

# 2013

SOUTHERN WHITE  
TAIWAN PAPER

南台灣

高雄·台南·屏東

# 白皮書

# Building

# a Better Future Today



KAOHSIUNG · TAINAN · PINGTUNG

This 4th edition has been written by Brian Aiello and Lauren Anderson

## ACKNOWLEDGEMENTS

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AmCham Kaohsiung is proud to publish its fourth annual White Paper in 2013. The unprecedented response and support we received while creating it merits acknowledgement. In meetings with Kaohsiung officials working under the direction of Mayor Chen Chu, virtually every bureau and department contributed in a full report (in English) to AmCham Kaohsiung on current issues and projects. In a meeting with Mayor Lai and the Tainan City Council, representatives from all city departments were in attendance and also issued a comprehensive report (in Mandarin) for their city. Pingtung County officials, representatives from the Southern Joint Services Branch of the Executive Yuan, Tourism and Economic Development Bureau staff, and the National Immigration Agency, Kaohsiung City First Special Operation Brigade (thanks to Ms. Frances Lee in particular for providing immigration data), deserve our heartfelt thanks. Each set aside time to meet with AmCham members for related discussions and provided us with essential information and outstanding cooperation. We wish to express our appreciation and thanks to all of the officials, leaders, educators, entrepreneurs, groups and individuals who contributed. Their combined efforts provided us with an exceptionally complete, southern perspective on a number of issues. In addition, AmCham Kaohsiung members and friends contributed a great deal of time gathering information and offering their perspectives based on their own related industries. We would also like to express our appreciation and thanks to the American Institute in Taiwan (AIT), both in Taipei and Kaohsiung, for all their tireless efforts and support in facilitating this and all of our projects. We would like to thank our colleagues at AmCham Taipei for their 60+ years of excellence. AmCham Kaohsiung would also like to thank Ms. Lauren Anderson, for her energy and fresh perspective, for her outstanding assistance in putting this 2013 White Paper together as coauthor; to Ms. Irene Wu and Ms. Alison Yang for helping so much in arranging meetings and getting the never-ending flow of Chinese information translated into English. Our sincere thanks to Ms. Barbara Shen who, as always, provides us with unsurpassed Chinese translation for our White Paper. Finally, to Ms. Ellen Lu, who has done so much during her short time with us to advance AmCham Kaohsiung through her tireless efforts and tremendous skill. Thanks to all of you who took the time and made the effort to get involved and share your opinions, expertise and experiences for the sake of a better future in southern Taiwan.

Although the Southern Taiwan White Paper represents the immediate business interests of AmCham Kaohsiung members and the local business community, its ultimate goal is to foster the upgrading of Taiwan's economic conditions to the benefit of both local and multinational businesses. The 2013 White Paper deals with issues that are critically important to creating a solid future growth for southern Taiwan. For the Taiwan public at large, it encourages the growth of a broad spectrum of high-quality goods and services to improve the quality of life for all Taiwan residents.

AmCham Kaohsiung's goal is to enhance understanding, communication, cooperation, and commitment as we all work for a better future. Thank you for your attention.

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## INTRODUCTION

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2012 was a memorable year for southern Taiwan. The efforts of the past years are continuing to show improved results; greater continuity within each municipality is becoming realized; several significant projects are nearing completion, and many new development schemes are in works or about to get started. As the south continues in its transition into a cleaner, a more high-tech, a more service-oriented, a more tourist friendly, a more foreign investment friendly, a more international and internationally competitive destination, much progress has been achieved. Yet many challenges and obstacles still exist. Growth in today's world is always difficult. However, if we look hard, we will find opportunities hidden within those hard spots; if we strive for excellence, we will succeed in reaching a higher level; and if we understand our competition, we will also understand how we can better compete. AmCham K would like to acknowledge and commend all of the impressive efforts and improvements that have taken place here in southern Taiwan. The cooperation and mutual commitment of educators, government officials on both the local and central level, as well as business and community leaders has repeatedly demonstrated how by working together, we can accomplish amazing things. We applaud your tireless work!

With intensifying pressure and competition from around the world, improving the local economy and quality of life has never been so complex a task, or one so dependent on so many outside influences. The global economic crisis appears to be slowly fading into memory, but some difficult obstacles that affect us daily, need time to resolve properly. In order to best position itself for a robust future, southern Taiwan needs to seriously focus on a number of issues in 2013, as it prepares for a major milestone coming in 2014. No one can argue the positive effect that came to Kaohsiung from hosting the 2009 World Games. It put development in the south on the fast track with the High Speed Rail, MRT, Kaohsiung Arena and Stadium, and so much more. It was no doubt, a defining time for Kaohsiung's transition into the future; a rebirth of sorts. This was its time to shine; to say "Hello" to the world through friendly competition and sportsmanship. 2014 will be another such year; however this time the focus will be on commerce. The May 2014 inaugural event for the brand new Kaohsiung International Convention & Exhibition (C&E) Center will be the 2014 International Boat Show. This event will feature as many as 1500 vendors from around the world, and will highlight Taiwan's own world-class yachting industry. This event ties into the completion of both the C&E Center and the Yacht Manufacturing Center at the end of this year, and is quite possibly the most ambitious commercial activity southern Taiwan has ever attempted. What cannot be overlooked is that this event will have a major impact on the future of not only southern Taiwan, but the entire island. It will affect tourism, service, finance and trade industries. The organizational work and preparations we

make in 2013 will have a direct impact on the success of this effort to introduce Kaohsiung to the world.

The end of 2012, and beginning of 2013, brought significant steps in trade and the relationship between Taiwan and the US. With the ban on US Beef little more than a bad memory, and Taiwan's inclusion into the US Visa Waiver Program, things are looking quite good for further exchanges and the resumption of the Trade and Investment Framework Agreement (TIFA) talks. Stronger trade with the US is not only good for stimulating both economies and creating jobs, but it also sends a very strong signal to the world; that Taiwan is a valued and trusted partner, and that the largest economy in the world believes that there is good cause in working on raising the bar, when it comes to partnership with Taiwan. But it also does more, much more than that for Taiwan. By establishing a TIFA with the US, Taiwan becomes more attractive for foreign investment and relocation, and trade agreements with other countries become easier and more likely. With Taiwan looking to join the TransPacific Partnership (TPP), the TIFA agreement is a major step in getting there while establishing much needed stronger economic ties and building bridges through business.

Local airport, harbor and marina modernization and internationalization programs to make these facilities as environment-friendly and business-friendly as possible to the world are more important than ever. Transportation, tourism, foreign investment incentive packages and a series of development projects are continuing to form a more complete *and* competitive southern Taiwan, with the goal of firmly establishing southern Taiwan as a place where cargo is trans-shipped, people vacation, companies invest and corporate leaders and staff relocate, work and live, and where high-tech and clean energy manufacturing is among the expanding portfolios of Taiwan's southern cities. Towards this goal, the south has been keenly focused on improvements in these areas. Although there is much more to be done, Kaohsiung City deserves recognition for all their great work, as does the central government for their vital role in area development. Likewise attention to future needs in the Tainan region have yielded major improvements with no less ambitious development projects in planning or in works. Even though these two municipalities share many of the same challenges that come with recently merged city/county environs and the need for evolution in their main economic engines, they still need to maintain historically important local characteristics and cultural richness while they modernize and expand. Pingtung County is also responding in a very proactive manner, having learned some harsh lessons from Typhoon Morakot, which devastated the area and forced a serious rethinking into how best to minimize the negative impact of future natural disasters.

For America, Taiwan can be the land of opportunity. With its continuing robust economy, and its focus on becoming a world leader in virtually everything it does, Taiwan represents a wealth of business needs, choices, and prospects for all



forms of US business relationships, on every level. This includes the growing potential of Taiwan becoming the best gateway to China and Asia. Due to its geopolitical position, stability, democratic system governed by the rule of law, possessing the type of legal foundations and respect for Intellectual Property Rights, it should inspire confidence with US businesses. While at the same time, Taiwan has the historic, linguistic and cultural connections with its regional neighbors. Taiwan just might be the perfect middleman for Asian commerce.

With development and growth comes the need for more reliable, clean electricity. Taiwan's nuclear energy program has been around for years; reliable yes, but not without controversy. However, the March 2011 earthquake in Japan and tsunami that followed killed nearly 20,000 people and triggered the world's worst nuclear crisis in 25 years when the Fukushima-Daiichi nuclear plant was destroyed, leaking radiation into the sea and air. As of December 2012, all but two of Japan's 50 nuclear reactors had been idled since the Fukushima disaster, while the government reviews safety. Nuclear safety in Taiwan has come under a microscope as well. The fourth nuclear power plant, still under construction, is the focus of fear, concern and protests. While there has been little proof that those fears or concerns are justified, the public needs to know that it is safe. Taiwan must look towards a possible future where nuclear energy plays a significantly different role in the island's energy profile than it does today.

