形成全球價值鏈，改變全球商務既有模式，使得產品在不同國家進行開發與生產，並融合不同技術與原料，達到降低成本、精進品質及提升貿易競爭力。

很多國家瞭解要使企業成功成為全球價值鏈一員，除企業本身需具備高度競爭力外，政府需在國內提供具有國際競爭之企業環境，包含穩定管制措施與總體經濟、高品質基礎設施與物流服務、低關稅、消除貿易障礙、促進貿易協定、競爭性之金融與勞動市場等水平面措施，輔以垂直面策略，促進企業拓展全球。

而自由區政策(Free Zone Regimes)為有效協助國家參與全球價值鏈的方式，其中自由區係指企業在國家領土內之部分區域，將享有稅賦優惠及關務鬆綁，目前該政策已廣泛在許多國家發展，益於促進商業成熟度及拓展策略領土。

一般而言，企業設於自由區較易參與全球價值鏈活動，尤以出口導向為主之自由區，通常以稅賦及關務優惠作優先策略，俾使企業成長。惟當自由區發展到一定之架構、效率及經濟規模，透過產業聚集與物流所帶來之效益，將成為驅動生產多樣化之關鍵因素，且優於僅有稅收差異制度之自由區；新興經濟體之自由區亦應參與全球價值鏈，從事組裝和簡易加工，藉此參與更先進之技術、財務金融與物流服務等。

現今在不斷變化之國際環境下，自由區扮演之角色將更複雜，政府不僅應保持企業在自由區享有稅賦與關稅優惠，亦需提供企業額外協助，以提高其效率與國際競爭力。為此，中央與地方政府、自由區營運者及企業需共同合作推動自由區相關監管策略如下：(一)察覺全球價值鏈可能商機，(二)尋求與聯繫關鍵合作夥伴，(三)建立企業連結專業客戶及全球各地供應商之資訊系統，(四)確保自由區的企業具國際水準，(五)領導市場經營行銷活動，建立所在地供應商在全球價值鏈市場之地位等。

因此，在全球化不斷發展下，所有商品與服務將涉及跨國企業間複雜之國際貿易程序，使得全球價值鏈及產業內貿易將逐漸改變國際貿易原有之型式，而自由區具有潛力與機會，可成為企業之主要催化劑。

二、議程

(一) 2016 年 5 月 9 日(星期一)

表 參-1　2016 年 5 月 9 日大會議程

時間	議程
08:00-19:00	報到
09:00-17:30	展覽開放時間
09:00-10:30	工作坊 1－邁向全球價值鏈：吸引投資至您的自由區 1. 主持人：*Dr. Douglas van den Berghe & Laurens van der Schoor – ICA* 2. 概況：(1)簡介 (2)外國直接投資之最新全球趨勢與企業擴張之其他型式 (3)軟硬兼施，吸引更多投資至您的自由區 (4)促進再投資與擴張既有投資之善後策略
10:30-11:00	茶敘
11:00-11:30	展覽開幕式
11:30-13:00	工作坊 2－設立自由區之關鍵因素 主持人：*Gokhan Akinci, World Bank Group*
11:30-13:00	工作坊 3－利用特定區域知識訂定綠色自由區認證計畫 主持人：*Dr. Pablo Izquierdo, Thomas Bosse*
13:00-14:00	午宴
14:00-15:30	工作坊 4－未來實踐成為最佳自由區 主持人：*Dr. Mohan Guruswamy - World FZO*
15:30-16:00	茶敘及參觀展覽
16:00-17:30	工作坊 5－組織運用創新設計思維 主持人：*Shadi Banna- Potential*
16:00-17:30	工作坊 6－瞭解與估算自由區帶來之經濟影響 主持人：*Lucien Randazzese - SRI International*

(二)2016 年 5 月 10 日(星期二)

表 參-2　2016 年 5 月 10 日大會議程

時間	議程
08:00-17:30	報到
08:00-17:30	展覽開放時間
09:00-10:00	開幕致詞 世界自由貿易區組織執行長 *Dr. Samir Hamrouni* 聯合國貿易暨發展會議　副秘書長 *Joakim Reiter* 哥斯大黎加　外貿部長 *Alexander Mora*
10:00-11:00	專題演講 1－全球價值鏈之治理 主持人：香港大學亞洲環球研究所教授 *Patrick Low* 與談人：阿聯 *Dubai South* 副營運長 *Ahmed AI Ansari* 瑞士世界貿易組織經濟研究及統計部主任兼首席經濟學家 *Robert Koopman* 美國杜克大學高級研究分析師　*Karina Fernandez Stark* 新加坡國立大學經濟地理學教授 *Henry Yeung*
11:00-12:00	茶敘及參觀展覽
12:00-13:00	就職典禮 阿聯經濟部長 *HE Sultan AI Mansoori* 世界自由貿易區組織主席 *Dr. Mohammed Alzarooni*
13:00-14:00	午宴
14:00-15:00	專題演講 2－全球價值鏈之政策啟發 主持人：義大利歐洲大學學院羅伯舒曼高級研究中心全球經濟部主任 *Bernard Hoekman* 與談人：美國外貿區協會主席 *Daniel Griswold* 波蘭投資局局長 *Slavomir Majman* 阿聯杜拜國際金融中心 *Chirag Shah* 瑞士國際僱主組織副秘書長 *Roberto Suarez*
15:00-15:30	茶敘及參觀展覽
15:30-16:30	專題演講 3－跨國企業對於全球價值鏈之遠景 主持人：美國喬治亞州外貿區執行長 *Julie Brown* 主講人：空中巴士中東子公司總裁 *Habib Fekih* 與談人：美國 *Integration Point* 主席 *Tom Barnes* 空中巴士中東子公司總裁 *Habib Fekih* 美國杜克大學社會學教授　*Gary Gereffi*
16:30-17:00	茶敘及參觀展覽
17:00-18:30	工作坊 7－智慧的世界自由區準則草案

(三)2016 年 5 月 11 日(星期三)

表 參-3 2016 年 5 月 11 日大會議程

時間	議程
08:00-17:30	報到
08:00-17:30	展覽開放時間
09:00-09:30	演講
09:30-10:30	專題演講 4－全球價值鏈：自由區之未來機會 主持人兼主講人：美國杜克大學社會學教授 *Gary Gereffi* 與談人：世界銀行集團全球產品組組長 *Gokhan Akinci* 哥倫比亞前駐世界貿易組織大使 *Hernando José Gómez* 世界自由貿易區組織副主席 *Martin Iberra* 法國經濟合作暨發展組織資深貿易經濟學家 *Przemyslaw Kowalski*
10:30-11:00	茶敘及參觀展覽
11:00-12:00	專題演講 5－未來實踐成為最佳自由區 主持人兼主講人：*World FZO* 知識長 *Mohan Guruswamy* 與談人：國際商會 *BASCAP* 副主任 *Willian Dobson* 瑞士世界貿易組織統計長 *Hubert Escaith* 美國 *Lewis Leibowitz* 法律事務所律師 *Lewis Leibowitz* 摩洛哥坦吉爾自由區董事會成員 *Mehdi Tazi-Riffi* 荷蘭投資顧問合夥企業創辦人兼執行長 *Douglas Van Dan Berghe*
12:00-12:30	MBA 開辦 西班牙 IESE 商學院學務長 *Jaume Ribera* 西班牙 IESE 商學院計畫總監 *David Zorn*
12:30-13:00	閉幕典禮
13:00-14:00	午宴
14:00-16:30	世界自由貿易區組織會員大會

三、 重要演講紀要

阿聯經濟部長曼蘇里(HE Sultan AI Mansoori)蒞臨本次大會致詞表示，在面臨全球經濟挑戰下，阿聯經濟有顯著增長，尤其是投資發展部門，這都歸功於阿聯領導之政策與眼界，以帶領國家經濟更為茁壯與健康。而自由區之營業額占阿聯非油品貿易量的 30%，自 2011 年迄今之成長率已達 35%，2015 年甫創下 4,970 億阿幣(折合約 1,362 億美元)營業額。

其中，傑貝阿里自由區(Jebel Ali Free Zone，JAFZA)和杜拜機場自由區(Dubai Airport Free Zone)為杜拜兩大自由區，不僅提供杜拜大部分之進出口貿易值，更為管理和發展之示範區；以傑貝阿里自由區(JAFZA)為例，分別占杜拜及阿聯近 50%及 25%的非石油出口，占阿聯吸引外商直接投資總額 20%；2015 年，傑貝阿里自由區企業總數量增加 8%，屬於設備及機械、電子、鋼材及建築材料之企業增加 12%。目前該自由區內共有 7,100 多家企業，包括超過 100 家全球財富前 500 名企業，約 70%經營貿易業務，其餘則涉足製造及物流領域。

世界自由貿易區組織主席 Dr. Mohammed Alzarooni 表示，全球各地已設立自由區來創造多樣化經濟、吸引外來投資、創造就業機會，並促進創新與貿易；然自由區對於全球經濟之貢獻卻往往未受承認。因此，我們很高興本(2016)年度大會能有來自 45 個國家的 200 個自由區及超過 680 位講者參加，包括阿聯、亞美尼亞共和國、烏拉圭、奈及利亞、巴拿馬、哥倫比亞、墨西哥、大陸、印度、塞爾維亞、美國等主要經濟體，分享其對於全球自由區與貿易相關重要議題之看法，並期許本次大會能促進不同自由區間合作、發展與交流，以及吸引更多商業及工業投資等正面成效。

世界自由貿易區組織執行長 Hamrouni 博士亦於會中說明世界自由貿易區組織所提供之服務、會員權益及迄今執行成果如下：

自 1959 年愛爾蘭香農(Shannon)機場成立首座自由區，迄今自由貿易區的概念已遍及全球 3,500 個自由區，為使自由區具有影響力，於 2014 年 5 月 19 日成立世界自由貿易區組織迄今，在 14 個初始會員帶領下，成為全球第 1 個聚集各地自由區之全球性組織，彼此分享交流自由區之觀點、貢獻、經驗、知識與成就

等，並協助該組織持續正向發展。

(一) 組織目標(Objectives)

1. 匯聚區域、國家、地方政府與地區型自由貿易協會、自由區顧問公司、自由區業者、政府組織及國際貿易組織等單位，進行知識交流、教育訓練，並促進網絡與企業發展。
2. 提供一個全球性自由區論壇，藉由獨家深入之研究與觀點，使參與者學習成長並繁榮發展。
3. 蒐集、創新、擴展及宣導有關全球自由區之知識。
4. 提升自由區洞察全球趨勢，定位其對當地經濟之價值貢獻，並促進其永續經營。
5. 創造同類自由區之最佳典範，以增強全球與當地市場之經濟生態系統，並作為建置與管理自由區之指導方針。
6. 代表自由區及其會員之集體利益，向國際組織及政府倡議，並協助促進大眾對於自由區之認知。
7. 透過教育訓練、實體與電子資源等方式，為會員、合作夥伴及觀察員提供專業之營運、行政、教育及網絡服務。
8. 提供全球發展中之新自由區支持與建議。
9. 成為全球性自由區與相關議題之領導者。

(二) 會員服務(Membership Services)

世界自由貿易區組織提供之服務係為協助會員達成自己的戰略目標，增強營運成果、提供新觀點及學習全球最佳實際案例等，並提供會員及合作夥伴包括知識、網絡及輔助等三類專屬服務，說明如下：

1. 知識(Knowledge)

   針對全球自由區建立最完善的知識庫，可提供會員及合作夥伴關鍵解析，瞭解經濟及經營策略，該知識庫係源自世界自由貿易區組織旗下觀測所(Observatory)、自由區線上開放資料庫(FZ-PEDIA)及開放大學(Open University)。

(1) 世界自由貿易區組織觀測所(World FZO Observatory)

觀測所為一蒐集與分析全球自由區原始資料之專門研究中心，致力於提供會員接觸及支持國際政策制定者之必需工具，發佈與自由區相關之每月時事新聞(newsletter)，與自由區貿易、外國直接投資(FDI)、產業發展及統計相關之季報，亦正著手編撰一全球自由區及其相關數據之地圖集。

每年出版自由區展望年報，涵蓋專家對全球自由區發展趨勢之前瞻見解。

(2) 自由區線上開放資料庫(FZ-PEDIA)

FZ-PEDIA 係針對全球自由區及經濟特區進行研究、提供專家觀點及分析之線上開放資料庫，全數內容經由同業之國際學術及商業界審核，再提供正式會員、準會員及合作夥伴使用。

(3) 世界自由貿易區組織開放大學(World FZO Open University)

開放大學係為一研究中心及自由區相關專業人士之高階教育中心，與世界自由貿易區組織之重要戰略夥伴合作，提供最佳之管理培訓，如：專業報導、案例研究、工具套件、專家諮詢及線上研討會等。

2. 網絡(Network)

世界自由貿易區組織之會員可藉由定期交流活動、全方位 B2B 線上網絡及服務市場等方式，使自由區內相關參與者能與業內之專家、顧問及國際政策制定者建立聯繫網絡；此外，每年定期舉辦自由區年度國際會議及展覽會，邀集全球自由區專家學者與會。

(1) 自由區企業電商平臺(FZ B2B)

FZ B2B 平臺係為尋找與聯繫全球各地企業夥伴而建立之商業工具，可透過在該平臺管理個人資料來拓展社交網絡及知名度，與全球自由區同業保持聯繫，並可依區域及部門尋獲新商機及目標客戶。

(2) 自由區市場(FZ Marketplace)

自由區市場內含準會員之各種提議，全球最佳自由區之具體應用、產品、解決方案及服務等，有助於自由區蓬勃發展、邁向全球化並發揮最大潛力。

(3) 自由區展望事件(FZ Outlook Events)

世界自由貿易區組織規劃各種收益良多之交流機會，包括高階會議與專題講座、小組會議、企業工作坊及其他形式等。

3. 輔助(Support)

提供未來就緒自由區計畫(Future Ready Free Zones Program)、認證獎勵及強化營運績效之創新措施等服務，包含國際認證、自由區之社區發展計畫、自由區達成綠色狀態(green status)相關輔助與諮詢以及開發智慧數位自由區等。

(1) 未來就緒自由區(Future Ready Free Zones)

未來就緒自由區主動提供一個變革框架，從行政簡化及未來基礎設施到為社區提供最佳服務及輔助資源，得以利用新興趨勢，適應全球經濟的快速變動，並成功找到該自由區現在與未來之自身定位。

技術就緒區計畫(Tech-Ready Zone Program)，係指依當地需求提供 e 化管理服務及智慧區功能，使業務生效及全部流程朝向線上化，毋需實體文件，後續將更進一步提供智慧區之認證。

世界自由貿易區組織之旗艦發展計畫(World FZO’s Flagship Development Program)，係利用首選之夥伴及資源提供之學習及發展工具，包括工具包、手冊及超過 500 部企業學習影片等，俾使自由區擁有知識、洞察力及把挑戰轉為機會之技能。

(2) 證書與獎章(Certifications & Awards)

世界自由貿易區組織認證計畫(World FZO Certification Programs)可協助自由區衡量其永續、安全、環境及法規等面向之進展與成果，並透過該組織與多邊組織、國際主要顧問公司之合夥關係，協助指導自由區並獎勵其執行成果，未來將對智慧自由區、

安全自由區及綠色自由區進行相關認證。

(3) 創新(Innovation)

自由區對於全球貿易具有重要戰略性，有助於世界各地創新快速成長企業之發展，而這些企業可創造就業機會及拓展經濟。

世界自由貿易區組織將協助對自由區之政策及計畫提出鼓勵與創新，並創造下一個企業成功案例。

四、 專題講座(Programs)

本次大會就「全球價值鏈」研討治理、政策啟發、跨國企業遠景、自由區未來機會及未來實踐成為最佳自由區藍圖等議題，辦理 5 場專題講座，除強調以自由區參與全球價值鏈之重要性，亦探討政府、營運機構及企業合作推動自由區相關監管策略等。

謹將由世界自由貿易區組織資深專案人員 Saleh 女士、知識長 Guruswamy 博士及執行長 Hamrouni 博士共同發表之「未來實踐成為最佳自由區(Next Practices, Beyond Best in Class Practices)」一文，重點摘要如下：

隨著全球社會政治及經濟格局不斷發展，多數國家政策制定者需同時面對國內政治壓力與履行國際義務，並協調二者間衝突，自由區亦需面臨類此情形，爰透過本研究報告，訪談相關領域專家及具影響力人士等，提供自由區知識管理單位因應對策。有關主要訪談議題及成果如下：

(一) 自由區的增長與全球經濟成長連結性

全球經濟成長與自由區增長呈正相關係，未來仍會共同增長；然而，世界各地自由區之經濟增長動能、政策環境、獎勵機制因地制宜，成長情形亦將不同。以非洲為例，目前計有約 700 個自由區，預測未來 5 年內將達 1,500 個，各國現將非洲視為下一個征服之前線，未來將為其帶來經濟連鎖效益。

除了地區位置差異外，過去著重技術領先之傳統行業，現今比重逐漸轉向服務業(如電子商務)，因此，自由區需有效應用現代技術，尤其是資通訊科技(Information and Communication Technology, ICT)，以滿足消費者增長與多樣化需求，縮短物流供應鏈，並藉由去中介化(Disintermediation)拉近生產者與消費者之

關係獲取價值，換言之，自由區需精進成為技術就緒區。

商品貿易雖仍具重要性，無論是原料、中間產品或成品，在企業經營上仍占有一定份量，但不同的是，因應消費者需求改變，商品貿易將越趨向增值型或高價值之商品。

(二) 收斂真實性

透過資通訊科技(ICT)有機會協助自由區間良好商業發展，惟此技術涉及到自由區當地之法規面、政策面、管理面及行政面等框架，未來資通訊科技在自由區之應用與發展，仍需進一步觀察，俾利走向未來。

(三) 自由區之企業規模

以自由區而言，小型企業具直接服務顧客導向，大型企業能創造較多就業機會、產生高收益，爰應同時扶植小型與大型企業，惟尚需政府政策、監管能力、勞動條件、應用新技術程度、融資方案物流等各方面相輔相成，並促進小型與大型企業合作共同成長，俾使擴展自由區整體規模。

(四) 自由區受全球併購潮(M&A)之影響

全球性、區域性或跨國性企業併購，整合企業間之能力與技術，而驅動併購潮之因素有市占率最大化，技術取得等。有關自由區受併購潮影響程度，專家認為併購有助於企業整合，係一受歡迎之趨勢，建議適時輔助此併購活動；此外，合作亦是另一種作法，最終適者生存。

(五) 驅動競爭優勢之因素

專家認為，透過技術之應用是驅動自由區具備競爭優勢之關鍵因素，尤以服務領域方面之技術；此外，擁有廣泛之產品知識、市場知識與預測未來趨勢之能力等，亦將驅使自由區提升競爭力。

(六) 自由區滿足未來客戶需求

迄今自由區概念持續推展，多數自由區仍處瞭解並滿足客戶需求階段，而客戶需求受到自由區內部業務運作或企業外在市場環境等因素，未來將更為廣泛且

多樣化。因此，自由區需持續促進永續環境，朝向「綠色與智慧自由區(Green and Smart Free Zones)」發展，以客戶為中心，加速經商便捷化(Ease of Doing Business, EoDB)。

(七) 公私合夥(Public Private Partnership, PPP)關係之重要性

由於自由區係境內關外，需要政府成為夥伴，以確保經營環境之永續、安全及保安，而以公私合夥模式開發自由區已逐漸受到重視，可採取政府財政與資源之參與，創造正向經營環境相關政策，同時私部門引入資本投資及技術等形式。

最後，隨著全球社會政治及經濟格局變動發展，自由區需預測未來新趨勢並即早擬定因應對策，需聚焦下列事項：

(一) 採用新科技，成為技術就緒區。

(二) 預測顧客未來需求，並主動提供合適服務。

(三) 發展成為環境友善之綠色自由區(Green Zones)。

(四) 持續確保安全及保安之營運環境。

(五) 發展自由區間之合作機制，共同獲利。

(六) 促進公私部門間協力合作。

(七) 鼓勵創新，發展企業所需人力資源。

五、 工作坊(Workshops)

本(2016)年度大會安排 7 場次工作坊進行意見交流，有關自由區在促進全球價值鏈所扮演之角色、自由區之獎勵措施及綠色自由區認證計畫等議題，重點摘要如下：

(一)自由區在促進全球價值鏈所扮演之角色(Role of Free Zones in Facilitating Global Supply Chains)

本研究由世界自由貿易區組織執行長 Hamrouni 博士及投資諮商協會(Investment Consulting Associates, ICA)勞倫斯先生共同著作，摘要如下：

隨著全球化及各國市場逐漸整合為全球市場之趨勢，全球供應鏈(Global Supply Chains, GSC)已成為一重要議題，尤以跨國企業(Multinational

Enterprises, MNE's)是一個全球生產網絡很好的案例，在原料生產、加工、組裝、銷售等一系列活動可能橫跨不同國家、不同地點的情況下，如何尋求資源利用及相關利害關係者效益之最大化，是需要協調與整合整個供應鏈。

依據世界銀行(World Bank)旗下國際金融公司(IFC-World Bank)研究報告[1]指出，在許多行業，物流成本已超過商品本身製造成本，因此，應著重於如何透過供應鏈管理及投資地點之選擇等優化供應鏈措施，以提供企業更佳之全球供應鏈與物流服務。

而自由區正可藉由提供下列服務，降低企業自身的物流成本，提升其在全球供應鏈之競爭力：

1. 提供全年無休與專門服務自由區之所在地海關及專業報關人員：企業可每週 7 天、每天 24 小時隨時進出口貨物(Import and Export Cargo 24/7)。
2. 消除或降低關稅相關稅捐(Duties and Taxes)：進口、儲存、加工、製造、處理及(復運)出口貨品更具成本效益，有助於改善企業現金流。
3. 為申請最低關稅或運價，貨物可能經加工或操作(Manipulated)以改變產品最終之形狀或重量。
4. 推動精簡行政流程：簡化通關措施及快速通關，降低行政作業負擔及減少文書處理作業(如：法規規定之進出口文件)。
5. 允許貨物無期限限制儲存於自由區：企業可更彈性配送貨物，進而鼓勵企業尋找最佳市場，使企業儲存超過地主國(Host Country)所需之進口配額(即增加存貨量)。
6. 允許進儲自由區貨物隨時取出與利用：進儲貨物可作為企業擔保品，或利用倉庫作為展覽陳列空間。

另外，本研究為探究自由區如何促進全球供應鏈之實務經驗，亦訪問相關領域之專家學者及企業從業人員等，重點摘要如下：

初期數個國家間進出口貿易活動，逐漸形成全球商品鏈及經濟群聚效應，後隨著許多國家推動貿易自由化及全球化之政策，兩者結合形成全球供應鏈，而全球供應鏈概念最早出現於 1985 年(日本將商品製造外包至泰國)。

專家們咸認為產生全球供應鏈之因素，包含持續優化業務作業流程、改

[1] Akinci , G. FIAS: Leaders in Investment Climate Solutions, IFC-World Bank.

善營運成本、持續提升股東價值(Shareholder Value)、獲利最大化，科技技術之進步、政府政策及財務等在內；對於發展中國家而言，自由區有助於提高經濟價值，驅動全球供應鏈及全球生產網絡(Global Production Network)，特別是製造領域，而最佳案例屬科學園區(Science Parks)。

全球生產網絡影響國家之工業及經濟活動，企業會評估其戰略性或危險商品適合在國內關稅區或自由區生產、製造，如：自由區如能提供企業有關乾散雜貨及液態貨品不同之物流服務方案，將是影響該企業進駐之關鍵因素；專家們亦認為，自由區應制訂統一標準並致力提供永續供應鏈。

在審視全球供應鏈網絡，區域係為另一個重要影響因素，如：選擇在北美製造，主要係就近消費地；亞洲在中國大陸帶領及具有競爭力之勞動成本等條件下，則成為全球主要製造地。

由於自由區目前在數量及規模上持續擴大，所面臨的挑戰包括如何使自由區更具成本效益與提高能源效益、如何確保永續發展、如何提升企業社會責任(Corporate Social Responsibility, CSR)、如何因應氣候變遷之不利影響、如何促進技術進步(如 3D 列印技術)等，還可能需面對財政及法規綜合性問題、貿易保護主義及保安相關議題等。

因此，世界自由貿易區組織倡議自由區未來發展計畫(Free Zone of the Future Program, FZF)，該計畫目的係為構建自由貿易整體能力，除可使自由區業務成長茁壯，亦有助於相關決策者、投資者及金融業者，以迎向永續且繁榮的未來。

(二)自由區之獎勵措施：確認由過渡到未來之自由區(Incentives Awarded across Free Zones: Confirming the Transition to “Free Zones of the Future?”)

本研究由投資諮商協會(Investment Consulting Associates, ICA)勞倫斯先生及世界自由貿易區組織知識長 Guruswamy 博士共同著作，摘要如下：

在過去數十年，自由區包含加工出口區、自由貿易區、經濟特區及群聚專業區(cluster-based Specialized Zones, SZs)等在內，其中經濟特區及群聚專業區係為新一代自由區；而對於進駐這些不同名稱自由區之企業，相較於國

內，享有優惠關務及管制鬆綁等特許待遇之共同特點。

本研究為確認自由區提供之獎勵措施(包含優惠措施)能否吸引以地區為基礎之企業(Zone-based Companies)進駐，相關獎勵措施能否顯示由傳統型自由區正移轉至新一代自由區。研究資料選用 IncentivesMonitor.com 資料庫，計有全球 24 個國家各類自由區已實際執行之 966 筆獎勵措施，統計時間自 2010 年 1 月至 2016 年 3 月，如表參-4 所示。

由統計資料顯示，政府及自由區主管機關在 7 年間已提供金額達 4.212 億美元之獎勵措施，平均每筆獎勵措施約 95 萬美元；而接受獎勵措施之企業則創造 227.9 億美元之資本投資及 20.4 萬就業人口，即每項激勵措施可為自由區創造 2,660 萬美元之資本投資及 212 個新就業機會。其中，2011 年與 2015 年獎勵措施相對較少，以 2015 年資料而言，獎勵措施雖有減少，然每項獎勵措施之平均金額呈現成長，且所帶動資本投資亦相對較高，顯示政府及自由區主管機關更審慎挑選獎勵措施，並將經費挹注於重點項目。

表 參-4　歷年自由貿易區主要獎勵措施統計

年度	獎勵措施數量(筆)	獎勵措施價值(美金；百萬元)		資本投資價值(美金；百萬元)		創造新就業人口(人)	
		總計	平均	總計	平均	總計	平均
2010	146	$130.9	$1.03	$2,708.0	$22.0	17,890	123
2011	115	$73.0	$1.55	$1,649.2	$16.7	41,053	357
2012	215	$49.1	$0.41	$4,051.7	$22.0	34,421	160
2013	185	$90.7	$0.93	$4,276.9	$24.9	45,391	245
2014	144	$62.4	$1.89	$2,696.4	$19.7	23,993	167
2015	118	$11.0	$1.57	$6,961.1	$62.2	29,308	248
2016	43	$3.9	$3.06	$449.4	$14.5	12,360	287
總計	966	$421.2	$0.95	$22,792.7	$26.6	204,416	212

資料來源：Laurens Van der Schoor & Mohan G. (2016). Incentives Awarded across Free Zones: Confirming the Transition to “Free Zones of the Future?” World FZO Observatory Research Publication.

由圖參-1 可知，在 966 筆獎勵措施樣本中，近 90%係採用稅收方面之獎勵，同時實施稅收及預算獎勵僅占 3%，然其占總金額約 12.4%。

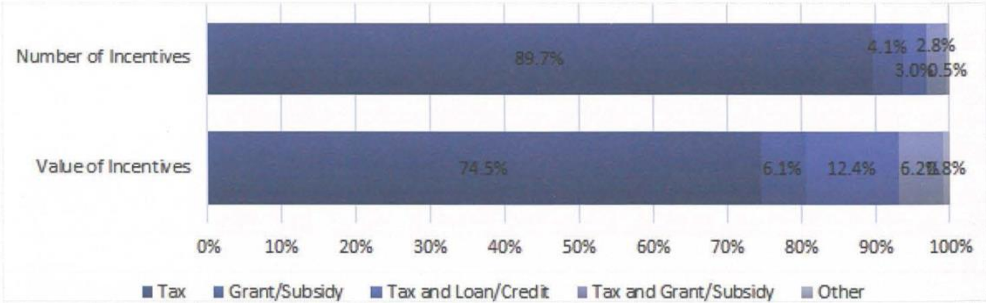


圖 參-1　獎勵措施數量及價值分布情形

資料來源：Laurens Van der Schoor & Mohan G. (2016). Incentives Awarded across Free Zones: Confirming the Transition to “Free Zones of the Future?” World FZO Observatory Research Publication.

傳統自由區主要目標係為創造短期經濟成長，如增加投資、出口、外匯收入及稅收等；而新一代自由區則更為動態並作為長期戰略思考框架，可導入新政策或進行實驗室測試等，俾促進經濟多元發展，結構轉型，部門升級，增加競爭力及技能發展。

針對企業投資自由區給予獎勵措施之政策，通常係為促進經濟成長，由圖參-2 可知，近一半(45%)自由區係透過吸引投資及創造就業機會，帶動區域及當地整體發展；25%自由區獎勵措施，除促進區域及當地整體發展以外，亦發展當地勞動力；18%自由區獎勵措施，則同時涵蓋促進區域及當地整體發展、吸引資本投資及發展當地勞動力等多重目標；僅有少數(約 1%)獎勵措施，係透過就業及人力資源之支援，帶動當地勞動力發展；總而言之，自由區優惠政策已從推動一個或數個促進短期發展策略，逐漸著眼於吸引投資並創造就業機會。

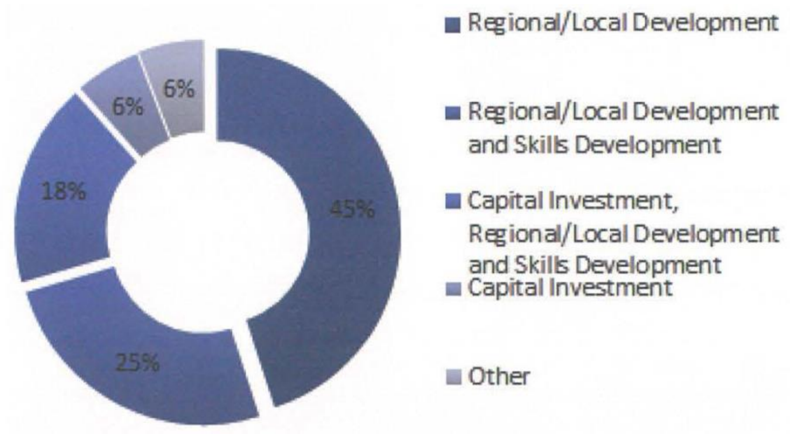


圖 參-2　每個獎勵措施之目標分配情形

資料來源：Laurens Van der Schoor & Mohan G. (2016). Incentives Awarded across Free Zones: Confirming the Transition to “Free Zones of the Future?” World FZO Observatory Research Publication.