Much of the future success in southern Taiwan rests squarely on two legs of support; the tourism and service industries, and clean, high-tech manufacturing. This puts unprecedented emphasis on the importance of educating today's students, and preparing them to be vital and productive members of tomorrow's workforce. Training and curriculum must be focused like never before on the future needs of the economy. With high-tech replacing many old ways of manufacturing, even jobs that were considered dirty manual labor are evolving into fully automated industries requiring technicians and engineers. The single biggest growth industry this century will most likely be in clean energy and improving the environment, requiring all forms of engineering, design, technical, installation and service personnel. Medical and legal professionals will be in higher demand as greater foreign investment in Taiwan brings new business opportunities in biomed-tech, nano-tech, mobile tech and computer tech that will result in new patents, products, methods and licensing.

On the tourism/service industry side, everyone from tour guides, drivers, restaurant staff, hotel staff, bankers, tourist attraction developers and staff, foreign franchises and so much more are needed. This will no doubt raise the level of global awareness of Taiwan and the requirement for Taiwan to communicate with the world. Since English is still the number one language for business, southern Taiwan needs to step up its game in training and integrating English more into daily life and education. In order for southern Taiwan to meet the needs of future business

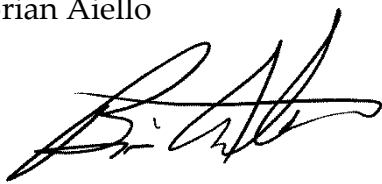
development, Japanese, English and Spanish are going to become more important when seeking new and greater opportunities.

In all of this, it is the essential role of education to prepare the future workforce.

For southern Taiwan to fully realize its collective goals for the future, it must continue efforts to Connect, Communicate, Coordinate, Cooperate and Compete. Each aspect of developing the future needs to maintain this “5-C” policy. Each aspect of this white paper is interrelated, just like the communities in which we live. We must approach our future with a clear vision of the big picture, knowing that every single detail is fully dependent on the successful implementation of several programs, projects, initiatives, and the participation of a lot of people.

Throughout all the challenges and improvements, obstacles and developments happening in southern Taiwan, significant opportunities are available for entrepreneurs, national and multinational corporate leaders, and investors that should not be overlooked nor underestimated.

Brian Aiello



President – AmCham Kaohsiung.

This fourth edition of the Southern Taiwan White Paper is published by the American Chamber of Commerce Kaohsiung (AmCham – K). It includes an overall assessment of Southern Taiwan’s business climate, a review of the current priority issues identified by the Chamber, as well as recommendations for each topic. The primary purposes of AmCham-Kaohsiung’s annual white paper are promoting understanding, providing information, and supporting advocacy. This document outlines suggestions to the Taiwan government and public on issues that have a significant impact on the business environment in southern Taiwan. It is also used to inform government officials, elected representatives, and other interested parties in the United States about Taiwan’s business climate.

This 2013 edition of the AmCham K White Paper has been co-authored by;

Brian Aiello and Lauren Anderson

Ms. Lauren Anderson is currently a Fulbright grantee serving as an English Teaching Assistant in the Kaohsiung countryside. She spent the previous three years in the education department of EdVenture Children’s Museum and a year in service as an Americorps VISTA. She will pursue an MBA at the University Of Chicago Booth School Of Business with the class of 2015. Hobbies include hanging out at the noodle shop below her apartment and doing yoga. Her favorite Taiwanese food is stinky tofu.

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## KEY RECOMMENDATIONS

2013 will certainly be a critical year for southern Taiwan's future. Resumption of imports of US beef, acceptance into the Visa Waiver Program, the re-launch of TIFA talks, the cooling off of China's economy, the continuing European debt crisis, and global security converge to add further complications into the economic mix that is southern Taiwan.

- Talks are underway with Hawaiian Airlines about launching **direct service to/from Kaohsiung** and Honolulu. Hawaiian consistently ranks as one of the world's finest airlines and they are in a MAJOR expansion mode in Asia, so **Kaohsiung must seize the day**. Attract direct KHH air service to/from the United States and every industry gains ground. Kaohsiung remains in a more challenged position as long as layovers in Taipei/ Tokyo/ Seoul/ Hong Kong remain mandatory to reach the United States.
- The upcoming **2014 International Boat Show** represents the highest profile commercial event ever for southern Taiwan. Extensive preparation is required in order to ensure its success. Although this is a Kaohsiung event, Tainan and Pingtung stand to reap the benefits of a well-organized and coordinated event. Taiwan is an electronics and computer giant; therefore we should utilize those strengths in creating mobile apps that can bring easy and comprehensive access to the rich variety of culture, activities, shopping, accommodations, and foods. Local governments need to put together not only the best presentations possible, but also look at this event as a great opportunity to attract new business and investment.
- The new **Kaohsiung Main Library** should consider stocking a large selection of books in English and Japanese in order to provide a broader reading experience for all residents and to attract more foreign investment and talent to the workforce, offering nourishment for the mind. In addition, an e-book program should be established to allow for "borrowing" of books by individuals with identification cards or resident certificates. Foreign language books in English and Japanese should be available based on demand and population requirements. Registration for the e-book program should be available either online or in person, with first time use requiring a visit to the library in person. E-books do not deteriorate over time or ill-use; temperature and humidity do not affect e-books either, therefore once in the library's system, they will remain available indefinitely. E-books can also be well-utilized throughout the academic world in Taiwan from 1<sup>st</sup> grade to post graduate learning materials.
- **Communication and cooperation between local and central governments** has improved. In order for the south to continue in its path to real growth, the central government still needs to play a major role and the local governments need to be as willing as possible to communicate and cooperate. Political differences will



always play some role in local/central government relationships. However, by working together, all of Taiwan will benefit and we all become stronger.

- The importance of **Sister Cities** is clear - with a great example being the MOU between Miami and Kaohsiung for mutual cooperation in organizing the 2014 International Boat Show. Local officials need to schedule more meetings and arrange for visits to their US counterparts in order to strengthen the bonds of Sister City relationships and maximize shared benefit.
- In larger development projects, such as Dapeng Bay, where big investment is needed from private sources, local governments should consider more attractive terms, especially for the “**big names**” like Planet Hollywood or Hard Rock Resorts. These “big names” themselves would attract additional smaller but equally important investment that will create a more complete and successful project. Do whatever it takes to catch the brand names; this will draw larger numbers of smaller ventures.
- City planning for Kaohsiung, Tainan, and Pingtung require different thinking consistent with the unique nature of each municipality and consistent with their respective vision of development. *Kaohsiung* is a former industrial powerhouse that needs to continue to become a clean, green, multi-faceted destination for travelers and business investment alike. Having hosted the 2009 World Games, Kaohsiung’s progress has quite a head start on its neighboring communities. Tainan has a history steeped in spiritual culture that is still evident throughout the city today. It needs to develop quite carefully by attracting high-tech and green enterprises that complement its culture and historical sites. This is no easy task. Out of the three southwestern Taiwan municipalities, Tainan has the most difficult work to do. If it is to retain its history and culture, it must be quite creative in how it develops. Fortunately, Tainan is filled with creative people who are up to the task. Pingtung has perhaps the least complicated, but largest amount of work to do, in that it has the cleanest slate to work with. Devastation from the 2009 typhoon Morakot has almost left a blank sheet for development, albeit at a great loss that always comes from natural disasters. The county’s agriculture/aquaculture based economy took a huge hit from the storm, which also taught a valuable lesson; rebuild in a way that will minimize future vulnerabilities. Develop solar, ecotourism, indigenous assets and add in a world-class international resort called Dapeng Bay, and you’re in business. While the previous statements severely oversimplify the situation, what needs to be kept in mind is the importance of coordinating development so that it complements surrounding areas and adds value overall. Make sure that all supporting infrastructure and businesses are planned into the future as well, so you don’t end up with a paradise in the middle of nowhere that no one can easily travel to or from. Good city planning can save years of delays and millions of dollars. In order to realize your fullest potential in tourism and foreign investment, you need to make sure that foreigners who visit your areas come away with the feeling that, “I can’t wait to come back again soon”. “I want my family to experience all of this”. “I can live and do business here”.