此外，自由區除吸引傳統出口導向之製造業，亦同時吸引國外及國內投資，絕大部分獎勵措施，係針對綠色永續之製造業給予財務優惠措施，其目的是為了實現吸引資本投資及創造就業等短期經濟效益，而非促進當地勞動力發展等長期經濟多元化與轉型；整體而言，獎勵措施數量雖下降，但政府挹注於獎勵措施之預算則為成長，顯見政府與自由區主管機關更戮力提供業者獎勵措施。

(三)綠色自由區認證計畫(Green Free Zone Certification Programme)

本認證計畫係由杜拜碳(Dubai Carbon)進行簡報，其成立於 2011 年 1 月 18 日，係源自杜拜最高能源委員會與聯合國開發計畫署(United Nations Development Programme, UNDP)共同簽署成立之一公私合夥(PPP)研究單位，總部設於杜拜，致力於溫室氣體(Greenhouse Gas, GHG)減排措施相關研究與執行，正逐步擴充範疇於整個波斯灣國家(GCC countries)。

世界自由貿易區組織(World Free Zones Organization)與杜拜碳共同合作，規劃推動「綠色自由區認證計畫(Green Free Zone Certification Program)」，對自由區在環境友善方面之成果給予認證。

該計畫組織成員可透過其官網，使用目前研發之多類別自評工具(包含

後端多準則決策分析功能)，藉分析成果(如圖參-3 所示)瞭解自由區目前環境友善狀態，主要可分為綠色社區、設計與建設、能源、運輸、天然資源、水、綠色運營等 7 個與全球綠色經濟有高度相關的構面。

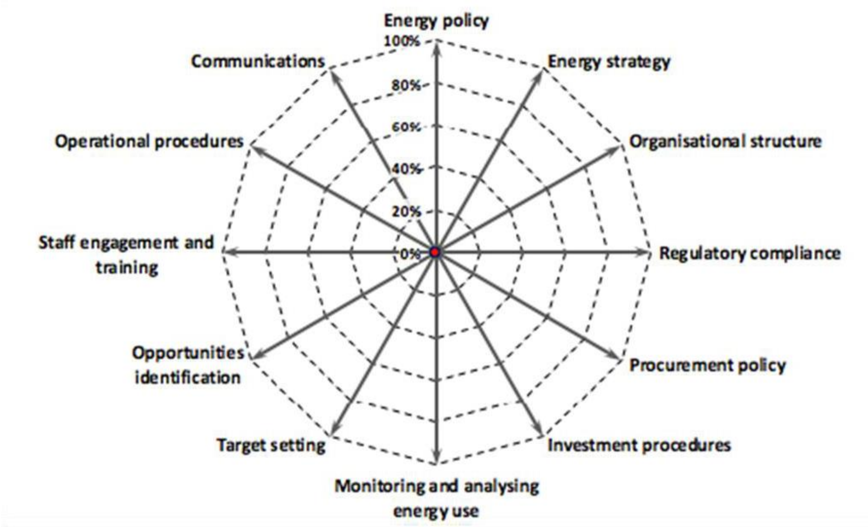


圖 參-3 多類別評估工具

六、 會員大會(General Assembly)

目前我國有桃園國際機場股份有限公司、臺灣港務股份有限公司及經濟部加工出口區管理處等 3 個機關(構)係為世界自由貿易區組織正式會員，具有投票權，交通部航港局則為該組織之合作夥伴及觀察員，不具投票權。

今(2016)年度桃園國際機場股份有限公司及臺灣港務股份有限公司雖因公不克前往，惟桃園國際機場股份有限公司於大會指定期限前完成投票權授權程序，爰經濟部加工出口區管理處憑出具其授權書代行使其投票權。有關會員大會相關議程與決議如下：

(一) 時間：2016 年 5 月 11 日下午 2 時至 3 時

(二) 地點：杜拜凱悅飯店

(三) 議程：

1. 報告事項

   (1) 2015 年度業務報告

   (2) 2015 年度財務報告。

   (3) 2016 年度業務報告及財務預算。

2. 討論事項：

(1) 案由 1：2015 業務報告及財務報表，提請承認案。

決議：照案通過。

(2) 案由 2：2016 預算，提請承認案。

決議：照案通過。

(3) 案由 3：選舉董事會主席案。

決議：由 Dr. Mohammed Alzarooni 當選。

3. 宣布事項：世界自由貿易區組織年度大會舉辦地點為連續 2 年在阿聯(杜拜)，1 年在其他國家舉辦，以 3 年為一循環，爰 2017 年度大會將在哥倫比亞共和國舉辦。

七、 展覽會(Exhibitions)

本(2016)年度大會之展覽會於 5 月 9 日至 11 日舉辦，共計有 13 個參展單位，包括巴拿馬、哥倫比亞及阿吉曼酋長國等國家整體投資環境，杜拜新南城(Dubai South)、杜拜矽綠洲(Dubai Silicon Oasis, DSO)、杜拜國際金融中心(Dubai International Financial Centre, DIFC)、杜拜機場自由區機構(Dubai Airport Free Zone Authority, DAFZA)等當地自由區投資指南，杜拜電力及水利局(Dubai Electricity and Water Authority, DEWA)、安侯建業聯合會計師事務所(KPMG)、中東企業行銷諮商及雲端服務公司(NSI)及贏騰規信全球貿易管理公司(Integration Point)等之企業經營支援單位業務推廣，展示世界自由貿易區組織之相關電子商務系統，並藉此機會積極宣傳杜拜主辦 2020 年世界博覽會。

八、 活動照片

圖 參-4 本(2016)年度會場外一隅

圖 參-5 本(2016)年度大會-阿聯經濟部長致詞

圖 參-6 本(2016)年度大會-主席致詞

圖 參-7 本(2016)年度大會-執行長展示世界自由貿易區組織成果

圖 參-8　本(2016)年度大會-專題講座

圖 參-9 本(2016)年度大會-工作坊

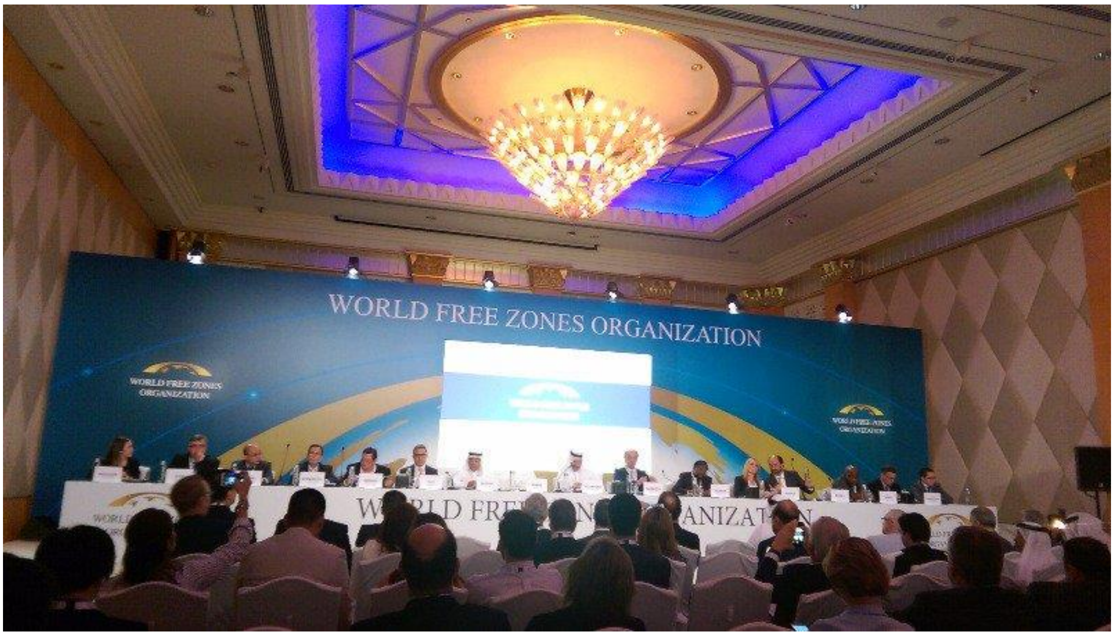


圖 參-10 本(2016)年度大會-會員大會

圖 參-11 我國團員參加本(2016)年度大會合照

肆、拜會單位紀要

一、世界自由貿易區組織(World FZO)

在阿聯政府積極推動下，世界自由貿易區組織於 2014 年 1 月 14 日在瑞士日內瓦註冊，2014 年 1 月 19 日由 14 個創始會員組成董事會通過組織章程，於 2014 年 5 月 19 日在杜拜正式設立總部，由杜拜機場自由區局長 Dr. Mohammed Alzarooni 擔任主席，係為一關注全球各地自由區之非營利組織。

該組織宗旨係期使各國能藉自由區吸引外商直接投資(FDI)及建立安定且健全之經濟發展模式，亦盼能增進各國對自由區之認知及瞭解，俾促進全球自由區營運管理者之交流與相互學習。

世界自由貿易區組織現行董事會由美國(2 位)、印度、摩洛哥、奈及利亞、哥倫比亞(2 位)、烏拉圭、西班牙、法國、愛爾蘭、阿聯(2 位)等 11 國共 13 位成員組成。截至 2015 年底，已有 46 國家共計 189 個會員加入該組織，各國成員包括自由貿易區、加工出口區及經濟特區等。

該組織開放自由區相關之個人或組織(包含公私立組織)入會，其會員分為下列 3 類：

1. 正式會員(Voting Members)

   申請入會對象包含公認之自由區及自由區協會等，可獲得世界自由貿易區組織全數會員服務，並於每年年會及展覽會，享有董事會成員任用與否之投票權。

2. 準會員(Associate Members)

   申請對象係為支持自由區成立或實際工作於自由區等之個人、企業用戶及顧問，此類會員有機會獲得全數會員服務，惟於每年年會及展覽會，無董事會成員任用與否之投票權。

3. 合作夥伴及觀察員(Partners & Observer Members)

   申請對象係為參與國際貿易及海關業務之政府組織、半政府組織及非政府組織，此類會員將個別受董事會邀請參加組織之活動，並可獲得選擇性會員服務。

今(2016)年度交通部航港局及經濟部加工出口區管理處分別以合作夥伴及觀察員、正式會員等會員身分，由交通部航港局祁局長率團參加世界自由貿易區組織第二屆大會，特藉此難得機會拜會該組織主席 Dr. Mohammed Alzarooni、執行長 Dr. Samir Hamrouni 及董事 Nasser Al Madani 等人，除誠摯感謝主席邀請與會外，宣傳我國自由貿易港區發展現況與今(2016)年加工出口區將慶祝建區 50 週年等，雙方並就全球自由區發展現況及未來規劃等交換意見，亦獲執行長口頭允諾來臺參訪。

表 肆-1 世界自由貿易區組織會晤代表名單

職銜	姓名
主席	Mohammed Alzarooni
執行長	Samir Hamrouni
董事	Nasser Al Madani

圖 肆-1 與世界自由貿易區組織主席等人合照

圖 肆-2 與世界自由貿易區組織董事合照

圖 肆-3 與世界自由貿易區組織執行長合照

圖 肆-4 與世界自由貿易區組織主席等人交換意見

二、 杜拜環球港務集團(DP World)

杜拜環球港務集團(DP World)是阿拉伯聯合大公國的國有企業，由杜拜港務局(DPA)和杜拜港務國際集團(DPI)於 2006 年合併而成。杜拜環球港務集團除經營阿拉伯聯合大公國港口外，亦以合資經營或自營的方式，拓展在大陸、香港、韓國、荷蘭、倫敦等國際港口的貨櫃碼頭業務，提供航商船舶靠泊及裝卸服務，在 2014 年全球貨櫃碼頭經營公司排名第 4 名。

該集團是全球貿易的主要推動者和全球物流供應鏈之參與者，旗下有 52 個貨櫃碼頭公司、4 個自由區及 3 個物流中心，辦事處遍布全球 30 個國家，有來自 110 個國家超過 37,000 名員工的專業團隊，並在全球六大洲 40 個國家受超過 50 個相關企業支持，串聯 77 個多樣化投資組合經營貨櫃碼頭，目標是在全球範圍內創造出高效率、便捷、安全的貿易解決策略。

貨櫃裝卸是該集團的核心業務，2015 年處理 6,170 萬 TEU，占整體收入的四分之三以上，因應市場需求，預計 2020 年碼頭總容量將自 7,960 萬 TEU 提升至超過 1 億萬 TEU。

為提供客戶更周全的服務，2015 年投資美金 14 億元資本在阿聯、英國、印度及土耳其等國，並投入美金 4 億元進行策略性併購，包含阿聯的世界經濟區、德國的曼海姆及斯圖加特碼頭、加拿大魯珀特王子港的貨櫃碼頭(跨太平

洋貿易的重要門戶港)等地。

此外，該集團目前已部署超過 13,000 TEU 容量超大型油輪可通過之亞歐貿易深水航道，在南韓、大陸、阿聯、比利時、法國及英國都具有處理超大型油輪的能力，而杜拜的傑貝阿里港則能同時處理 10 艘超大型油輪。

杜拜環球港務集團碼頭正逐步發展無人化貨櫃場及船舶裝卸作業，兼顧效率、安全與環保節能之需求，並有獨特的船務資訊系統平臺，包含航商選定、訂艙、運費收付等，均在該平臺操作並收取手續費。

另自 2015 年起該集團陸續在建築物屋頂建置太陽能板，達成每年減少排放 19,701 噸 CO^2；2015 年工傷引致損失工時比率為 4.3，較 2014 年下降 0.9，顯見亦致力於綠能減碳與降低工安。

會中我方除感謝執行長及副總裁接待外，亦簡介國內航港業務推展現況，誠摯邀請杜拜環球港務集團來臺參訪並獲口頭允諾，雙方並就港區發展現況及未來規劃等進行意見交流。

其中，杜拜環球港務集團對我國針對港區業者及人員進行教育訓練之作法深感興趣，而該集團亦分享其重要成功因素有二：一是為了滿足直接之船務公司及間接之通關、碼頭、運輸、物流配送等廣大顧客之需求，該集團於國外重要航運港口併購設置碼頭，俾利提供一條龍服務，創造高效率、便捷、安全之全球貿易解決策略；二是將傑貝阿里港物流通道無縫連接阿勒馬克圖姆國際機場(AMIA)，結合海空自由區與物流整合平台，提供一站式運籌服務，建立單一海關保稅區域，打造一海空聯運基地，以節省貨物落地時間，加速推進海空雙向貨物流，保證 3 小時內完成通關轉運事宜。

表 肆-2 杜拜環球港務集團會晤代表名單

職銜	姓名
執行長	Ibrahim Eisa Alhammadi
商業公司/副總裁	Simon Pitout
商業部門/部長	Abdulla Bin Damithan
商業部門/高階經理	Youhan Doctor
商業部門/經理	Chat. Vikram Manchanda
商業部門/副理	Mohammed Hassan

圖 肆-5 與杜拜環球港務集團會晤合照(1)

圖 肆-6 與杜拜環球港務集團會晤合照(2)

圖 肆-7 致贈杜拜環球港務集團禮品(1)

圖　肆-8 杜拜環球港務集團致贈我方禮品

圖　肆-9 致贈杜拜環球港務集團禮品(2)

圖 肆-10 與杜拜環球港務集團代表合照

三、 杜拜台灣貿易中心、陽明海運集團、長榮海運(股)公司及萬海航運(股)公司

杜拜台灣貿易中心係中華民國對外貿易發展協會(簡稱外貿協會或貿協)派駐中東及亞西地區之單位，而外貿協會係為經濟部結合民間工商團體設立之公益性財團法人，除臺北總部外，設有新竹、臺中、臺南及高雄等 4 個國內辦事處與遍佈全球 60 個駐外據點，並相繼設立台灣貿易中心、台北世界貿易中心等姐妹機構，形成完整的貿易服務網，是業者拓展貿易的最佳夥伴。以協助企業拓展對外貿易。

長榮海運股份有限公司、陽明海運集團及萬海航運股份有限公司等係國內排名前茅之航運業者，根據 2016 年 5 月 9 日 Alphaliner 最新運力數據顯示，長榮海運股份有限公司排名全球第五，陽明海運集團排名為第十，萬海航運股份有限公司則排名第十九。

藉此次赴杜拜參加世界自由貿易區組織第二屆大會之際，與杜拜台灣貿易中心、長榮海運股份有限公司、陽明海運集團及萬海航運股份有限公司駐當地

代表等進行意見交流，瞭解中東地區經貿發展趨勢與航運經營環境、當地貨櫃航運及碼頭事業之運作情形等，雙方交談甚歡，收穫良多，亦在過程中提供諸多協助。

表 肆-3 會晤杜拜台灣貿易中心、陽明阿拉伯聯合大公國公司、長榮海運股份有限公司及萬海航運股份有限公司當地代表名單

企業名稱	職銜	姓名
杜拜台灣貿易中心	主任	張世朋
陽明阿拉伯聯合大公國公司	總經理	周俊男
陽明阿拉伯聯合大公國公司	財務代表	劉昱志
陽明阿拉伯聯合大公國公司	運務代表	薛俊倫
長榮海運股份有限公司	中東辦事處首席代表	徐偉濱
長榮海運股份有限公司	駐中東辦事處代表	林永祥
萬海航運股份有限公司	中東地區總代表	林怡德
萬海航運股份有限公司	中東地區船東代表	曾能蔚

伍、心得及建議

一、心得

(一) 本次參訪主要感受為高度國際化、高度理想與高度企圖心，對於官方與民間企業人員之積極與親和態度更是印象深刻，杜拜由上至下明確之發展方向、企圖心與行政效率等，實為我國自由港區及加工出口區發展應認真思考並學習之對象。

(二) 自由區是杜拜當地發展之引擎，從不停止投資及建設，並提供單一窗口服務，目前阿聯境內有近 40 個自由區，另有 10 個自由區正處發展階段，其中不少自由區是為特定產業而設立，如：金融、物流、媒體、醫療保健、紡織及汽車等產業。

(三) 自由區是國內廠商融入全球供應價值鏈之主要場域，截至 2015 年底，已有 46 國家共計 189 個會員加入世界自由貿易區組織，會員數逐年成長，

是一聯結全球自由區之捷徑，應與該組織建立良好交流關係，藉以引入跨國企業投資。

二、 建議

(一) 本(2016)年度世界自由貿易區組織大會有許多開發中國家參與及提問，爰建議我國後續可持續參與世界自由貿易區組織年度大會，並就我國自由區如：加工出口區、科學園區、自由貿易港區及農業科學園區等之發展經驗，提出貢獻及分享。

(二) 世界自由貿易區組織規劃推動綠色自由區認證計畫，未來將對智慧自由區、安全自由區及綠色自由區進行認證並頒發獎章，建議可先藉由該組織所提供之知識、網絡及輔助服務，瞭解我國自由區在永續、安全、環境及法規等面向之進展與成果，俾利未來爭取相關認證，並拓展國際能見度。

(三) 未來我國將自貨品貿易自由化之自由港區、加工出口區，進展至服務貿易自由化之自由經濟區，再對外積極融入全球區域經濟整合，經由簽署多邊或雙邊協定，達到全面自由化，爰建議我國可以世界自由貿易區組織作為與國際企業資源鏈結之一網絡平臺，多加運用該組織提供之各項服務，藉以鏈結國際大廠資源，強化廠商佈局全球供應鏈，並加速投資環境之自由化與國際化。

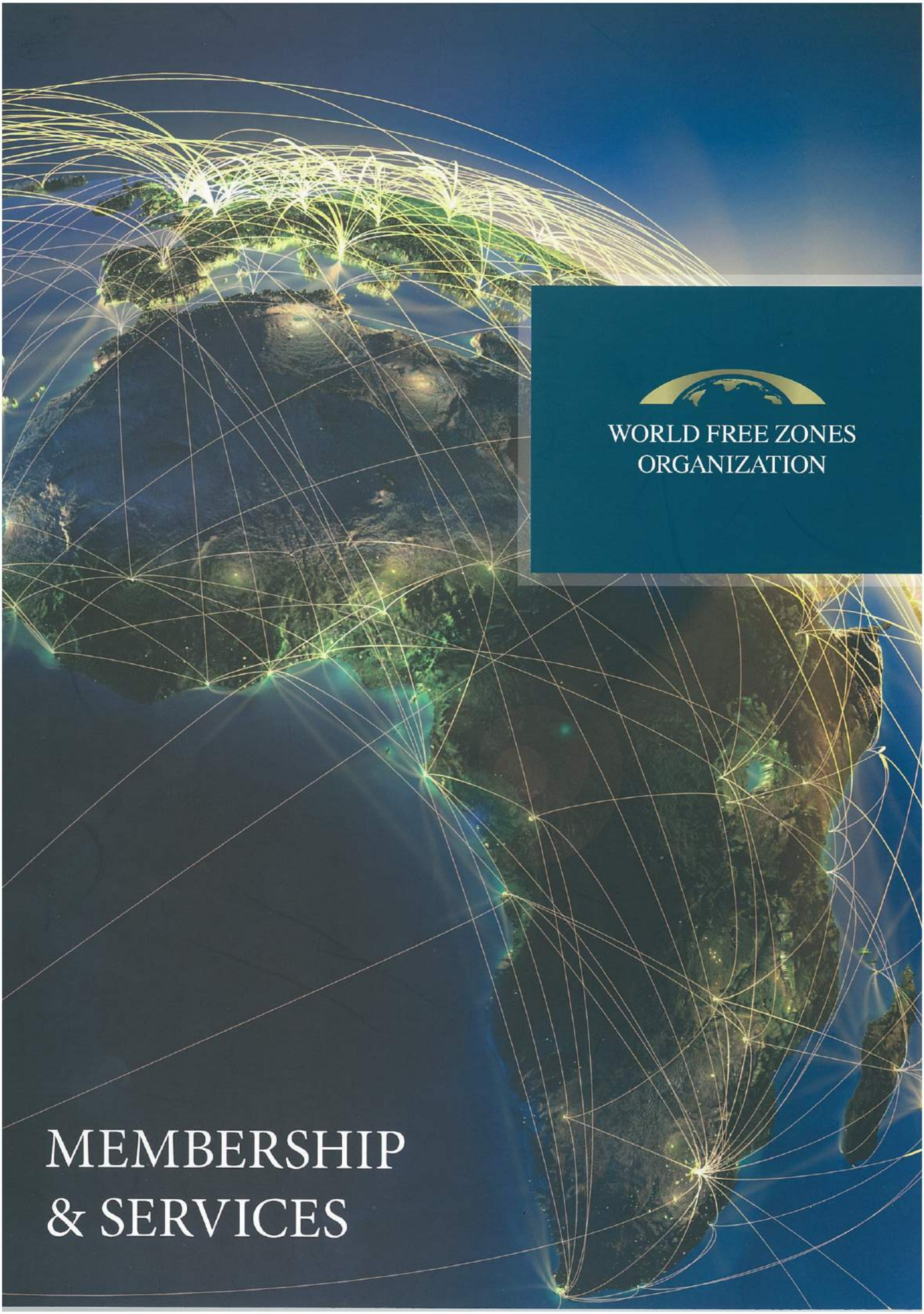
陸、附錄

一、訪團成員名單

表 陸-1 我國參加世界自由貿易區組織第二屆大會組團名單

訪團成員	單位	職稱	姓名
團長	交通部航港局	局長	祁文中
團員	交通部航港局	組長	饒智平
團員	經濟部加工出口區管理處	科長	梁麗琴

二、 會議參考文件



WORLD FREE ZONES ORGANIZATION

MEMBERSHIP & SERVICES

Introduction

Launched on 19 May 2014, the World Free Zones Organization (World FZO) is a not-for-profit body that provides one authoritative and collective voice representing the interests of free zones around the globe.

Formed under the keen leadership of 14 founding members, the World FZO is the first organization to bring together free zones to promote the exchange of views, best practice, experience and knowledge and ensure the sustainability and ongoing success of the free zone model.

From the first free zone at Shannon Airport in 1959, the free zone concept has proliferated to the point where there are an estimated 3,500 free zones around the world.

To ensure that free zones have the greatest possible impact, they need a global, unifying association to bring them together. One that can represent their interests, share their achievements and support their continuous positive development. It is to address this need that the World FZO has been created.

OBJECTIVES

1. Bring together free zones; regional, national, subnational and local free zone associations; consultants and advisors to free zones; free zone users; interested governmental organizations; and international trade related organizations, for knowledge exchange, education and training, networking and business development
2. Provide a forum for free zones around the world to learn, grow and prosper through unrivalled access to exclusive in-depth research and insights
3. Gather, create, expand and disseminate the knowledge of, and about, free zones internationally
4. Improve the perception of free zones globally and position them as areas that make valuable contributions to the local economy and promote sustainable business
5. Create 'best in class' standards for free zones that enhance the economic ecosystem both globally and in local markets, as well as guidelines for the establishment and administration of free zones
6. Advocate before international organizations and governments on behalf of free zones and the collective interests of their members, and foster public awareness of free zones
7. Provide specialized operational, administrative, educational and networking services to Members, Partners and Observers through trainings as well as physical and electronic resource
8. Support and advise new free zones internationally as they develop
9. Become the global through leader on free zones and issues relating to them

+971 4 204 5473 membership@worldfzo.org www.worldfzo.org

Membership Services

The World FZO provides a number of dedicated services to its members and partners. These services have been designed to support members in achieving their strategic objectives and enhancing operational performance, as well as bringing new insights and learnings around best practices.

KNOWLEDGE

The World FZO has built the world's most comprehensive knowledge base on free zones to provide members and partners with key insights to inform economic and business strategies. This Knowledge Hub is research-led and aims to raise awareness of the positive contribution free zones are making to the global economy. The key elements of World FZO's Knowledge Hub include the World FZO Observatory, FZ-Pedia and the World FZO Open University.

NETWORK

A key objective of the World FZO is to become the leading platform for interaction between free zones and a facilitator for business development and new partnerships. In joining the World FZO, members will immediately gain access to a wide network of free zone professionals, consultants and international policy makers. The World FZO aims to connect all of these industry players through regular networking events, as well as a comprehensive online B2B networking portal, and Services Marketplace.

In addition, the World FZO hosts its Free Zone Outlook Annual International Conference and Exhibition, the largest gathering of free zone professionals and experts in the world.

SUPPORT

The World FZO provides a number of support services including the Future Ready Free Zones program, Certifications and awards, as well as Innovaton initiatives to empower and enhance their operational performance. These include internationally accredited certifications, free zone community development programs, as well as support and advice for achieving 'green status' and developing smart, digitally-integrated free zones.

Knowledge Services

WORLD FZO OBSERVATORY

A dedicated research center for World FZO members that collects and analyze original data on global free zones. The World FZO Observatory principally seeks to provide members with the necessary tools to engage and advocate with international policy makers. To this end, the Observatory publishes a monthly newsletter and quarterly Bulletin with trade, FDI and industry developments and statistics as they relate to free zones. The Observatory is also in the process of mapping out the world's free zones in an Atlas that will include comparative data on each.

Lasttly, the Observatory publishes an annual Free Zones Outlook Report, a forward looking report with expert insights on global free zone trends.

FZ-PEDIA

The FZ pedia is the World FZO's open resource for research, expert insight and analysis on free zones and special economic zones globally. This online library is available to members, associate members and partners and all content is peer-reviewed by the international academic and business community.

The World FZO continues to develop the FZ pedia and contributions are welcome and encouraged.

WORLD FZO OPEN UNIVERSITY

The World FZO's Open University is the center for research and executive education for free zones and ancillary industry professionals. In collaboration with the World FZO's key strategic partners, the Open University will deliver executive trainings based on best practices.

The World FZO Open University is your gateway to exclusive reports, case studies, tools kits, expert advice and online seminars.

Network Services

FZ B2B

Make new connections on the go, anywhere you go with the FZ B2B portal.

Designed to help you find and connect to new business partners from all over the world,FZ B2B lets you build and manage your profile, grow your network and maximize visibility, make powerful new connections and keep in touch with your Free Zone colleagues from across the globe.

Unlike other online networks, FZ B2B is a commercial tool. It connects companies to one another on a global scale, allowing members to target their audience and search for new business opportunities by region and sector, worldwide.

FZ MARKETPLACE

In the FZ Marketplace, you will find a variety of offers from associate members, showcasing some of the world's most powerful free-zone specific applications, products, solutions and services, all designed to help your free-zone thrive, globalize and maximize its potential.

FZ OUTLOOK EVENTS

From high caliber conferences and keynotes, to small group breakout sessions, business to business workshops, and a variety of other networking opportunities, World FZO's action packed events are guaranteed to keep you coming back for more.

Support Services

FUTURE READY FREE ZONES

From streamlined administration and next generation infrastructure, to best in class services and support resources for your community, the Future Ready Free Zones intitiative delivers a transformative framework that empowers zones to capitalize on emerging trends, adapt to the rapidly evolving global economic landscape, and position themesleves for success both now and in the future.

The Tech-Ready Zone program, which offers e-Governance services and smart zone capabilities that will enable members to validate their businesses and complete processes online without the need for physical documentation, in accordance with local requirements. Further the program will provide certification leading to Smart Zones.

The World FZO's flagship development program, makes use of preferred partners and resources, to provide unparalleled learning and development tools including tool kits, guidebooks, over 500 business learning videos and much more, all designed to ensure free zones have the knowledge, insight and skills they need to turn challenges into opportunities.

CERTIFICATIONS & AWARDS

Are you looking to benchmark your free zone and ensure that your efforts are being put in the areas of maximum impact?

The World FZO certification programs help free zones measure their progress and success in the areas of sustainability, security, environment, and regulations. Through our partnerships with multilateral organizations and leading international consulting firms, we can help guide your efforts and reward your achievements.

Certifications Offered: Smart Zone, Secure Zone, and Green Zone

INNOVATION

Given the strategic importance of free zones in global trade, they can play a vital role in the development of innovative fast growth businesses across the world.

These businesses could create jobs and expand economies. The World FZO can guide in the development of policies and programs that help spur innovation in your free zone and create the next business success stories.

Membership Benefits and Levels

World FZO members benefit from industry research, operational and administrative support services, high-level training, networking services and events.

Paid members will have access to online portals where the latest studies on free zones around the world are readily available, as well as monthly newsletters, and a regular bulletin tackling key industry opportunities and challenges.

World FZO's events provide members with high-level business development and strategic networking opportunities with peers, consultants, service-providers, policy makers, multi-lateral organizations and key business decision makers from around the world.

Members will also benefit from a number of support services and educational tools for free zones and companies registered within them, delivered through a range of workshops and online webinars throughout the year.

Membership to the World FZO is open to both individuals and entities (public or private) that prove interest in the promotion and development of free zones, in any country recognized as a UN member. There are three types of membership categories:

VOTING MEMBERS

Voting membership is open to recognized free zones and free zone associations who will have access to the full range of World FZO services. Voting members will also be afforded full voting rights, enabling them to contribute to decisions around Board Member appointments within the World FZO's General Assembly, which takes place on a yearly basis at the Annual Conference and Exhibition.

ASSOCIATE MEMBERS

Associate membership is open to individuals and entities working in the free zone environment, or in support of free zones internationally. Associate members will have access to the full range of membership services, however, they will not have voting rights in the General Assembly.

PARTNER & OBSERVER MEMBERS

Partner or observer memberships are open to government, quasi-government or non-government organizations involved in the area of international trade and customs, who will be individually invited to participate in the activities of the association by the Board of Directors. Partner & Observer members will have access to select World FZO Member Services

Membership Application

World FZO Membership Application Form

Please complete this application by filling all the fields below. Once complete, return your application to membership@worldfzo.org or by fax to +971 4 295 2945

1. Main Contact Information

Contact Name

Contact Email

Company Name

Role / Position

Mailing Address

Telephone

City

State / Province

Postal Code

Country

2. Package Selction

Membership Level

Voting ☐

Associate ☐

Partner ☐

3. Organization / Company Details

Full Legal Name of Organization

Year of Establishment

Number of Employees

How did you hear about the World FZO

4. Billing Information

Billing Contact Name

Billing Contact Email

Billing Contact Telephone

Billing Mailing Address

Signature / Company Stamp

Date

☐ I hereby agree that I have read, understood and agree to fully support and be bound by the Articles of Association and Policy of the World FZO and to be admitted as a member of the Organization.

☐ I also confirm that my organization/entity meets the requirements set out in the "Criteria of Admission."