- Attracting new and/or **foreign investment** in southern Taiwan is a matter of **great marketing**. A city needs to ask itself specific questions while developing its marketing strategy for bringing in good investment. What does this city have to offer in terms of logistics, investment-friendly taxes, free-trade zones, and investment and relocation initiatives? What commercial and industrial space, human resources and a trainable workforce (a skilled workforce that can get things up and running quickly) are available? Is there an already trained workforce that has learned relevant skills at local universities? What are the major benefits of its good stable climate (political, economic, health & safety, eco-friendly, educational and of course, the weather)? Why is this city worth investing in for the short term *and* long term? What does this city have to offer in terms of lifestyle advantages over competing locations that are also aggressively seeking investors? What treats await the adventurous and what comforts are there for those who seek peace in their lives? What local flavors and what well-known international franchises and names does your city have?
- With 40% of American firms currently located in **mainland China** wanting to leave, an important opportunity exists for Taiwan as an intermediary, hub, facilitator and liaison; for Taiwan to serve as a true gateway to Asia for multinational companies to partner with confidence. Taiwan is a democracy based in the rule of law, with protections for businesses that are well within the comfort zone; a place where experience, language, culture, enterprise, and creativity can smooth the way for doing business throughout Asia. Singapore, Malaysia, Thailand, Indonesia, Vietnam, Cambodia, Laos, and the Philippines are all vying for investment and foreign companies. Southern Taiwan needs to be better at marketing and competing with these areas if it is to see real improvements. Taiwan ranks as the second-best (operational risk) investment destination in Asia (BERI), and sixth in the world in reserves.
- **Green energy** is a growth industry that will stimulate the economy, create jobs, and improve the image of Taiwan for decades to come. The south looks to make its mark in the solar industry in a big way. New US import tariffs on solar products made in China give Taiwan's solar industry a boost in competitiveness. With lots of sunshine and available land, the solar industry should be right at home in Kaohsiung, Pingtung and Tainan alike. By developing this industry, solar power can also help to reduce southern Taiwan's carbon footprint. Recent changes by the central and local governments seem to indicate that there is a trend to make solar power more accessible for residential and commercial use. Advancements in wind and ocean power are also ideal for Taiwan's geography and climate. Taiwan should also take a new look at geothermal because advancements make it possible to harvest cheap, clean energy without disrupting the beautiful scenery.
- Continue efforts to "**typhoon-proof**" areas where new solar and wind power development will take place. With the excellent amount of sunshine days in this part of Taiwan, solar technology is a natural industry to promote. Wind, water

and flood control measures must be put in place to eliminate concerns from potential investors.

- Develop more **US/Taiwan partnerships** regarding the growing emphasis on solar power centers for Kaohsiung, Tainan and Pingtung, where the geography, climate and people are all perfect for development. Make southern Taiwan the Clean Energy Hub of Asia.
- Organize more visits from American companies to southern Taiwan with coordination by government agencies such as **TAITRA, AIT, MOFA, MOEA, and AmCham**, for the purpose of discussing the great investment opportunities in the south. Developments in clean, high-tech industrial and science parks should be well-defined for potential investors.
- Continue to support initiatives, low cost financing and grants to help our traditional **petro-chemical** industries modernize in ways that will minimize harm to local economies and employment, while giving them the resources they need to become more in line with the environmental vision for southern Taiwan. Work closely with those who are trying their best. Penalize those who are the worst environmental offenders.
- Continue efforts to enhance business development: having easy “**One-Stop-Shop**” access to comprehensive investment data is vital to attracting new opportunities into southern Taiwan. This information needs to create interest and “sell” the area(s). Steps need to be taken to improve its exposure by linking it to all city web sites and via online search engines. **MAKE IT INTERESTING!**
- Kudos to **Kaohsiung American School (KAS) and Morrisson Academy** for the quality of education they offer and kudos to Mayor Chen for supporting these international schools! KAS, under Dr. Tom Farrell's watch, has established an impressive track record in placing its graduates into top Universities. Morrison Academy announced it will expand to include high school curriculum in its Kaohsiung campus. Quality, targeted education is perhaps the primary means of assuring a successful and robust future. Continue expanding communication, cooperation and commitment between government and academia, with close input from industry and commerce so the workforce of tomorrow can be best trained today.
- Establish **open learning and education reimbursement programs** to help existing workers learn new skills that make their employers more competitive.

## EXECUTIVE SUMMARY

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### The Vision of Southern Taiwan's Future

- Development requires **easy access**, a comprehensive and convenient choice of mass transit, smooth flowing traffic and adequate parking.
- The continuing global economic crisis, the ongoing drug war in Mexico, Brazil's ambitions for growth as it prepares for the 2014 FIFA and 2016 Olympics, and the cooling economy in China will continue to place more emphasis and **demands on Taiwan's creativity and business abilities**. If brain drain can be minimized, Taiwan can position itself as the perfect hub for business to, from and in Asia.
- The move from Kaohsiung's traditional heavy industry manufacturing base; from Tainan's historic, cultural and spiritual foundation; and from Pingtung's agricultural economy to **cleaner, higher-tech, tourism and service based economies will lead to real sustainable growth** and robust economic stability. Renewable energy technologies, foreign investment, tourism, and corporate relocation to the south are common essentials.
- Make **traditional industries** vital community members by assisting in cleaning up while providing support and resources to assist upgrades.

### ECFA, TIFA, TPP and the WTO

- The Economic Cooperation Framework Agreement (ECFA) is another year older. The end of the ban on US beef and the acceptance of Taiwan into the US Visa Waiver Program, the resumption of the stalled TIFA talks are all very **positive steps for both Taiwan and the US**. Further adoption of international standards and protocols are needed in order to take better advantage of working through the WTO. Taiwan needs to work towards becoming active in the TransPacific Partnership while it seeks additional trade agreements abroad. The entrepreneurial spirit and creativity of the people in Taiwan is an amazingly strong force.
- Promoting "Made in Taiwan" **branding**, as a world leader, while at the same time getting a better understanding and compliance with worldwide standards is even more important than ever before. Think "Made in Taiwan, Enjoyed Everywhere". At the same time, Taiwan needs to forge new international partnerships in order to be more competitive in the global market. Mobile technology, clean energy innovation and creative positioning as the ideal gateway to Asia are primary items that need to be remembered when exploring any new business, partner, or investor.

## Providing a Balanced Education

- Education and training is easily the **most important investment** needed to ensure a successful future for southern Taiwan. Government and academia need to clearly assess the future needs of tomorrow's workforce. We will need engineers and designers who can cultivate future technologies. We need multilingual MBA's, tour guides, hotel management and staff, and restaurateurs. We need the best graphics artists, IT specialists, software developers and computer techs in order to stay on top of the competition. We need **multilingual** government staff, transportation workers, and retail employees. We need people who can clearly express why their products, their cities, their activities and events, their venues and their industrial and commercial areas are ideal for a global market. We need to educate and train locals and exchange students in ways that will allow them to stay here after graduation, get good jobs, and raise happy, healthy families in a secure and safe environment. We should also create **open learning** programs that will make it possible for workers to advance their skills and knowledge. The government, academia and enterprises should partner in a program that will reimburse staff that make the extra effort to gain a degree or credits for related courses that will benefit their employer by helping to raise the level of knowledge and competence.
- Investment of time and resources in **school systems and business partnerships** would give businesses more say in how the future workforce is developed, give students a better chance of obtaining a job that fits their skill set, and give schools an understanding of area business human resource needs.
- Continue and expand **ongoing dialogs between the local government and educators** to ensure learning institutions get what they need to prepare students for careers in green technology, arts and science, engineering, high-tech, and the sports, leisure, and tourism industries. Work at creating better communication with foreign educators whose native languages are being studied by tomorrow's workforce. Continue working with local schools and foreign teachers in order to more clearly understand what is best for students, and how to allow for more native English speakers to teach classes in all subjects to broaden the mindset of students and best prepare them for the future. Get foreign educators more involved in the development of new programs.
- **Expand courses** targeted at fostering the tourist industry: hotel and hospitality management, international cuisine, tour management, event management for concerts, and restaurant management.
- Consider investment in **early childhood (birth-5 years old) education** because these programs have a return on investment of 6%-10% that is

realized through lower medical costs, lower crime rates, and higher workforce productivity.

- **Project based learning** and more **comprehensive assessments** of students should be employed. It is the development of persistence, attentiveness, and working with others that create a productive workforce when combined with cognitive skills.
- It is essential to encourage and support **international schools** if we want to have truly international cities. Private schools must continue their outstanding efforts to reach out to assist the community and the community needs to embrace private schools that are dedicated to being a positive partner in raising the children of southern Taiwan. Public and private schools have many programs, resources, staff, and ideas that can be **shared** and in doing so, will benefit all students. Working together for quality education for all students should be the call for all educators and governmental officials. High quality private schools help greatly to attract foreign companies and skilled talent, in addition to providing a jumping off point for Taiwan students seeking to continue their education abroad.

### **Energy and the Environment**

- Renewable and sustainable energy will continue to dominate the domestic and global economy for decades to come. Taiwan must continue to seize this opportunity to be a **world leader in clean energy** so that it can exchange ideas and technologies with its friends, develop innovative solutions and export a better future to its neighbors. Southern Taiwan has ideal conditions for the development of many clean energy technologies, demo projects, and systems integration.
- Nuclear energy has become more controversial since the earthquake and tsunami that affected Fukushima, Japan. Taiwan needs to look at all available options, whether it intends to rely on nuclear in the future or not. This includes **cutting edge nuclear technologies and alternatives**. Since Taiwan relies so heavily on nuclear energy, it must proceed with caution of course, but also with an open mind for new scientific advances and hi-tech progress in nuclear and geothermal. New data and computer models that can factor in the events from Fukushima can be helpful in creating new designs and systems. Energy safety and security are paramount, with cost also being an important factor. Taiwan can look at this challenge as a new opportunity. Work to become the model for clean, safe, reliable energy as an innovator and then market the technology.
- Balance clean energy development with tourism opportunities. The two industries should be in constant **communication** to ensure that negative environmental impact is minimized as growth in tourism increases.