Criteria for Admission

All Members

To be a member of the World FZO (either a Voting Member or an Associate Member), prospective members (the "Applicant") must confirm and undertake in writing that the Applicant:

- is a natural or a juristic person (as applicable);
- is in a good standing;
- is financially solvent;
- is committed to, or has its own objectives aligned with, the Policy Statement and objectives of the World FZO;
- is adherent to the standards of ethical conduct and social responsibility befitting the status and objects of the World FZO; and

Additional criteria to be a Voting Member

In addition to the criteria in section 1 above which apply to all prospective members of the World FZO, to be a voting member of the World FZO, Applicants must also confirm and undertake in writing that the Applicant:

- is recognized or registered (as applicable) as either a Free Zone or a Free Zone Authority by the relevant government authority within the jurisdiction(s) that the Applicant operates, and that jurisdiction(s) is in a country that is a member of the United Nations.

Additional criteria to be an Associate Member

In addition to the criteria in section 1 above which apply to all prospective members of the World FZO, to be an Associate member of the World FZO, Applicants must confirm and undertake in writing that the Applicant:

- is either carrying on business from (and registered as a member of) a Free Zone, or provides services to members of a Free Zone.

WORLD FREE ZONES
ORGANIZATION

+971 4 204 5473 membership@worldfzo.org www.worldfzo.org

WORLD FREE ZONES ORGANIZATION

WORLD FZO OBSERVATORY
RESEARCH PUBLICATION

RP 1 | MAY 2016 WWW.WORLDFZO.ORG

Next Practices, Beyond Best in Class Practices

Research Report on Free Zones around the World

By:

Ms. Amna Al Saleh, Senior Project Officer, World FZO
Dr. Mohan Guruswamy, Chief Knowledge Officer, World FZO
Dr. Samir Hamrouni, Chief Executive Officer, World FZO

The global socio-political and economic landscape is evolving constantly. With such evolution come challenges. By now it is well known that the policy context around the world is becoming increasingly complex. Countries face domestic political compulsions and simultaneously, have to meet international obligations.

The policymakers in most countries face a dilemma – how best to judiciously reconcile the apparent conflict between domestic socio-political compulsions and international obligations.

Free Zones around the world are not immune from the evolving global dynamics and policy imperatives. If anything, FZs have to anticipate what is in store for them in future and prepare for a 'state of readiness' to meet newer socio-political challenges as well as benefit from newer economic opportunities.

Therefore, it is time to look ahead, anticipate and prepare for the future. This research report titled Next Practices, Beyond Best in Class Practices, on FZ's around the World has been prepared by World FZO's Knowledge Management unit.

As part of the research work, in addition to in-house analysis, a series of interviews with domain experts and persons of influence in the field were conducted to elicit views about future growth trajectory of FZ and strategies to make FZs more relevant.

A semi-structured interview guideline was designed for this purpose highlighting the relevant areas associated with the future practices of FZ's. The questions primarily focused around factors influencing future growth trajectory of FZ's and approaches recommended by domain experts to address them. The questions revolved around Dynamics of global economic growth and its linkages to FZ growth, Scale Economies, Strategies to identify and address future expectations of customers, Convergence or Divergence of FZ practices in future, and Key drivers of competitive edge.

(Continued on page 2)

Is growth of FZ's linked to global economic growth?

The positive relationship between global economic growth and growth of FZs is well recognized. Admittedly, in the coming years, the world economy and the FZs will grow in tandem.

However, far from being uniform, the nature of FZ growth around the world is likely to be differentiated and varying. There will be regional differences in growth rates driven essentially by local conditions – regional growth dynamics, policy environment, incentive structure and so on.

Take Africa for instance. At present there are an estimated 700 FZs operating. The number is forecast to double to 1,500 in about five years. As the world talks about Africa as 'the next frontier' to conquer, the huge growth Africa is poised for is sure to trigger massive growth in Africa's FZs. This can potentially exert a cascading effect on the Continent's economy as well as provide spin-off benefits for the world.

Not only will there be regional differences, there will also be differences in the composition of goods and services basket. The proportion between trade in manufactured goods and trade in services is also likely to undergo changes.

Importantly, Services are set to gain. While the role of Services has always been critical, technology has made inroads into the so-called traditional Services sector. With the emergence of technology driven trade (say, Ecommerce), the Service sector is poised to gain increasing prominence.

FZs need to focus on effective use of modern technology, especially Information and Communication Technology (ICT), to meet the growing demand of fastidious consumers, shorten the supply chain and capture value through disintermediation and by bringing the suppliers and customers closer. In other words, FZ's need to equip themselves adequately to become Tech-Ready Zones.

Yet, the merchandise trade will still retain its importance. This is simply because, whether factories or people, consumers will continue to consume physical goods. So, trade in physical goods – whether raw material or intermediate products or finished goods – will very much be an integral part of business. Yet, one must add, given the evolving nature of consumer demand, trade in merchandise **will increasingly tend towards value-added goods or high value goods.**

Is Convergence for real?

ICT revolution has brought the world closer. Business houses today are 'virtually' closer than they have ever been before and geographically faster to access / reach. This proximity has meant there is so much for each other to learn from. Such learning process and resultant adoption of good practices has the potential to bring about a convergence of good business practices among FZs. These practices may cover laws, policy, governance, incentive and administration.

But is the trend visible on the ground? Yes, there is emerging evidence, incipient though at this stage, that business practices are beginning to converge, admittedly rather slowly. Networking among FZs is enabling this convergence, and the process is likely to gather pace in future. Indeed, if a set of 'Good Practices' indicating 'Dos and Don'ts' is evolved and adopted, the pace of convergence will accelerate.

Yet, one must hasten to add that such convergence is neither uniform nor universal. Convergence will depend to a large extent on the economic situation of the country of FZ location, its policies and legal framework. So, it is happening in some cases and in some others, not. The trend or the clarity of trend needs further evidence as we move into the future.

Small is beautiful. Or, is it?

The debate whether business organizations should be large or small is age old. Both have their merits and demerits. Small is manageable; small is efficient; small is in a position to withstand business cycles through quick adoption of innovative practices. But it is often argued that small may not enjoy scale economies and face greater risk of being crushed by daunting challenges. So, is large the answer? Large organizations with large productive capacities benefit from scale economies and often exert clout in the marketplace. So, should organizations grow to a size that makes them 'too big to fail'?

Clearly, 'one size fits all' approach to FZs is inadvisable and impractical both. While small units are generally believed to be more service-oriented given the direct connect with customers and vendors, the large ones with huge productive capacities are the ones that generate more jobs and thereby more incomes.

So, the classic question: Should there be many small FZs dotting the landscape or should there be a handful but really big FZs? Whether FZs should be small or big will be driven by several considerations including government policies, regulatory capacity, labor conditions, extent of technology adoption, financing options, logistics issues and so on. It is for the investors to take an informed decision about the size of FZs taking into account market size, product mix, level of investment, return on investment and more importantly, evolving business dynamics.

Going forward, both small and large units will co-exist. Cooperation among them will ensure both will thrive and prosper. Small units will have the opportunity to scale up.

Will FZs be bitten by the M&A bug?

The global trend in businesses across sectors is of Mergers and Acquisitions (M&As). The result is consolidation of capacities and technology transfer. Such inorganic growth is often driven by market-share maximization objective and occasionally for technology acquisition and so on. But by their very nature, M&As reduce the number of market participants and can potentially create market dominance by a handful. M&As can be local, national or cross-border. Will FZs be bitten by the M&A bug? Experts believe, if consolidation were to gather pace, it would be a welcome development. There is also reason to believe, private FZs will have a greater propensity to witness and indeed trigger M&As.

To accelerate the pace, it is necessary to launch an awareness campaign about the potential benefits. So, the M&A idea needs a push, some experts suggest.

At the same time, there are those who believe, cooperation rather than acquisition may be the way forward. They argue that cooperation will create conditions to deliver greatest good for the greatest number. Eventually, however, the fittest and the fastest (to adopt and adapt) will survive.

What are the Drivers of Competitive Edge?

It is often said that competitive edge is key to business success. In the event, FZs must acquire that competitive edge, to not only survive but also prosper. A majority of experts rate technology adoption as a critical driver of competitive edge, especially in delivery of services.

While technology adoption may be crucial for those who render leading edge services, location (say, near a port) and quick access to support services will help sharpen the competitive edge of those in goods trade, especially export-import trade. Additionally, at the micro level, strong product knowledge and market knowledge coupled with ability to foresee the emerging trends would foster increased competitiveness.

Are FZ's ready to meet future Customer expectations?

Because the idea of Free Zones is still evolving, most FZs attempt to understand the needs of their customers with a view to fulfilling the needs. Yet, customer expectations remain either unfilled or partially fulfilled; and often, expectations keep changing / evolving. These expectations will largely depend on the nature of business units that operate within the FZ and evolution of market conditions they are exposed to. Do FZs know what the future needs of customers will be and are FZs ready to meet the future needs of customers / FZ user companies?

Customer expectations in the future are likely to be wide and varied. There will continue to be expectation of better incentives, availability of workforce with requisite skill sets, economical and readily accessible logistics support.

Importantly, customers with progressive mindset, with keen desire to promote sustainability and evolved corporate social responsibility are more likely to demand 'Green and Smart Free Zones'. Heightened expectation of improving the 'Ease of Doing Business' is another customer-centric issue that deserves attention.

How important is Public Private Partnership (PPP)?

In addition to private sector invested and managed Free Zones and government-supported (often, funded) free zones, a partnership between the private sector and the public sector (read, government) in establishing FZs is often referred to as PPP model. Free Zones developed on the PPP model have attracted attention.

PPP model can take various forms including financial and resource involvement of government and creating a positive policy environment for the success of FZs while the private sector will bring in investment and technology. Opinion is of course divided on the desirability of PPP model. Because FZs are usually outside the ambit of various laws applicable to domestic tariff area, **it may be both desirable and necessary for the government to be a partner in FZ and ensure sustainability, safety and security of operations.**

Yet, there is a thin line of difference between monitoring and regulating. Somewhere along the line, there may be suspicion that monitoring can morph into regulation. It is important that monitoring by government should be non-intrusive and the process should be predictable. The government shall act as a facilitator rather than seek to control, for instance the movement of goods.

Conclusion: Very clearly, the idea of FZs is still evolving even while the global marketplace is undergoing constant changes. Free Zone promoters have to keep a constant tab of the evolving situation and as much as possible be proactive in gearing to meet the emerging needs. It may call for building multiple scenarios for the future. Technology is sure to play an increasingly vital role in every aspect of human endeavor and those associated with FZ in whatever manner must recognize and exploit it.

Summing up, with clear evidence of constant evolution of global socio-political and economic landscape, FZ's need to anticipate emerging trends and prepare themselves to adopt as well as adapt and get ready for a paradigm shift. Specifically, the focus of FZ's in future has to be on the following:

1. Technology adoption by becoming Tech-Ready zones
2. Anticipate future customer expectations and tailor-make services proactively
3. Develop Eco-friendly Green Zones
4. Ensure safe and secure operations leading to sustainable zones
5. Look beyond competition and develop cooperative mechanisms for mutual benefit of zones
6. Fostering a synergistic partnership between public and private sectors
7. Encourage Innovation and develop requisite competencies amongst human resources

In order to address the focus areas, there is a strong need to design and implement a comprehensive global program which will enable the FZ's across the world in gearing towards meeting the emerging needs.

Acknowledgement:

The following domain experts were interviewed for the purpose of this research and they made valuable contribution by sharing their knowledge-base:

Isidoro Hodara - Vice President of Zona America, Uruguay

Martin Ibarra - Honorary President and Founder of Americas Free Zone Association, Colombia

Lewis Leibowitz - The Law Office of Lewis Leibowitz, USA

Edvar Mum - General Manager of Mersin Free Zone Operator, Turkey

Daniel Griswold - President of National Association of Foreign-Trade Zones, USA

Mehdi Tazi - Managing Director of Tangier Free Zone, Morocco

Nasser Al Madani - Assistant Director General of Dubai Airport Free Zone Authority, UAE

Chris Ndibe - Executive Secretary of Africa Free Zone Association, Nigeria

Dr. Mohammed Alzarooni - Chairman of World FZO, UAE

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RP 2 | MAY 2016 WWW.WORLDFZO.ORG

Role of Free Zones in Facilitating Global Supply Chains

Opportunities and Challenges

By:

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Mr. Laurens van der Schoor, Free Zones & Incentive Advisor, Investment Consulting Associates (ICA)

With elevated levels of globalization and increasing integration of national markets with global markets, global supply chains (GSC) have become a matter of reality in recent years. Global production networks especially of multinational enterprises (MNE's) are a case in point.

Each one of the broad activities namely raw material production, processing, assembly and consumption can potentially take place in different countries located in geographically disparate regions; and yet, help maximize stakeholder value across the chain. Such maximization calls for a certain symphony and synthesis, not only of ideas but also of economic activities among stakeholders. In other words, there has to be an orchestrated endeavor to work in tandem or in lockstep.

In many sectors, logistics costs are nowadays higher than the costs to actually manufacture products and goods. (1)

As such, a special emphasis is put on optimizing supply chains through intensive supply chain management and selecting investment locations that offer a competitive environment to (further) develop and support a firm's GSC and logistics.

Corporate investors appreciate locations which offer such competitive locational advantages consisting of a mix of high-quality and reliable infrastructure, utilities and multi-modal logistics ensuring a rapid transfer of goods and products complemented with market access to inputs, suppliers, intermediaries, vendors, customers and consumers and economies of scale.

Free Zones (FZ's) have the potential to anticipate on these needs by catering to the specific supply chain requirements of corporate investors to facilitate efficient movement of goods and products. In essence, Free Zones could reduce operational costs for companies, both in terms of manufacturing and logistics because it reduces time and costs related to the transfer of goods and products.

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The competitiveness of Free Zones for GSCs, amongst others, revolves around:

- The presence of a dedicated on-site customs inspection post and professional customs officers that enables companies to import and export cargo 24/7;
- Elimination, reduction or deferral of duties and taxes making importing, storing, processing, manufacturing, handling and (re-)exporting goods more cost-effective and may contribute to improved cash-flows;
- In order to apply for the lowest possible duty or freight rate, goods may be processed or manipulated to change the final product's shape and weight; (2)
- Simplified and streamlined administrative as well as privileged and expedited customs procedures, reducing the bureaucratic burden and paperwork (e.g. document requirements for importing and exporting);
- Assuming storage in EZs is allowed for unlimited periods to avoid pressure to move goods and pressure on infrastructure offers zone-based companies considerable flexibility in delivery dates, encourages them to search for the best market opportunities or store goods in excess of the host country's import quotas; and
- Full access to and utilization of stored goods at any time, allowing, for instance, the use of stored goods for collateral and using the warehouse as a showroom.

Many "modern generation" models of FZ's have recognized this trend towards competitive platforms for logistics and GSCs. For instance, the exemption from duties and taxes has been extended from just imported inputs to all merchandise entering a Free Zone. Free Zones anticipate on industries in which they possess comparative advantages by taking a cluster-approach. Industrial comparative advantages include industries in which the Free Zone region has specialized and/or built up production capacity. Linking the local specialized suppliers and vendors of a particular industry with zone-based companies operating in the same industry may create strong and cost-effective local supply relationships, contributing to the overall effectiveness of a MNE's GSC. In addition, many "modern generation" models of Free Zone have relaxed stringent export-performance requirements, also to conform with requirements set out by the World Trade Organization on subsidizing export, leading to a better integration of Free Zones into GSCs.

Without doubt, FZs have been a part of economic activity worldwide in recent decades. The role of FZs in facilitating GSCs has been on top of every researcher's mind for some time now. The nexus between FZs and GSCs is an area of interesting study. The functional relationship between the two has often been an a priori assumption.

In a preliminary exploration of the seemingly functional relationship between FZs and GSCs, the Knowledge Management Unit of World Free Zone Organization (World FZO) set-off a dialogue with experts in the domain including academicians and business practitioners, in addition to conducting in-house research.

The principal objective of the study was to enquire how FZ's are positioned within GSCs as also to bring out the most critical challenges FZ's may face in future as well as opportunities that may emerge for strengthening their position within the global supply chain.

This research primarily aims to explore experiences of how FZ's facilitate Global Supply Chains (GSC) in practice. A semi-structured questionnaire was designed to interview eminent domain experts, including academics and business practitioners active in the field of GSCs to include their view on FZ's, how they are positioned within GSCs and the most critical challenges and opportunities future FZ's may face when maintaining or strengthening their position.

The objectives of this study are to collect the views of domain experts on the role of FZ's (past, now and future expectations) within GSC and compile a research study with a practical perspective (i.e. from the field) on the role FZ's play in facilitating GSCs.

The questions to domain experts included, historical development of GSC's over last few decades along with trends witnessed; motives and drivers behind GSC's; challenges faced and overcome; The role and contribution of FZ's in development of GSC's; Regional and industry differences; future expectations of GSCs and how can these be facilitated by FZ's?

Summary of Interviews with Experts and In-house Research:

While the concept of global value chain (GVC) is not new (Japan having outsourced to Thailand as far back as in 1985), over the past decade in particular, enhanced level of trade liberalization and globalization policies pursued by many countries has triggered demonstrable evolution of global supply chains.

Given that trade between nations in the form of import and export activities has been going on for centuries, global commodity chains have been in existence for long. At the same time, economic clusters – specializing in production and supply of location-specific and craft-specific goods – emerged to meet the growing demands of fastidious consumers.

Over time, the commodity supply chains and economic clusters integrated to form what has come to be known as Global Supply Chain.

Earlier, only non-core activities were outsourced; but currently, given the challenges arising out of intense competition, value capture and customer satisfaction even core activities are outsourced. Hypothetically, four different parts of say a machine may be made in four different countries, assembled in a fifth country and marketed in all the five plus sixth and many more.

What triggered the evolution of GSC? There is near-unanimity among experts that several considerations have combined to be the basis of formation and gradual progress of GSC. These include the ongoing imperative of continually optimizing the business operations, improving the bottom line, constantly seeking to enhance shareholder value, cost reduction, profit maximization, technological advances as well as government policies and financial considerations.

More often than not, most value chains are regional in nature rather than substantially global. This is often caused by proliferation of regional trade agreements and advantages of geographic proximity in addition to other factors.

While GSC is a reality, where is the role of FZ's in this set-up? Clearly, FZ's are central to the GSC paradigm. Cost considerations, supply chain efficiencies and easier access have been some of the key considerations that have played a key role in making FZ's an integral part of GSC.

FZ's connect the stakeholders in the supply chain more directly because of the free-trade policy environment that makes access to goods and services a lot easier. Indeed, FZ's create space for the robust growth of GSC and Global Production Network. This is seen to be especially important in the manufacturing sector as well as knowledge-intensive or research-driven sectors. Science Parks are a good example.

There is growing realization, as experts assert, that the role of FZ's is more important for developing countries as they help enhance economic value.

The nature of the industrial or economic activity does influence participation in the GSC. Firms using proprietary information are prone to outsource less. On the other hand, manufacturers of strategic goods or hazardous goods, for instance, will surely evaluate whether to set up the business in domestic tariff area or free zone. Handling of dry bulk cargoes and liquid bulk cargoes demand specific logistics solutions. So, what value proposition FZ's offer for such businesses will be a key factor to influence the choice of location.

But what clearly comes out of the research is the near unanimous view of experts that FZ's should develop uniform standards and contribute to **sustainable** supply chains.

While examining the role FZ's play in the development of GSC, regional specificity or regional differences can be observed rather clearly. The contrast is stark, for instance, between North America and Asia. While a significant part of what is produced in North America is for local consumption, Asian manufacturing under the lead of China caters to the global market. Competitive labor cost is of course a key consideration for enhanced economic activity in Asia.

Although FZ's have been expanding in number and scale, currently, there are challenges faced by them. These include how to make FZ's more cost efficient and energy efficient; how best to ensure sustainable practices; how to enhance CSR; meeting the adverse consequences of climate change; and last but not the least, technological advances like for instance 3D printing.

In this context, World FZO has an initiative called Free Zone of the Future Program (FZF) which aims to prepare FZ's through capability building, leading to a sustainable and prosperous future. FZF Program will aim to consolidate all the support services in to a global development framework, which will be useful to not only empower FZ's to enhance their business growth, but also to policy makers, thought leaders, investors and financiers.

Not only would FZ's have to overcome current challenges, there are others lurking on the horizon. Future challenges may come in the form of fiscal as well as regulatory or compliance issues, as well as protectionism or security related issues.

Acknowledgement:

The following domain experts were interviewed for the purpose of this research and they made valuable contribution by sharing their knowledge-base:

Gary Gereffi, Professor of Sociology and Founding Director of the Center on Globalization, Governance & Competitiveness, Duke University, USA

Henry Yeung, Professor of Economic Geography, National University of Singapore, Singapore

Hubert Escaith, Chief Statistician, World Trade Organization, Switzerland

Patrick Low, Visiting Professor at Hong Kong University and Fellow of the Asia Global Institute, Hong Kong

Przemyslaw Kowalski, Senior Trade Economist, Organization for Economic Cooperation and Development, France

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RP 3 | MAY 2016 WWW.WORLDFZO.ORG

Incentives Awarded across Free Zones:

Confirming the Transition to "Free Zones of the Future?"

By:

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Dr. Mohan Guruswamy, Chief Knowledge Officer, World FZO

Over the last decades, Free Zones have taken on a wide variety of names, concepts and designs, ranging from the more "traditional" models of Export Processing Zones (EPZs) and Free Trade Zones (FTZs) to "new generation" models such as diversified Special Economic Zones (SEZs) and cluster-based Specialized Zones (SZs). The common denominator among all of these Free Zone concepts, however, is that companies investing and locating in Free Zones enjoy a privileged status in terms of customs practices and regulations. Zone-based companies are typically exempted from import and export duties, value-added tax (VAT) and other (local) taxes which, in combination with simplified and streamlined customs and administrative practices, considerably reduce their operating costs.

In addition to this preferential treatment, zone-based companies often are eligible to take advantage of other fiscal and financial benefits that may be awarded in the form of incentive packages. Incentives provided to companies in Free Zones may have different objectives. Traditionally, incentives have been awarded as generous full or partial exemptions on corporate income and profit taxes (i.e. tax holidays) to directly increase the net profit of export-orientated companies. More recent, incentives seek to compensate for particular weaknesses of the Free Zone's competitiveness (e.g. grants to train and educate the local workforce), reduce operating and investment expenditures (e.g. business support and cash grants to offset capital expenditures for materials and equipment) or mitigate the regulatory burden (e.g. exemption from national or sub-national rules and regulation).

A number of observations with regards to incentive packages awarded within Free Zones can be made according to a number of international studies on Free Zones (e.g. World Bank, Facility for Investment Climate Advisory Services and the Organization for Economic Cooperation and Development). Firstly, Free Zones, especially in developing and emerging countries, seem to be biased towards providing fiscal incentives, particularly tax holidays, complemented with import duty exemptions, exemption from local taxes, unlimited repatriation of profits and capital as well as personal income tax exemptions. From a political perspective, it is more tempting to provide fiscal incentives as opposed to other forms of incentives such as cash grants, credits and funds as fiscal incentives do not directly require spending tax-payers' money but rather result in opportunity costs in the form of revenue foregone.

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Secondly, it is claimed the scope of incentive packages provided by Free Zones has become increasingly similar and standardized across the globe. This has been spurred by two recent developments. The implementation of the World Trade Organization's (WTO) Agreement on Subsidies and Countervailing Measures (SCM), which has been designed to phase out incentives on export performance and the use of local contents, restricts the provision of classical fiscal incentives contingent on export requirements. In addition, the proliferation of regional trade agreements (RTAs) and, subsequently, the formation of regional trade blocks have limited the scope of incentives as a national policy instrument. Regulations and clauses on the provision of (future) incentive packages for Free Zones may increasingly become incorporated within RTAs resulting in regionally harmonized and uniformed incentive practices that potentially affect Free Zones. Also, the further intensification of RTAs and the implementation of the WTO's SCM have led Free Zones with fewer options to differentiate their incentive packages, which may lead to an increased commonality of Free Zone incentive packages.

However, this shift of Free Zone incentives policies away from the classical fiscal incentives reflects a larger trend where "traditional" Free Zone concepts evolve into more "new generation" concepts (e.g. SEZs and SZs). It is often claimed the more "traditional" Free Zone models primarily focus on attracting new greenfield investment undertaken by foreign export-orientated companies engaged in labor-intensive manufacturing, warehousing and logistics through awarding fiscal incentives to support capital investment. "New generation" Free Zones, on the contrary, typically target a wider variety of industries with special attention for high-end and high value-adding sectors (e.g. R&D, headquarters). Such zones rather provide non-fiscal incentives aimed at, for instance, improving the local labor force through skills and human resource development. Also, these "new generation" Free Zones do not discriminate between foreign and domestic investors and extend their incentives and services package to existing investors rather than a focus exclusively on new investors.

This research paper seeks to identify whether incentive packages that have been awarded to zone-based companies reflect this move to "new generation" concepts of Free Zones and whether Free Zone incentives have indeed become similar and uniform. Identifying trends concerning the recipients of Free Zone incentives (e.g. industry, sector, foreign or domestic, greenfield or expansion) helps to explore what type of investors Free Zones currently desire and target, which may or may not be in line with the "new generation" concept of Free Zones. Of course, such targets may vary considerably across countries and even across Free Zones within a country so caution is required when generalizing cross-country data. However, data on Free Zone incentives is scarce and this research study rather functions as point of departure as it explores unique Free Zone incentives data.

Data on investment incentives which have been exclusively awarded to companies locating in Free Zones has been retrieved from the IncentivesMonitor.com database. This data functions as ideal proxy for exploring how and to whom incentives have been awarded by Free Zone authorities and/or (local) governments as it captures both quantitative indicators (e.g. number of jobs created and value of capital investment invested by the incentive recipient) as well as qualitative characteristics (e.g. nationality and industry of the incentive recipient). Based on the IncentivesMonitor.com data, a sample of 966 awarded Free Zone incentives has been constructed.

Trends of Free Zone Incentives

These 966 incentives have been awarded across 24 countries from January 2010 up to and including March 2016. As the table below shows, a total of US$421.2 million has been spent by governments and Free Zone authorities on incentive packages awarded to zone-based companies. This implies an average value of US$0.95 million per incentive package. In turn, companies in Free Zones that received these incentives invested for a total value of US$22.79 billion, thereby creating over 204,000 new jobs. As such, an average Free Zone investment project that received incentives equaled a value of US$26.6 million and created 212 new jobs.

Over 2015, the database recorded 118 incentives that had been awarded in Free Zones, which, together with 2011, is the lowest annual number so far. Despite this low number, the average value of incentive packages has not decreased. On the contrary, with an average value of US$1.57 million and US$1.89 million in 2015 and 2014, respectively, incentive packages remain relatively generous. Thus, governments and authorities award fewer incentive packages but spent more money on these incentive packages. This may be a reflection of the fact that governments and authorities are more selective in awarding (larger) incentive packages due to budgetary and strategic reasons.

Table 1: Overview of key Free Zone incentive statistics

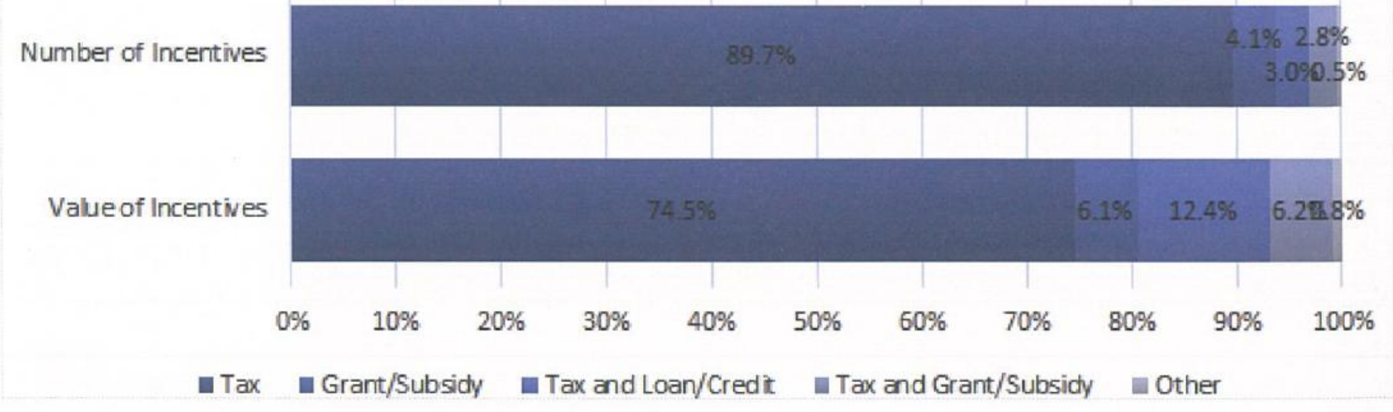
Year	Number of Awarded Incentives	Value of Awarded Incentives (US$ mln.)		Value of Capital Investment (US$ mln.)		Number of Newly Created Jobs	
		Total	Average	Total	Average	Total	Average
2010	146	$130.9	$1.03	$2,708.0	$22.0	17,890	123
2011	115	$73.0	$1.55	$1,649.2	$16.7	41,053	357
2012	215	$49.1	$0.41	$4,051.7	$22.0	34,421	160
2013	185	$90.7	$0.93	$4,276.9	$24.9	45,391	245
2014	144	$62.4	$1.89	$2,696.4	$19.7	23,993	167
2015	118	$11.0	$1.57	$6,961.1	$62.2	29,308	248
2016	43	$3.9	$3.06	$449.4	$14.5	12,360	287
Total	966	$421.2	$0.95	$22,792.7	$26.6	204,416	212

Source: IncentivesMonitor.com (2016) Date range: 2010-2016

Type of Free Zone Incentives

As mentioned, international studies highlighted the reliance of Free Zones on fiscal incentives, particularly tax holidays. Indeed, across the sample of 966 incentives, the vast majority continues to take the form of tax incentives. Nearly 90% of the incentives has exclusively been awarded in the form of a tax incentive. However, in terms of the budget spent on incentives, disproportionately more money has been spent on an incentive package consisting of a combination of tax advantages and a loan or credit (i.e. 12.4% of the total budget spent on incentives against just 3.0% on the total number of incentives).

Figure 1: Distribution of total number of incentives and total value of incentives per type of incentive



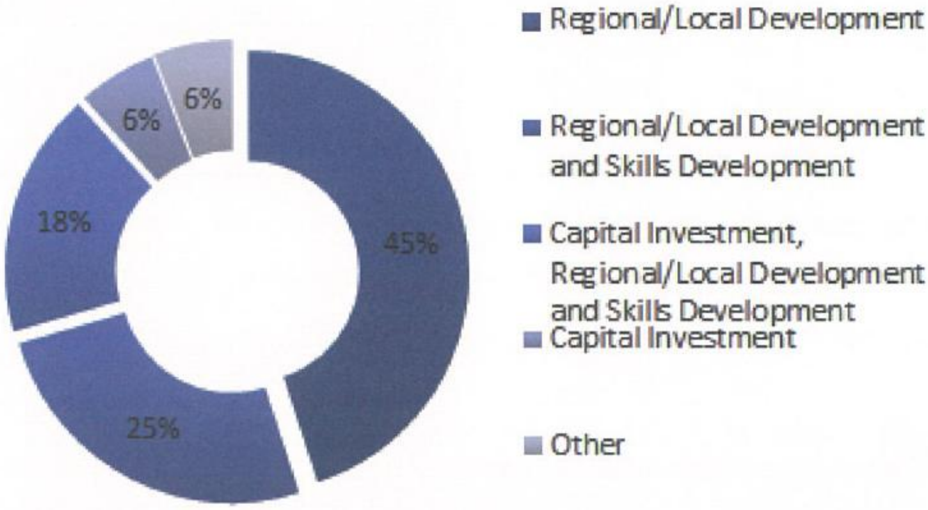
Source: IncentivesMonitor.com (2016) Date range: 2010-2016

Objective of Free Zone Incentives

Governments, authorities and policy-makers implementing Free Zones may have various motives for doing so. Frequently, "traditional" Free Zones are developed primarily to create static, short-term economic gains such as increased investment, employment opportunities, exports, foreign exchange earnings and tax revenues. On the other hand, the "new generation" Free Zones may have been initiated within a more dynamic and long-term strategic framework. In such cases, Free Zones may function as laboratories for testing and introducing new policies to contribute to economic diversification, structural transformation, sectoral upgrading, enhanced competitiveness and skills development.