## Tourism

- Develop **high quality** tourism experiences, especially as the market is flooded with tourist groups from mainland China now.
- The average national tourism income is 10% of GDP. Taiwan's average is at 4.6% of GDP, so there is **room to grow** with possibilities in ecotourism or other targeted groups such as LGBT tourism.
- Developing a **tourism workforce** requires sustainable wages and a manageable work schedule. Tourism students should be utilized to conduct **surveys** at transportation hubs to gain more insight for the industry.

## Business Development

- Work to fill up vacant **commercial space** and create new commercial and industrial spaces that are well supported and provide real attraction for foreign investment and a good reason for Taiwanese businesses to return to Taiwan.
- Integration of English and Japanese for **signage** and increasing public proficiency is critical this year. With the 2014 International Boat Show just 14 months away, there is little time to prepare and much to do in order to make sure we are ready to welcome the world in May 2014.
- We live in an **online and mobile** world. With that in mind, new ways to provide information in easily accessible, clearly understood, flexible, reliable, up-to-date formats is essential. Mobile apps are convenient, can be done in various languages, updated easily, and used by more people at street level than any other format. We need to not only continue to perfect our online information and presentation, but also make it mobile. Laptops, Ultrabooks, tablets and smartphones are everywhere and being used by more and more people each year. Tap into this potential market in the most efficient way possible; online and mobile apps for **Android, iOS** and **Windows** systems will ensure maximum accessibility. There are over 7 billion people in the world, 2.4 billion using the internet. Global smartphone users just passed 1 billion, but are expected to reach 2 billion by 2015. Clearly, if you want to reach the largest audience, online and mobile applications offer the best way.
- An **all-inclusive business registry** system designed to make it easier to attract foreign investment and establish new businesses needs to be put in place, easy to access and use, and regularly updated. Saudi Arabia and the UAE are good examples of efficient consolidation of offices and resources for foreigners.

- **Diversify** economic links to create a strong financial economy that can absorb the impact of financial flows.
- Some multinationals are breaking up their one Asia office into **regional hub offices** and southern Taiwan should bid for these timely opportunities with their low cost of living, competent work force, and beautiful weather.

### **The Big Picture**

- Southern Taiwan must continue its efforts to firmly establish and maintain six (6) key advantages for attracting foreign investment:
  1. Excellent geographical position and logistics;
  2. Outstanding sea and airports with a natural advantage of good year-round weather;
  3. All-inclusive industry clusters;
  4. Abundant manpower supply;
  5. An extensive industry transportation network;
  6. Comprehensive necessities for foreign businessmen including excellent accommodations, restaurants, mass transit, and entertainment.

## TOPICS

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**INTERESTING NUMBERS**; important for Taiwan, critical for southern Taiwan.

**2<sup>nd</sup> Best Asian Investment Destination**: On January 17<sup>th</sup>, 2013, Taiwan's Ministry of Economic Affairs (MOEA) said Taiwan is ranked as the second-best investment destination in Asia and fourth in the world, citing a recent report from a leading US-based research institute. The research institute Business Environment Risk Intelligence S.A. (BERI), surveys the investment climate and competitiveness of 50 economies in April, August and December of every year. In its December report last year, BERI's assessment of Taiwan was 72 points, while Singapore leads Asia with 78 points. China and South Korea scored 57 points, sharing the ranking of 14<sup>th</sup>. Japan scored 56 points, ranking 16<sup>th</sup>. The survey is comprised of three major categories, including operational risk, exchange rate risk and political risk; of which, Taiwan ranked second, fourth, and eighth respectively. Taiwan's operational risk index ranked second in the world, trailing only behind Singapore. BERI indicated that it views the Taiwanese government's efforts in seeking private funding for public infrastructure projects favorably. Overall the institute deemed Taiwan's operating risk as comparatively low, and expects Taiwan to keep its second-place ranking until 2017. Taiwan's exchange rate risk index ranked fourth in the world, trailing behind the Netherlands, Switzerland and Singapore. The institute indicated that Taiwan's monetary situation is sound, and has relatively low exchange rate risk; the island's annual merchandise trade surplus for 2012 was estimated at US\$30.34 billion with a current account surplus at US\$43.77 billion, up from US\$28.7 billion and US\$40.78 billion respectively, in 2011. Based on performance in the first three quarters of the year, BERI estimated that foreign direct investment in Taiwan exceeded the target of US\$10 billion in 2012. BERI predicts that Taiwan will continue carrying out the liberalization of foreign investment in order to attract foreign investors. Exchange risk will remain low, ranking No. 4 in the world in 2013 and rising to No. 3 in 2017, and expects additional deregulation to promote further foreign investments. The recent downgrade of Taiwan's political risk ranking from seventh to eighth was due to President Ma Ying-jeou's waning approval rating, and controversial policies such as the hiking of utility prices and the implementation of the second-generation National Health Insurance program, consequently casting clouds over the nation's prospects, said an MOEA official. Although Taiwan lags behind Singapore, Switzerland, Austria, Norway, Finland, Australia and Germany in political risk ranking; BERI indicated that it considers Taiwan's political climate as relatively stable, citing Ma's continuous attempts at participating in free trade agreements and maintaining amicable relations with China. The institute also considered the increasing good will in fishing rights negotiations between Japan and Taiwan.

**31% of Taiwanese CEOs believe talent restraints have prevented them from innovating effectively**: special attention must be taken to provide for more targeted education and subsequent job placement. Brain drain continues to be a stubborn problem that hinders greater innovation and growth, and a more robust economy.

**89% of companies in Taiwan plan to change their innovation and R&D capacity in 2012**: executives know that in order to compete in today's global economy, innovation, creativity, efficiency and good logistics are essential. They understand that it is within their power to ramp up their own innovation and R&D capacity. ITRI (Industrial Technology Research Institute) should take a more assertive role in assisting Taiwan companies to innovate, as well as in helping them to conform to global standards. Taiwan's educational community needs to be more connected to the immediate and future needs for providing a future workforce that better meets the needs of industry and commerce.

**40% of US firms operating in Mainland China expressed a desire to relocate** (Source: Capital Business Credit (CBC)'s quarterly "Global Retail Manufacturers and Importers Survey"): This is an excellent opportunity for Taiwan and its entrepreneurs. Doing business with and in China brings

with it a carrot and a stick. The allure of having low labor costs and over a billion potential customers is what draws companies to invest there (the “carrot”). Ever changing regulations, vague legal rights, impotent IPO laws, differences in language and culture, etc. combine to make for a rather significant “stick”. The rise of the middle class and wages in general has essentially wiped out the labor cost advantage in the Mainland. Taiwan represents the best opportunity for those companies unwilling or unable to accept the risks involved in doing business with and in China. Taiwan entrepreneurs have the history, language, culture, experience and business sense that works well in China. U.S. and Japanese companies wishing to do business in and with China would do well to use Taiwan as a hub or go-between. Let Taiwan’s experience and know-how tackle the day to day difficulties of dealing with China. Let experienced businessmen from Taiwan manage China facilities for U.S. and Japanese companies. Taiwan is a democracy that adheres to the rule of law. It has made great strides in conforming to standards embraced by both the United States and Japan. Taiwan’s relationship with each is strong and growing stronger. Because of its geographic, political, social, cultural, and ethical status, it is the perfect business partner; the perfect gateway; the perfect hub. Even the weather in Taiwan is conducive to year-round activity.

## **EDUCATION**

*“The principle goal of education in schools should be creating men and women who are capable of doing new things, not simply repeating what other generations have done. -Jean Piaget, Swiss developmental psychologist and philosopher*

Behind each and every negative economic statistic is the toll taken on our children, and the added burden placed on their future. Children can’t vote and often don’t have a voice, but they are the future; **our future**. They should never be forgotten when analyzing economic and workforce development. Their education today, determines the future prosperity for everyone.

Textbook goals and local standards can be achieved outside of the box in which they are currently taught. This is a worldwide issue, not just a southern Taiwan issue. However, in this ever more competitive world, Taiwan needs to pay careful attention to the education of its future workforce. Education experts and system architects around the world are starting to take a very close look at how students best learn. These ideas and frameworks have already been researched and published. While this is oversimplifying the issue to some degree and there are divergent viewpoints, now it’s time to see which governments will explore these ideas first and thus produce the world’s next generation of leaders and strongest work force.

### **School System and Business Partnerships**

To improve and develop local economies, it is vital for local businesses and education systems to have frequent and open communication. To operate separately is ineffective and inefficient, but when efforts are combined through good communication and cooperation, productivity increases dramatically.

There are various ways for the business and academic communities to partner to reap mutual benefit. One example is the education system partnering with a specific business partner. When Cisco invested in Saudi Arabia they also established NETVERSITY (Networking Academy program), which partnered with public education institutes to provide technical and business training to Saudi students. Cisco has hired 100% of the program’s graduates. Southern Taiwan should propose these types of partnership agreements with its own high profile companies as well as with multinationals. This practice is already in place in schools such as I-Shou University, but it can be expanded.

Another way the education system and businesses can partner is through advisory committees that examine and create strategies for local schools and businesses to work together. A fantastic model of a

coalition is the Midlands Education and Business Alliance (MEBA) in South Carolina, USA. A large part of the economy in South Carolina used to be rooted in the manufacturing sector, similar to Kaohsiung and other areas in southern Taiwan. MEBA is a group of business leaders and educators who put together information combining student interests and area career opportunities for the optimal collaboration so each side can meet each other's needs. Their mission statement is: to connect students, parents, educators and employers to education and career opportunities in the Midlands through programs and partnerships of business, school, college, faith, and other community leaders. They enable students to transition effectively into the local workforce and decrease dropout rates by informing them of available career options and requirements for pursuing their career goals early. Their work includes training experiences for teachers and students, field studies, mentoring, shadowing, internships, and speaker bureaus. They also collaborate to research and develop pieces for parents, students, business leaders, and the community such as "Hot Jobs of the Future" and "Your Child is Job #1". For more information on MEBA and downloadable resources please see <http://mebasc.com/resources/>.

There are two additional programs that can have direct benefits to the existing workforce. As technology advances, so do manufacturing materials, methods, and technical expertise needed to make it all work well. Traditionally, existing workers become more valuable in time because of the experience they develop. However, we no longer live in a world where a person can expect a lifelong career at the same job. The rapid advancement in all forms of technology has led to new materials, manufacturing methods, and a whole new level of related knowledge. The traditional worker today faces a new risk: new technology makes their skill set obsolete or less valuable to their company. You might begin to see a disturbing trend where older higher paid workers are being replaced with younger, more technically savvy graduates at lower pay. Gaining fresh knowledge is very important, but so is experience. In America, many companies utilize an education reimbursement program whereby workers can take credited course in subjects directly related to skill-sets required by their employer. The level of reimbursement varies according to the grades received, with top grades earning a 100% reimbursement. This is a great incentive for the student/employee: work hard and get rewarded. This often leads to more opportunities for workers to advance their careers by promotion or upgrades within their company. However, the potential benefit for the employer is much greater. If their experienced staff can learn new skills, they become more productive. This is especially true in companies that can expand their business by integrating new technologies in materials or methods. Giving a highly experienced and reliable worker an opportunity to make the company more competitive or open up new markets is a win-win situation. *Local and central governments should consider subsidizing this type of program.* If Taiwan is moving in the direction of becoming more high-tech, more competitive, more environment-friendly, and having a broader range of industries to maintain growth and a robust economy, this is a worthwhile investment in the future. Maximize the skill of the workforce and make it possible for in-company career advancement for those workers who are motivated to make the extra effort.

As an example, Qualcomm is easily one of the biggest companies in the industry. With the explosion of mobile computing, Qualcomm is likely to continue its leadership role in the future. Qualcomm utilizes this type of education reimbursement program, and both employees and employer benefit. A Kaohsiung company has Qualcomm as its main client. Although Qualcomm has a reimbursement program, the local company does not. This creates risk. Will technology outpace the local company's ability to deliver at a profit? Will a lack of advanced and timely education/experience ratio make them less competitive as Qualcomm's needs increase? Will a void in their own R&D department cause it to be unable to vie for future business because it cannot meet the required techniques, material design and engineering, or manufacturing skill-sets? Will a lack of knowledge/experience cause them to lose out on new business opportunities? The idea here is that steps should be taken to create and ensure a workforce that evolves proactively with the industry by working together with continuing education.

The second program that should be considered is Open Learning, where students whose lives make it difficult or impossible to attend traditional classes can opt for alternate methods of taking courses; typically online. There are some open learning programs already, but they really need to be expanded to meet the current and future needs of Taiwan's workforce.

Low birth rate=less students=less income for education system=less highly skilled workers. This is perhaps one of the greatest challenges we face. We need to attract more students from abroad if we are to prevent the closing of vital centers of education here in Taiwan. Taiwan should also look to advancing cooperation with overseas Universities to attract more exchange students to Taiwan, who can then become an asset to the future Taiwan workforce in terms of innovation and global perspective thinking. Academia coordination with local institutions and study abroad experiences need to be enhanced. Young people/marketers/bloggers are going to be the best ambassadors to the international community. Academic scholarships for foreigners are a great way to get Taiwan universities better known globally. Consider awarding scholarships to foreign student candidates who meet the most urgent needs for making Taiwan more competitive.

If southern Taiwan could form these types of partnership and establish these programs, it would increase the quality of the workforce thus attracting knowledge-based industries to the area and stopping the brain drain to the north or overseas.

### **The First Five Years = 85% of a Child's Brain Development**

Many economists, educators, and journalists have researched and proven that the first five years in a child's life determines much of the rest of their life and educational potential. Investment in the early years promotes efficiency and reduces inequality. The sooner southern Taiwan embraces these efforts, the sooner the workforce can be improved and attract more investment while improving the quality of life for local citizens. Early efforts should focus on the most effective methods for learning; in essence, teaching children the best way to learn. This improves comprehension and knowledge retention, nurtures creativity and allows for the absorption of more knowledge as they grow up.

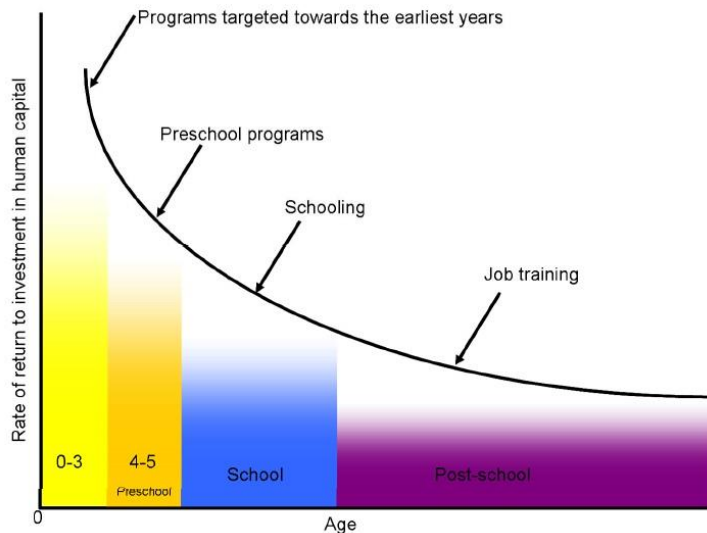
The American Ounce of Prevention Fund states that: at-risk children who don't receive a high-quality early childhood education are:

- 25% more likely to drop out of school
- 40% more likely to become a teen parent
- 50% more likely to be placed in special education
- 60% more likely to never attend college
- 70% more likely to be arrested for a violent crime

James Heckman received the Nobel Memorial Prize in Economics in 2000 for his work in developing human potential. His work proved that emphasizing the development of cognitive skills where knowledge can be tested is not optimal in creating productive citizens. *Rather, it is the development of social skills such as persistence, attentiveness, and working with others that can create capable and productive working force when combined with cognitive skills.* A key part of this movement is that it must take place early in a child's life.

With investment in developing social and cognitive skills at an early age, ROI rates are between 6-10% and are realized through lower medical costs, lower crime rates, and higher workforce productivity. In a US federally funded program that tracked participants until they were 26, every dollar spent at Chicago parent-child centers generated \$4-\$11 in return.





Source: James J. Heckman 2008

### Project-Based Learning

The depth to which the community and students benefit from the education system could be strengthened through integrating project-based learning into the curriculum. This takes information in textbooks and puts it in the context of the real world and a student's real local community. Integrating projects that utilize multiple original and secondary data such as analyzing local water quality or producing the history of their town would truly provide context and meaning to every subject from science to English language studies. Projects could last a week or an entire course length and multiple projects can lie within one theme or lesson. An important part of project-based learning is students presenting their findings and experiences to their classmates, teachers, or community members. The discussion and presentation that follow project-based learning experiences improve collaboration and give students a clear venue to process knowledge gained and their learning experience. With project-based learning, students don't memorize isolated facts from a single source, but discover education on a personal and deeper level through a wide range of sources that put learning into context.

### Comprehensive Assessment

The next reality television show will probably be called "Extreme Testing". All humor aside, the reality is that testing, all around the world and starting in elementary school is getting to be extreme. Testing is extremely stressful for students, teachers, administrators, governors, and presidents. Tests can determine a student's self-worth and future school placement, a teacher's paycheck, an administrator's promotion, a governor's second term, and a president's global reputation. If so much rests on these tests, more attention should be paid to the actual efficiency and content in them. It is a common theme among students that the main thing they learn in Taiwan is how to take a test. Material is memorized and promptly forgotten immediately upon completion of the related test. More emphasis needs to be placed on comprehension and retention.