Incentives granted to companies investing in Free Zones are usually aligned with such policy objectives in order to realize economic gains. It appears nearly half of all Free Zone incentives (or 45%) have been granted in order to create regional and local development by means of supporting investment attraction and employment generation. This thus reflects a focus on short-term economic gains typical for "traditional" Free Zones rather than dynamic and long-term economic gains. On the contrary, only 1% of Free Zone incentives is specifically aimed at supporting local labor force development through employment and human resource support, which rather is an indicator of the "new generation" of Free Zones. One out of four Free Zone incentives have been awarded to contribute both to regional and local development as well as to development of the local labor force whilst 18% of Free Zone incentives has been awarded to support multiple objectives (i.e. regional and local development, capital investment attraction and local labor force development).

Figure 2: Distribution of incentives per objective



Source: IncentivesMonitor.com (2016) Date range: 2010-2016

This implies Free Zone incentives have been initiated from a more or less short-term vision, geared towards contributing to attracting capital investment and generating employment opportunities, rather than from a long-term strategy contributing to economic diversification and transformation through the development of the local labor force.

Target of Incentive Packages

It may be the case various types of incentive packages are awarded to various types of investors in terms of their nationality, type of investment project (e.g. new or expansion investment) and industry and sector in which they operate. If Free Zones have indeed transitioned towards "new generation" concepts, their incentive packages should have been awarded to a wider variety of industries and sectors with special attention for high-end and high value-adding sectors (e.g. R&D, headquarters), both foreign and domestic investors as well as expansion and new investments rather than the narrow focus of "traditional" Free Zones and their incentive packages.

Target Sector
In terms of the sector, manufacturing remains the most popular target sector by far. Over half of the Free Zone incentives (57.3%) has been awarded to companies undertaking manufacturing activities, followed by companies investing in construction (14.0%), business services (12.5%) and warehousing and distribution (6.2%). Target sectors typical for "new generation" Free Zones have been awarded with incentives only sporadically, as R&D and headquarter investments only represented 2.5% and 1.3%, respectively, of all awarded incentives.

Target Industry
The bias towards manufacturing is reflected by the target industries. Consumer goods (20.7%) is the most frequently targeted sector, followed by services (14.4%), industrial goods (11.8%), life sciences (8.0%) and food & drink and basic materials (both 8.0%). These industries are typical labor-intensive industries that are compatible with the manufacturing focus of "traditional" Free Zones. Notable exceptions include services and life sciences, which adhere more towards the sectoral focus of the "new generation" Free Zones.

Investors' Nationality
The distribution of incentives regarding nationality of investor is, quite surprisingly, favored towards domestic firms. Two out of three Free Zone incentives have been awarded to domestic investors, leaving a third of incentives granted to foreign investors. Therefore, it seems the traditional bias towards foreign investors and FDI has been partially overcome. However, it should be noted a large number of incentives has been awarded in US Free Zones to US companies. If these are omitted, the distribution between domestic and foreign companies is more balanced (52.0% against 48.0%, respectively).

Type of Investment Project
Finally, looking at the type of investment project that has been rewarded with incentives reveals a distribution similar to that of the investors' nationality. One out of three incentives has been granted to existing zone-based companies that are investing in an expansion project against two out of three incentives which have been awarded to companies undertaking a new greenfield investment.

Conclusions

The aim of this research paper was to identify whether incentive packages that have been awarded to zone-based companies reflect the observed move to "new generation" concepts of Free Zones. Typical for this concept is a wider industry and sector focus as opposed to the previous narrow focus on export-orientated manufacturing, whilst it also aims to attract both foreign and domestic investment through the provision of non-tax incentives. If indeed Free Zones have moved towards this "new generation" concept, their incentive practices should reflect these traits.

The dataset used in this study to investigate Free Zone incentive practices indicates that – as opposed to the "new generation" concept of Free Zones - the vast majority of the incentives awarded within Free Zones remain to take the form of fiscal incentives and target new greenfield investment in manufacturing operations.

Incentives within Free Zones have been awarded with the objective to achieve short-term economic gains (i.e. contributing to attracting capital investment and generating employment opportunities) rather than contributing to long-term economic diversification and transformation (i.e. development of the local labor force), which is more the objective of "new generation" Free Zones.

On the contrary, there is some preliminary evidence that supports the shift towards the "new generation" Free Zones. For instance, the distribution of incentives awarded to domestic and foreign investors is more or less balanced, coming from an exclusive focus on foreign investors in "traditional" Free Zones.

Also, as the number of incentives that has been awarded has gone down but the budget spent on incentives has gone up, it appears governments and authorities are more selective but simultaneously more generous when it comes to awarding incentive packages.

The data presented should be interpreted carefully due to its limitations and it should be highlighted this research paper functions as a starting point. Nevertheless, based on a global sample of Free Zone incentives, it does provide some empirical evidence that the transition of Free Zones from "traditional" concepts to "new generation" concepts is far from complete. The beneficiaries of incentives do not reflect the target companies typical for "new generation" Free Zones. Repeating and extending this research on a periodical basis may function as a monitor of the progress of the transition and whether Free Zones indeed move away from their "traditional" concepts, strategies and lay-outs.

Footnotes

[1] This database tracks information on all major types of financial and fiscal incentives awarded to corporate investors establishing new operations or expanding an existing operation in all industries. Minimum requirements for incentive packages to be incorporated in the database involve job creation and a minimum amount of capital investment.

[2]Australia, Brazil, Cambodia, Colombia, Costa Rica, Cuba, Dominican Republic, India, Indonesia, Jamaica, Macedonia, Moldova, Morocco, Myanmar, Nicaragua, Panama, Paraguay, Poland, Russia, South Korea, Tanzania, United Arab Emirates, United States and Uzbekistan.

[3]Based on 445 awarded incentives out of the 966 awarded incentives as the incentive value has been disclosed and registered for 445 out of the 966 awarded incentives.

[4]Based on 858 awarded incentives out of the 966 awarded incentives as the capital investment value has been disclosed and registered for 858 out of the 966 awarded incentives

[5]Based on 445 awarded incentives out of the 966 awarded incentives as the incentive value has been disclosed and registered for 445 out of the 966 awarded incentives

[6]Average of 12 awarded incentives only

[7]Average of 31 awarded incentives only

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GREEN FREE ZONE CERTIFICATION PROGRAMME

SELF ASSESSMENT TOOL
STAKEHOLDER WORKSHOP

May 8th 2016

DUBAI CARBON AT A GLANCE

The Timing & Nature of the Business Have Been Key to it' s Rapid Success

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Who are we?

Dubai Carbon was established on 18th January 2011, by an agreement between the Dubai Supreme Council of Energy (DSCE) and the United Nations Development Programme (UNDP), in the presence of HH Sheikh Mohammed bin Rashid Al Maktoum, Vice President & Prime Minister of the UAE & Ruler of Dubai, and HH Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum, Crown Prince of Dubai, and UN Secretary General Ban Ki Moon.

Together with the UNDP, Dubai Carbon forms a Public Private Partnership (PPP). We are headquartered in Dubai, UAE, but we are growing regionally throughout the GCC countries. Dubai Carbon today acts as a Dubai level and UAE level focal point to capture, streamline, analyse and harmonise GHG data which is then utilised by the public & private sector to develop country level negotiations

What do we do?

Dubai Carbon's philosophy & approach to projects is in a manner that considers the financial outcome as much as the environmental impact, as all investment in green technologies must be economically viable. From this perspective we do not differ from any other management consultancy, however we do aim to maximise the return of investment in the field of environmental upgrade.

We undertake consultancy & project management on the basis of our extensive local knowledge & expertise, and the advantage of drawing on the international experience of our entire team. Our offerings are sustainability, energy & carbon solutions that promote economic viability whilst pursuing socio-environmental development.

OUR ACTIVITIES

	Type of Activities
Carbon Abatement & Resource Efficiency Strategies	• Carbon Abatement Strategy • Emission Reduction Programs • Carbon Footprinting
Research & Knowledge Development	• Sustainability Reporting • UAE State of Energy Report • State of Green Economy Report • State of Sustainability: UAE • State of Sustainability: ME
Multi-Stakeholder Think Tanks	• Carbon Ambassadors Programme • Dubai Green Economy Partnership • Green Jobs Programme • Green Deal
Manufacturing of Carbon Credits	• Programme of Activities • Clean Development Mechanism • Gold Standard
Green Project Management	• The UAE GHG Inventory

Below are a number of our clients that we have worked with over the years:

INTRODUCTION

The Free Zone of the Future Program

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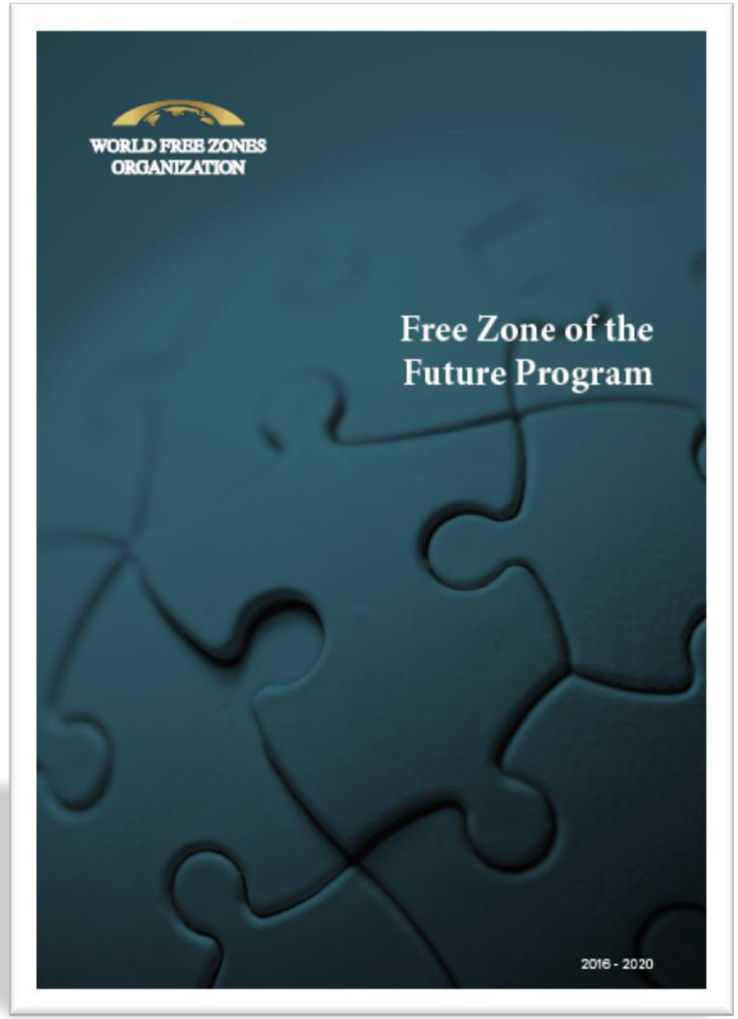
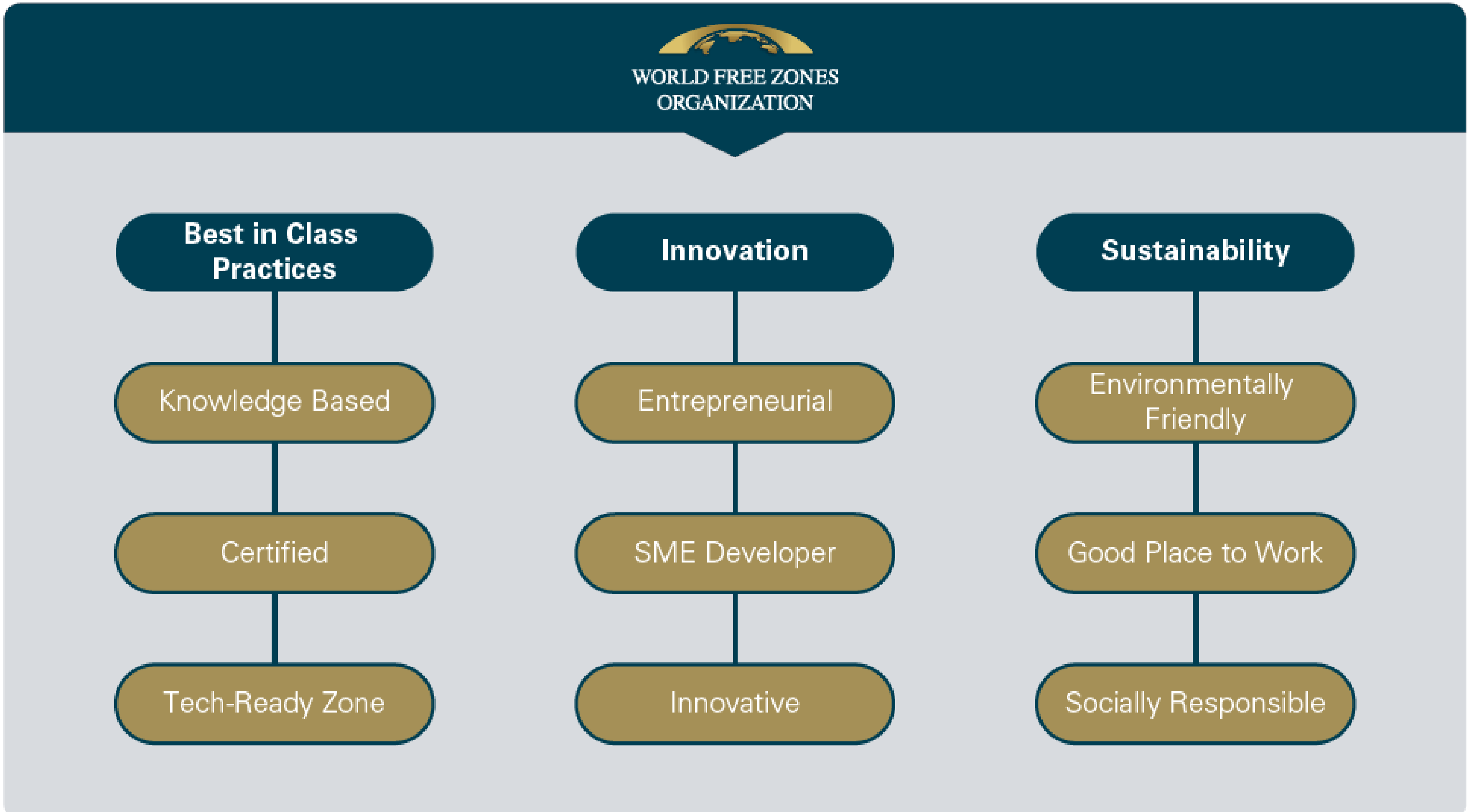
The World Free Zones Organization is launching **The Free Zone of the Future Program** (“FZF Program”) – a Global Initiative for Local Prosperity - that seeks to empower free zones and assist them to build and contribute to a sustainable and prosperous future – one that supports the growth of local economies and communities while simultaneously benefiting from the global market dynamics.