Most tests are specific and have no attention paid to an individual. A main component is not how a student will be able to express their knowledge but how long it will take a teacher to grade it. Governments, schools, communities, and parents need to learn from all the data mining and technologies that businesses employ to better reach their consumers. These technologies can be utilized to enable fundamentals of education like knowledge and empowerment, to reach every student, not just those who are "mainstream" learners.

A test should be a part of the learning process, not just the end. Students should digest and learn from their mistakes; not simply write down the correct answer. The results of these tests should contribute to the dynamic profile of each student; which should also include components such as behavior, past interests, and ambitions.

### Electronic Books and Tablet Computers

E-books and tablet computers open doors for students and teachers alike. They are good for the environment, holding children’s attention, and having the flexibility to be an excellent carrier for the diverse spectrum of learning styles that a classroom holds.

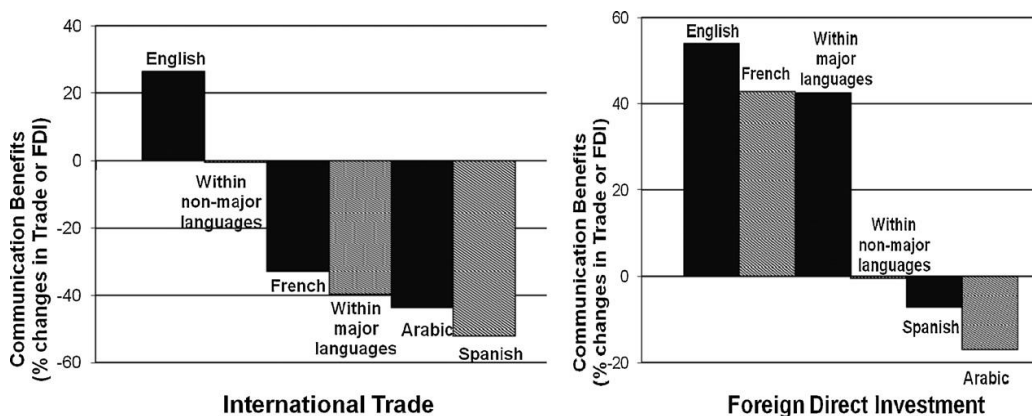
Tablets create accessibility for all students through gesture-based screen readers with a variety of speeds and languages, wireless braille displays, zoom features, color contrast adjustments, and headset compatibility.

Recently, this new tool has been explored by districts in many ways. Most have deployed the school-owned tablets on a one-to-one basis either for the year or for the student’s academic career. An information session for students and their parents can be required prior to receiving the tablet. From a technical standpoint, this project should not be taken lightly. Lexington School District One in South Carolina set up tablets for all high school students, 6,500 of them, through 1,200 Cisco Wi-Fi access points (centrally managed), with a technician at each of the schools specifically trained for tablet configuration and issues, and confirmed server capabilities before the project began.

Children in the 21<sup>st</sup> century learn differently than children in the 20<sup>th</sup> century so let’s not allow education to get left behind.

### English Language and Foreign Teachers

Why learn English? According to W. Travis Selmier II and Chang Hoon Oh in their “International business complexity and the internationalization of languages”, English has the greatest effect on trade and FDI (out of the four trade languages (defined as those spoken by 100m people or more and named the official language by at least 10 countries) French, English, Arabic, Spanish).



### Language hierarchy in major trade (Source: Selmier & Oh, business Horizons 2011)

So what does this mean for Taiwan? Develop a thorough English language learning curriculum. Consideration and effort should be paid to employing authentic English language material outside

the textbook while making sure textbook content focuses on real and practical dialogue. This dialogue should correlate precisely with English Village content. It is also important for students to be able to express their own culture in real English language. In Taiwan, having good English skills opens up more career opportunities and higher salary potential. With the goal of growing both the tourist and service industries as well as the desire of many Taiwan companies to go global, English is an essential part of the equation for success.

Foreign teachers are an important part of learning English, as they bring authentic material, dialogue, and culture. This can inspire students to take a genuine interest in English. There are several ways to make high quality English teachers accessible to Taiwanese students. One is to develop a program similar to Teach for China (<http://www.tfchina.org>) or to further develop relationships with existing programs like Fulbright (full disclosure: co-author is a Fulbright grantee). These programs require investment on the local side, so partnerships with businesses should be pursued to share the cost.

Further recommendations in education related to foreign teachers (thanks to Darren for his input) include:

1.) Inclusion - The impression from former foreign teachers (the difficulties that led to their departure) have come from feeling excluded. They felt like an external component functioning in a system they do not truly feel a welcome part of. An increase in English communications, decision making, scheduling, discussions, meetings, events, logistics, operations, etc. may help to rectify this issue.

2.) Program Basics - Students need to strengthen their Basic English skills and abilities (phonics, pronunciation, listening, reading, etc.) to serve as an independent tool and as a strong empowering foundation to build upon and gain self-confidence. Learning the basics well makes everything else attainable.

3.) Program Guidance - Program missions, goals, communication, and feedback are presented in manners that are often poorly defined or indecisive, leaving a notion of doubt and or confusion. An English hard copy of a mission statement, goals, regulations, and feedback, etc. would serve as a point of reference and a foreign teacher's official guide. If the reason for this is that the local institution is not clear as to what that mission should include, then working closely with foreign teachers will help to establish a clear and achievable mission, and benefit future foreign teachers.

4.) Program Support - Facilities are constructed to hold classes, but functional program material is limited (flashcards, worksheets, etc.) to facilitate classes in meeting objectives. It functions somewhat like a computer (hardware) without any useful programs for productivity (software).

These components may serve as a good starting point for students and teachers to begin to facilitate better student educational experiences and achievement, as well as supporting, and improving the program in a sustainable manner.

### **Stop the Brain Drain!**

Two sets of figures published recently concerning Taiwan's employment indicate an underlying problem. Those numbers are less about the labor market itself and more about its educational, social and economic development.

The government's December 2012 monthly report on employment showed that the jobless rate dropped to 4.18 percent, improving by 0.09 percentage points from November. Despite the improvement, unemployment among the young and educated is on the rise.

Meanwhile, a private consulting firm released a report showing that 69 percent of the companies it surveyed expect some of their employees to look for work outside Taiwan, particularly China, as well as Hong Kong and Singapore in 2013.

While an unemployment rate around 4 percent is not exceptionally high (especially when compared to global rates), the fact that more young and educated people are unemployed is worrying. It may mean that employers tend to hire older or more experienced workers or that jobs available in the labor market do not meet the expectations of the young ones who choose not to accept undesirable offers (importance of school system and business partnerships!)

We need to look no further than our students for some answers. Many of them are college graduates whose parents are probably much better off than their grandparents. That means they are under much less pressure to find a job after graduating and can afford to extend their wait for a more ideal job.

The education system itself also contributes to an imbalance in the job market, as employers are unable to find suitable employees while young people cannot find suitable jobs. After more than a decade of education reform, almost all senior high school graduates can now go to college - thanks in part to the fact that many colleges have been upgraded to universities.

On the secondary level, vocational training has become a much less desirable choice. The reason is obvious: parents these days usually do not need their children to enter the job market early to ease family financial pressures. More parents today prefer their children to go to college, and therefore regular senior high schools are their top preferences.

College education is about much more than job training, but the economy in Taiwan, which has seen many of its businessmen move their operations overseas, may not be able to support these young graduates as well as many older and more experienced workers. That's one reason why many Taiwanese workers are looking for work abroad: opportunity. The consulting firm explained its latest survey: Taiwan's workforce is highly mobile and its talents are in high demand in the Greater China region.

For example, China's telecom giant Huawei Technologies launched a major campaign in Taiwan last year, with the aim of recruiting a few thousand professionals. Taiwan's LCD panel industry has also lost many of its executives and engineers to competitors in China. This really harms Taiwan's high-tech industry's ability to innovate and compete.

Indeed, China might be a good destination for job-seekers who are not satisfied with the employment situation in Taiwan, where salary levels have been stagnant. China's quick rise is promising great opportunities. Of course these opportunities come with risks. Some have noted that Taiwanese talent is recruited because Chinese employers want to learn their skills and tricks, after which the Taiwanese workers will be shown the door. That might be true, but the conditions in Taiwan are at the point where the risks of working in other countries are worth taking.

Brain drain will worsen Taiwan's shortage of professionals, as the consulting firm noted. It will undermine the nations' economic development, as foreign and domestic investors alike will hesitate in setting up operations in a country where they cannot find sufficient human resources.

The more talent leaves, the less investment Taiwan will attract. The government, education and business sectors together must all work out measures to stop this exodus of talent.

### **Private and International Schools**

Private and international schools are an important part of the community due to their ability to spend more money on materials, teachers and activities, which obviously benefit their students. But they also help to raise the overall standard of learning through numerous community activities and outreach programs. Private and international schools are often quite willing to share in their experiences for the benefit of the community at large and are all too often an untapped resource.

### **TOURISM**

Renowned travel guide publisher, "Lonely Planet" chose Taiwan as one of the top 10 countries for travel in 2012. And CNN's travel website, CNNGo.com, ranked central Taiwan's bike path at Sun Moon Lake in the top ten 2012 cycling paths in the world. The website also declared Taipei one of Asia's greatest street food cities. One of the best things to happen to southern Taiwan's tourism industry was the opening of the High Speed Rail (HSR). Something else that will help our tourism is National Geographic publishing the HSR route as one of the best winter trips this year. Southern Taiwan needs to get more time in the spotlight, so efforts are needed to make sure more of what is great about the south is included in the various forms of media.

Tourists can visit southern Taiwan for a myriad of reasons, from its rare and diverse flora and fauna to exploring its authentic and historic cultural significance in Asia. The Tourism Bureau's master plan gives southern Taiwan a historical theme that points visitors to traditional folk and aboriginal culture sites, religious festivals, and historical cities. The Bureau has begun promoting several "spotlight" destinations that include Hengchun Peninsula in southern Taiwan.

Taiwan's tourism income grew from 1.2% of GDP in 2000 to 4.6% in 2011, which is impressive although the world's average tourism income is approximately 10% of GDP. While traditional tourism can see strong growth in Taiwan, investing in high-quality tourism is the key to long-term success. Typically, only two traditional models for tourism exist; high volume/ low cost or low volume/high cost. It's best to figure out which is the better fit for Taiwan, although the high volume/low cost option has not resulted to great benefit to this point, other than being important in establishing more rapid growth in numbers for Taiwan's young tourism industry. When Taiwan opened its tourism doors to the Mainland, restrictions limited tourists to those in groups. The agencies handling these new clients were quite aggressive in getting the best deal for their money. The result was typical for low-hanging fruit: easy to get but never the sweetest, and often bitter. The bitter came in the form of hotels and restaurants having to choose between lowering prices and quality, at the very real risk of losing their traditional clients in order to get the groups from the Mainland, or giving up this attractive opportunity and keeping their quality and pricing the same, meaning that they would remain somewhat stagnant in their existing clientele.

Another interesting statistic is that in the first year Mainlanders flocked to Taiwan in group tours, the average amount spent by each person was only around NT\$1000 (about US\$33) not including hotels and group arranged restaurants, which is pitiful in terms of growing an industry. This lesson was not lost in southern Taiwan and the focus has been shifting towards tourists with more disposable income instead of simply getting a large number of visitors. New development in the south is geared towards attracting visitors who are looking for a rich experience, not only the standard mind-numbing bus tours. There are various pros and cons to approach tourism, but it is best to stay consistent and develop tourism in one of the markets. It is complicated to embrace both of them, but possible. Even so, there are two relatively new markets within tourism that Taiwan can embrace.

## Ecotourism tourism

Ecotourism is an extremely viable tourism venture for southern Taiwan because of its biodiversity and fantastic year-round weather. Southern Taiwan's ecological and cultural niches abound: mountains, beaches, national parks, wildlife refuges, aboriginal culture, and fields upon fields of fresh fruit and vegetables. It has fantastic birding (over 440 species!), hiking, and scuba diving just to name a few nature immersion activities. The tourist who is interested in ecotourism is conscious and willing to pay a higher price to ensure they do not have a negative impact on the earth's resources and people groups.

A model to look at is *&Beyond* in Africa. This luxury adventure and conservation organization was a forerunner in the industry when it started in 1990. They are renowned for their extremely knowledgeable and well trained professionals and guides. Many in the industry send their staff to receive training from *&Beyond*. They have always operated out of Africa but in 2005 formed a joint venture with India's Taj Hotels Resorts and Palaces to enable luxury tourists explore the wildlife and national parks there. For more information about *&Beyond's* sustainability tourism model, please see [http://www.andbeyond.com/sustainability\\_with\\_andbeyond](http://www.andbeyond.com/sustainability_with_andbeyond) .

Another model for Taiwan is Inkaterra in Peru. Their first lodge opened in 1975 before the term ecotourism even existed. Inkaterra's model (which has received loans from the United Nation Global Environment Facility) is committed to the following principles:

- Rescue Peruvian resources with respect and support for their diversity and culture.
- Conservation and scientific research achieved through self-supported sustainable tourism respecting authentic cultural, social and environmental values.
- Provide unique and proud Peruvian professionals a mean to build a career while cherishing their land.
- Finding Peruvian assets and converting them into world class products and services.
- Through travel experiences, create memories for visitors that will resonate in their soul.

Inkaterra purposely tries to attract a wider audience than *&Beyond* to include students and researchers because of their commitment to further understanding Peru's ecosystems for Peruvian pride and to sustain business revenues. To learn more about Inkaterra's sustainability commitments and policies, please see <http://www.inkaterra.com/en/about-us/sustainability-policy> .

A key factor in sustaining an ecotourism industry is dissemination of knowledge. Locals must be informed about how to best preserve the environment and be able to guide and tell tourists as well. Enforcing preservation can be difficult so it's best to rely on the market and try to align interests. If locals receive their means of living from ecotourism and not from industries that deplete natural resources, they will have an incentive to protect ecological wealth. Organized knowledge is also a revenue generator for the industry as tourists can purchase podcasts, guided tours, interactive DVDs, CDs, mobile apps and identification/checklist plates of flora, fauna, and local culture.

## LGBT Tourism

Word travels fast within the LGBT community and Taiwan recently (January 2013) made the front page of the New York Times online as possibly the first Asian nation to legalize gay marriage; and Taipei recently (October 2012) had 50,000 people attend their Pride Parade, making it Asia's largest. Asia has not been a hot spot for gay tourists or residents because being gay was classified as a mental illness until 2001 in China and other Asian countries have similar stories. Since this is still taboo, it may not be a market that Taiwan is keen to actively advertise themselves to, but as the international community may see Taiwan as more accepting and socially progressive, we should let the numbers speak. The Netherlands based Out Now Consulting projected global LGBT leisure tourism to



generate nearly \$165 billion in 2012. Taiwan has the reputation of having welcoming and warm people who may also welcome increased tourism revenues.

### **Wanted: A Professional Tourism Workforce**

An important obstacle in the growth and development of a robust tourist industry is the shortage of experienced and knowledgeable workers. While great tourist sites and friendliness is quite important, it is not by itself enough to create a thriving tourist industry in Taiwan. Tourist arrivals in Taiwan have almost doubled in the last 6 years. If the tourist industry continues to grow faster than the number of qualified workers, it will falter.

Although around 25,000 students graduate with tourism majors each year, only about 40% will go on to work in the field, mostly due to low pay and long, irregular working hours. According to Council of Labor statistics, entry-level hotel workers earn between \$25-30k monthly (US\$835-1000); new travel agent employees earn about \$23k per month (US\$765) for their first 5 years; while average monthly earnings for tour guides are \$34,800 (US\$1,160). Added to the low pay is the fact that working hours are often outside the mainstream job hours, putting stress on employee social life. The Lunar New Year is a great example of job related stress in this industry. Tradition was that this long holiday was for families to be together. However, the trend is moving towards families going out to restaurants and traveling during this holiday. This has made the Chinese Lunar holiday the busiest time of the year for restaurant and hotel workers. As more and more foreigners spend this time in Taiwan, more buses and tour guides are needed. While there are many jobs that require little skill or interaction with tourists, a growing and maturing industry brings a more diverse, wealthy, and more demanding clientele.

Although the workforce quality and quantity is improving, many of the top workers are being lured to places like Hong Kong, Singapore and Mainland China where their skills can earn them more money. A program established in 2010 by the Tourism bureau, which sponsors about 100 qualified applicants each year, has reaped good results, but more is needed. This program should be expanded and supported by local and central government funding, and high-quality training. In addition, students who major in tourism should be required to spend time at airports, the HSR stations, MRT stations, etc. armed with questionnaires and small gifts for those visitors who agree to fill out the surveys. Surveys should be created to reveal what visitors liked, didn't like, where they visited, best experience during the visit, and what they feel needs improvement. Airlines should also participate by offering free tickets that will be awarded to those who complete surveys who qualify for periodic prize drawings.

### **What Makes a Good Tourist Destination?**

Recently taken vacations in Vietnam and in Cambodia reveal some interesting thoughts. Vietnam has a GDP of \$123.96 billion with 6.84 million tourists visiting a year and Cambodia with a GDP of \$12.88 billion in GDP and 2 million tourists a year. Despite these statistics and my expectations, Cambodia presented a far better tourist experience than Vietnam. So what makes a good tourist experience?

A key ingredient is what someone learns on their trip. More and more people want to be able to go home and tell their friends something new about the foreign land they visited, not just the color of the sand on the beach. Unearthing a little-known fact helps to make for a better adventure. In Cambodia, they presented their history and culture in stories through audio tours, not through local tour guides cracking off-color jokes at Americans through broken English, as was sometimes the case in Vietnam.