Dr Samir Hamrouni, CEO, WFZO



FREE ZONE OF THE FUTURE PILLARS

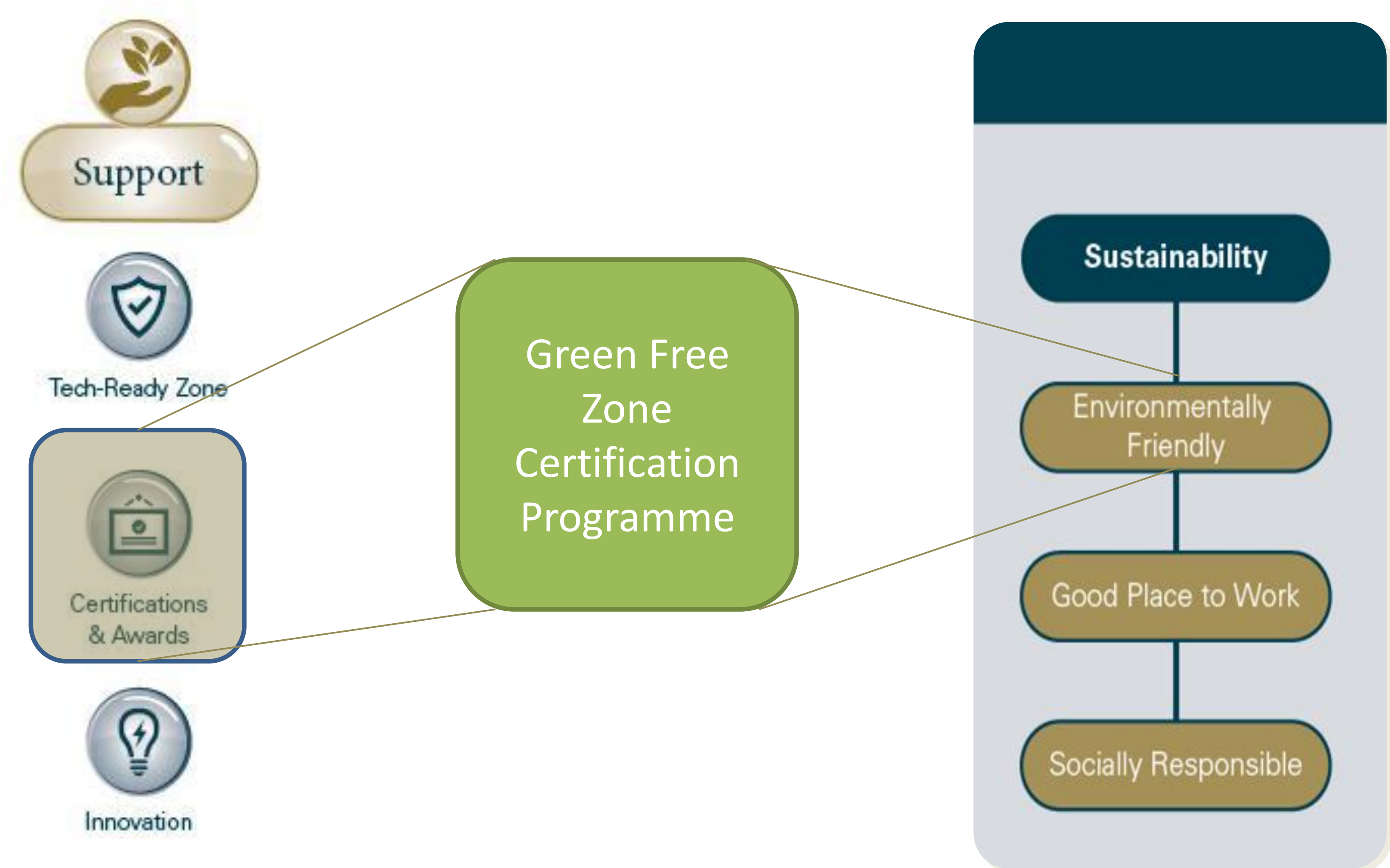
The Program Consists of Three Main Pillars of Excellence & Nine Components



Source: Free Zone of the Future Programme, WFZO (2016-2020)

ENGAGING FREE ZONES

Developing a Programme to Formally Appreciate the Greening of Free Zones Worldwide



GREEN FREE ZONE CERTIFICATION PROGRAMME

Multiple Tiers across Multiple Categories of the Green Economy

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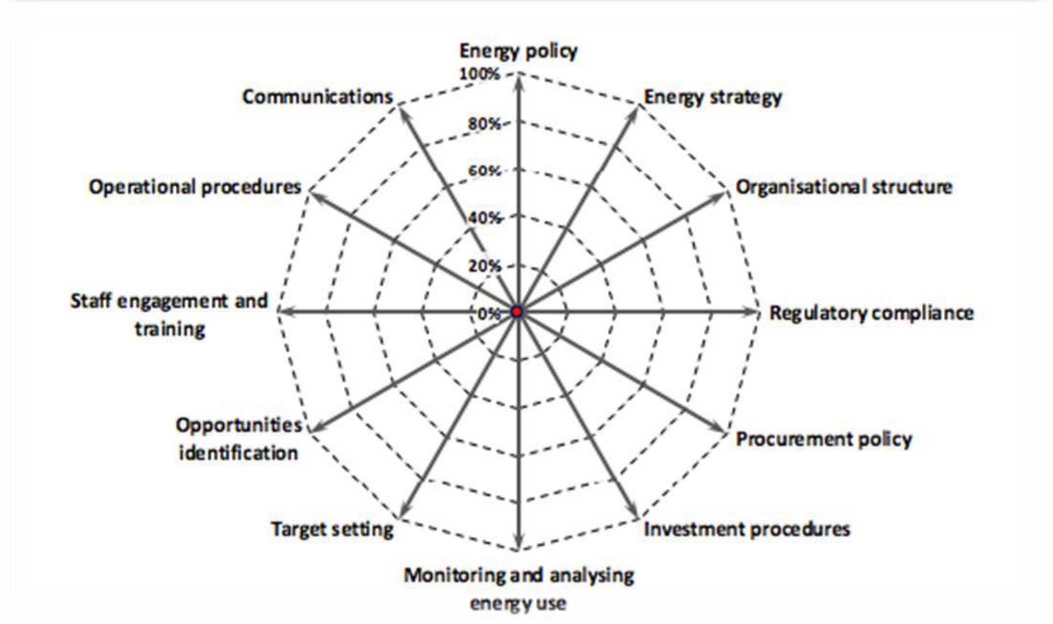
- World Free Zones Organization in collaboration with Dubai Carbon intends to introduce the Green Free Zone Certification Programme
- The Programme entails certifying free zones on their efforts towards becoming environmentally friendly
- The programme would include multiple tiers of certifications ranging from meeting requirements to pioneering free zones
- It all begins with a self-assessment tool

SELF ASSESSMENT TOOL

Web-Based Multi-Category Assessment Tool



- Self-Assessment tool for Free Zones including a back-end multi-criteria decision analysis tool
- Free Zones can use this tool on the WFZO website to assess their maturity in the certification scheme
- The assessment will be based on different categories of the green economy

THE STAKEHOLDER CONSULTATION

The Role of the Stakeholders in the Interactive Workshop is to provide Region-Specific Insight on Significance of Categories

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- Categories are topics which are highly relevant in the global green economy
- Each category is further sub-divided into sub-categories
- The objective of this workshop is to rank the categories & sub-categories according to global significance
- Workshop utilizes the international platform to receive stakeholder consultation gathering region-specific interests

CATEGORIES

Categories are Topics which are Highly Relevant in the Global Green Economy

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GREEN COMMUNITIES
Consulting stakeholders in decision making and accountability and promoting productive employment through continued learning opportunities for all

DESIGN & BUILD
Project delivery system where one entity works with the project owner to provide design and construction services specific to their requirements

ENERGY
Energy consumption , production, distribution, and utlisation in industries, processes and facilities

TRANSPORT
The transportation network infrastructure, vehicles and fuels used within the boundaries of the Free Zone and connecting it to the public transportation network

NATURAL RESOURCES
The supply chain , consumption, and end-use of natural resources in industries, processes and facilities

WATER
Water processing, consumption, and end-use in industries, processes and facilities

GREEN OPERATIONS
The steps for the Free Zone and its member companies to take to execute projects and processes in accordance with best practices

GREEN COMMUNITIES

Consulting stakeholders in decision making for accountability and promoting productive employment through continued learning opportunities for all

Training & Knowledge Sharing

Knowledge sharing and capacity building through continued learning opportunities

Raising Awareness

Targeting areas of green economy and sustainability through awareness campaigns for the members and the public

Green Jobs

Green jobs are decent jobs that contribute to preserve or restore the environment, be they in traditional sectors, or in new, emerging green sectors

External Engagement

Involvement and consultation of stakeholders who may be affected by the decisions it makes or can influence the implementatio

You decide!

DESIGN & BUILD

Project Delivery System where One Entity Works with the Project Owner to Provide Design and Construction Services Specific to Their Requirements

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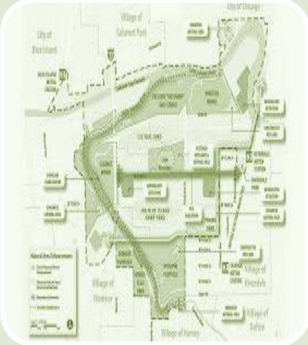

Innovation

Putting a mechanism in place to foster the generation of innovative ideas in areas of green economy and sustainability

Efficiency in Buildings

Establishing minimum technical specifications for buildings and infrastructure

Certifications

Setting the minimum requirements for sustainable certifications for buildings and infrastructure

Sustainable Master-planning

Setting the minimum requirements and criteria for sustainable master-planning for infrastructure

You decide!

ENERGY

Energy Consumption , Production, Distribution, And Utilisation In Industries, Processes And Facilities

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Renewable Energy

Energy that is collected from resources which are naturally replenished on a human timescale, such as sunlight, wind, rain, tides, waves, and geothermal heat

Green Technologies

The application of technologies to conserve the natural resources, and to curb the negative impacts of human involvement in the field of energy

Conservation and Management

Pursuing responsible, sustainable and managed consumption of energy

Demand Side Management

Modification of consumer dem and for energy through various methods such as financial incentives & behavioral changes

You Decide!

TRANSPORT

The Transportation Network Infrastructure, Vehicles And Fuels Used Within The Boundaries Of The Free Zone And Connecting It To The Public Transportation Network

Clean Fuels

Fuels that have a lower carbon intensity than the standard for the fuels they replace (petrol and diesel). Examples: Biofuels, hydrogen, propane, low sulphur diesel and CNG

Green Technologies

The application of technologies to conserve the natural resources, and to curb the negative impacts of human involvement in the field of energy

Connectivity to External Network

Planning, designing, constructing and maintaining roads network within boundaries of the Free Zone and access to external public transportation network

You Decide!

NATURAL RESOURCES

The Supply Chain , Consumption, And End-use Of Natural Resources In Industries, Processes And Facilities

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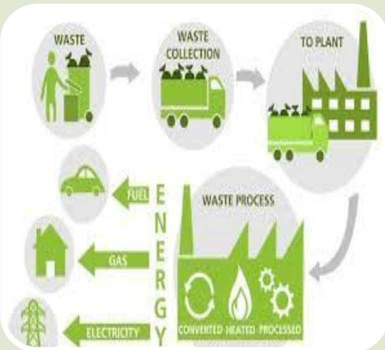
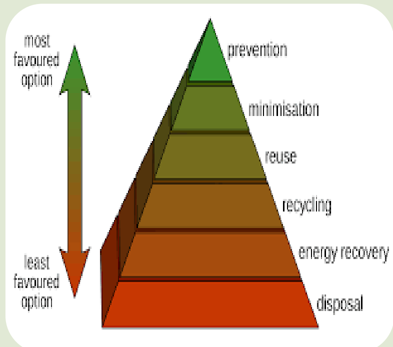


Management of Waste

Adoption of effective and integrated waste management in the planning, implementation, monitoring and reviewing and reporting activities



Efficient Use of Natural Resources

Efficient consumption and allocation of the natural resources available for use, with minimum wasted resources.

Pollution Controls

Setting limits to reduce or eliminate the release of pollutants into the air, water, and land

You Decide!

WATER

Water Processing, Consumption, And End-use In Industries, Processes And Facilities

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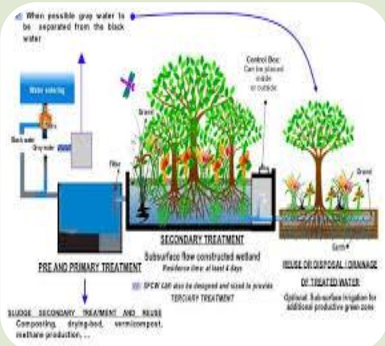

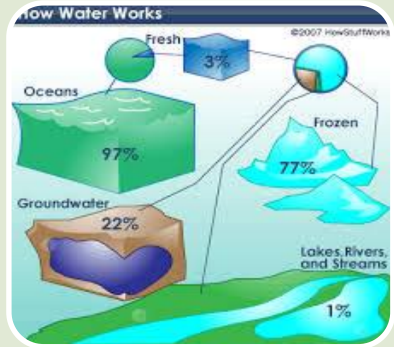

Wastewater Handling Systems

Adoption of effective and integrated wastewater handling systems in the planning, implementation, monitoring and reviewing and reporting activities

Conservation and Management

Pursuing responsible, sustainable and managed consumption of water

Sourcing of Water

Ensuring that the water supply is sourced through a sustainable process, and from a sustainable source

You Decide!

GREEN OPERATIONS

The Steps For The Free Zone And Its Member Companies To Take To Execute Projects And Processes In Accordance With Best Practices

Green Procurement

The purchase of products and services that cause minimal adverse environmental impact and promoting the practice through the supply chain

Green Project Management

Establishing of minimum requirements for green project management practices for the Free Zone and the member companies

Sustainability Reporting

Establishing of minimum requirements for sustainability reporting for the Free Zone and the member companies. Examples: GRI reporting.

Research and Development

Investments in the research and development of green technologies are key drivers to ensure maintaining sustainable production

Logistics

Managing the supply chain to ensure that implementation plans and controls are efficient during the import and export of products through intermodal transportation systems

Management Systems

Establishing of minimum requirements for certified management systems for the Free Zone and the member companies. Examples: ISO 14000, ISO 50000

External Engagement

Scale of Answer

Does your Free Zone make an effort to engage and connect with the external stakeholders?

- ❑ No plans have been implemented
- ❑ Plans for engagement activities with external stakeholders are being discussed
- ❑ Engagement activities take place when relevant policy changes are being introduced in the Free Zone
- ❑ Regular engagement activities take place to consult external stakeholders and obtain feedback
- ❑ Engaged in a platform that enables knowledge sharing of best practices with the larger community and external stakeholders.
- ❑ Not applicable or not relevant

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Certifications

Enforcement

Has the Free Zone established minimum sustainable certification requirements for the buildings?

- ❑ Not at all
- ❑ Only generic guidelines are recommended but they are not strictly enforced
- ❑ Basic requirements are in place, e.g. fulfil minimum set of criteria, but not strictly enforced
- ❑ Basic requirements are in place, e.g. fulfil minimum set of criteria, and are strictly enforced
- ❑ Comprehensive set of requirements is in place with low threshold, e.g. LEED certified or silver, BREEAM pass, good or very good, and are strictly enforced.
- ❑ Comprehensive set of requirements is in place with high threshold, e.g. LEED gold or platinum, BREEAM excellent or outstanding, and are strictly enforced.
- ❑ Not applicable

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Management Systems

Inclusion of Tenants

Has the Free Zone established minimum requirements for itself and the companies within it to have certified management systems, e.g. ISO 14000, ISO 50000?

- ❑ Not at all
- ❑ It is recommended to have at least one of the above but it is not enforced
- ❑ It is recommended to have at least one of the above but there is no need for having the management systems certified by a third party
- ❑ It is required to have at least one of the above but there is no need for having the management systems certified by a third party
- ❑ It is required to have at least one of the above management systems certified by a third party
- ❑ It is required to have at least one of the above management systems certified by a third party
- ❑ Not applicable

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Interactive Feedback Session

- Please rate the categories & subcategories according to significance to your free zone
- You have 9 questions:
  - 1 for rating categories
  - 8 for rating sub-categories
- You have the option for providing us with your own category/sub-category in the "others" section. Rate it as well!

Thank You

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Thank You