First impressions are also vital and those are established at airports. Obtaining a visa at the airport in Vietnam involved going through a rather confusing process (with no English signage) whereby you hopefully will end up waiting for your visa. No one enjoys flying anymore, so you can only guess the atmosphere as more planes pulled in and more confused crowds gathered. An efficient and clear processing system, a welcoming face, and comprehensive city information do wonders for cranky tourists trying to begin their vacation. It should be noted that entry into Taiwan is not an unpleasant experience, but the lesson here is that the clearer and more efficient the visa process is handled, the less stressful entry is and the sooner tourists can feel that their vacation or business trip can begin.

Most importantly, many tourists are curious about the people in a country and their cuisine, not just buying souvenirs. In Vietnam I couldn't hold a conversation with someone for more than a minute without being asked if I wanted to purchase something. In Cambodia I was able to chat with people about what they were doing, their family, and, of course, the weather all before I figured out what I wanted to buy. When a tourist workforce is being trained, the wonderful Taiwanese way of small talk first should not be underestimated. The last thing people want to experience is a tourist trap environment. In this regard, Taiwanese friendliness and naturally open desire to be helpful will send the right impression and actually sell more in the end.

One final point with regards to tourism; visitors love experiencing lots of exotic and new foods, people, activities, scenery and culture. However, they will also begin to miss the familiarity and comforts of home. Therefore, it is quite important to have a suitable variety of international hotels, restaurants and shops to satisfy that homesickness that can make travelers dissatisfied at the end of their vacation. "It was ok, but I really began to miss some of the basics from home". It's much better to hear, "What a great time! And just when I really needed it, I found this awesome burger restaurant!"

## **FOREIGN DIRECT INVESTMENT**

### **Why Taiwan?**

**Thomas Friedman, famed author of "The World is Flat", once commented, "EVERY so often someone asks me: "What's your favorite country, other than your own?" I've always had the same answer: Taiwan. "Taiwan? Why Taiwan?" people ask. Very simple: Because Taiwan is a barren rock in a typhoon-laden sea with no natural resources to live off of — it even has to import sand and gravel from China for construction — yet it has the fourth-largest financial reserves in the world. Because rather than digging in the ground and mining whatever comes up, Taiwan has mined its 23 million people, their talent, energy and intelligence — men and women. I always tell my friends in Taiwan: "You're the luckiest people in the world. How did you get so lucky? You have no oil, no iron ore, no forests, no diamonds, no gold, just a few small deposits of coal and natural gas — and because of that you developed the habits and culture of honing your people's skills, which turns out to be the most valuable and only truly renewable resource in the world today. How did you get so lucky?"**

### **APCAC Coming to Taiwan for the First time in Twenty Years**

The 2013 Spring Conference of the Asia Pacific Council for American Chambers (APCAC) will take place in at the Grand Hyatt Taipei, on March 21-22<sup>nd</sup>. Senior-level executives and other dignitaries from Taiwan and throughout Asia, as well as the US, will come together for networking and in-depth discussion of key issues facing the multinational business community. Topics will include green energy, industry and buildings, how FTAs and RTAs are changing the economic landscape, healthcare for the 21<sup>st</sup> century, realigning regional supply chains, and fostering innovation and

creativity for the new era. Congratulations to the organizers and to AmCham Taipei, who will hold their annual Hsin Nien Fan dinner to coincide with the conference.

### **Taiwan Strengthens Trade Secret Act**

An amendment to the Trade Secret Acts passed in January, added regulations that include criminal liability and increased penalties in a bid to prevent leaks of trade secrets. Under the amendment, those who attempt to steal or disclose trade secrets for personal profit will be subject to as much as five years in prison and fines from NT\$1million to NT\$10million (US\$34,500-\$345,000). If found guilty of stealing or disclosing trade secrets to foreign countries, imprisonment can be up to 10 years and fines up to NT\$50million. If the gains exceed NT\$50million, financial penalties can be increased between 2 and 10 times, to be determined at the discretion of the court, according to the Intellectual Property Office (IPO). This represents another move from Taiwan to make for a more secure environment for doing business in and with Taiwan companies, which contributes to the already outstanding reputation Taiwan has worked so hard to achieve. As a result, Taiwan becomes a more competitive and attractive place to do business.

Southern Taiwan has a lot to offer multinational corporations as well as U.S. small businesses. To start, it's important to get head office employees or small business owners to visit southern Taiwan and see what the people and businesses offer. Southern Taiwan can capitalize on its competitive strengths and give business visitors specific projects and investment incentives, like product innovation or waived tariffs on imported setup inputs, for them to advocate for back at their home office. Everyone businessperson who visits southern Taiwan should walk away saying, "what they can offer is exactly in line with our needs."

It's not a secret that the diversification of economic links creates a strong financial economy that can absorb the impact of financial flows. Taiwan has healthy domestic demand-led growth that would be best when paired with diverse economic links.

### **Geographically Diversifying Economic Links**

It would be a good idea to look into diversifying economic links by pursuing business relations with expanding Asian nations like Mongolia and Burma. In 2012 Mongolia had the second-fastest growing economy in the world. Also in 2012 President Barack Obama made a historic trip to Burma and according to *The Economist's* "Investing in an Accelerating Asia?" 2013 outlook report, currently only 18.4% of those surveyed are heavily or moderately investing in Burma although 34.4% are watching and assessing.

In this same report, Burma and Taiwan garner equivalent lack of interest ("no plans to invest") from multinational companies-both sit at 30%. This may suggest that both Taiwan and Burma should not put all their eggs in the multinational corporation basket and that maybe they should give each other some eggs.

Iceland's membership in the European Economic Area was a component of their success in attracting foreign investment from the energy sector because most of the energy produced was being sold to the European market. East and Southeast Asia can hold similar benefits for Taiwan.

### **Make It Easy As 123**

As previously stated in AmCham white papers, it is vital to have the centralization in one government ministry of all the various regulations and applications that have to be completed by a

foreign company in order to start a business. This ministry should be in one office at one location and employ staff with excellent language and research capabilities. This office should strive to become the clearinghouse for investor information, with economic research and reports readily available. As the sole contact point between investors and the Taiwan government, this office could become successful in providing fast, reliable, and hassle-free access to a variety of services from telecommunication to banking. Representatives from local governments should also have a presence in this office in order to efficiently correlate information between potential investors and the local officials with central officials in the loop. Other countries, such as Bahrain and the UAE, have been successful in attracting investment by giving foreign companies the ability to obtain 100% ownership in some sectors and providing a clear regulatory framework similar to home country models. Improving the ease of foreign companies establishing their businesses in Taiwan will transfer new technology and know-how into the country and diversify the economy while providing jobs and stability.

### **Southern Taiwan as a Home for Foreigners**

It is vital for potential foreign investors to see southern Taiwan as a real home; a place they can enjoy living; a place their families can thrive.

Western management often views opportunity through the lens of their low-growth home markets and thus fails to recognize local opportunity. However, Western companies are realizing future growth areas are most likely in Asia, and thus are increasing the number of senior management posted in Asia. In 2008, 19% of Western firms had a member of their main board of directors in Asia; now there are 38%. By 2017 they expect to have 52%.

In southern Taiwan you can go from the beaches to the mountains within hours making Taiwan a place where accessibility is outstanding, no matter what leisure activities you like. What is also important is the travel time it takes for a foreigner to return to their home country. A businessperson doesn't want to move somewhere too far off the grid where missing their flight means they can't make it to their home country for an additional 24 hours. They also want their friends and family to have an easy time coming to visit them and not having to connect in five airports before arriving. Therefore efficient and convenient air transportation in and out of the region is very important.

The quality of life that a foreigner can have in southern Taiwan is also very important. It includes an international food scene, entertainment options, international schools, safety, and community life. Southern Taiwan has fantastic food, but could definitely improve their international food scene. It would be great to see more uniquely themed neighborhoods develop with a central place for nightlife. The Pop Music Center should become such a place when completed. Southern Taiwan's art scene organizes and advertises itself well. World-class exhibits come through and this connects foreigners with culture outside of Taiwan. As such, the Love River/harbor area will bring all of this together in a very convenient and eclectic mix of the arts and entertainment.

### **Come Back Home**

We have seen over the last decade that large collections of cheap labor can no longer be relied on as a business model. Companies are now looking to invest in technology for more sustainable growth. Southern Taiwan should seize this opportunity since about 70% of all overseas investment by Taiwanese companies still ends up in mainland China. That large amount of investment could begin to make its way back to Taiwan.

According to a recent "McKinsey on China" podcast there are 23 million people in Taiwan and 1.5 million of them are in China or actively traveling to and from China. Taiwan is the second or third

largest investor in China with \$100 billion officially with unofficial estimates around \$300-\$400 billion.

So how to bring investment back? The Taiwanese government made initiatives to attract some firms back to Taiwan, including meetings for Taiwanese businesses operating abroad, which have attracted around 400 attendees. One leading the way is Jinn Her with NT\$10 billion (US\$333.3 million) earmarked to build a facility in the Alian industrial park in Kaohsiung.

The Council for Economic Planning and Development launched a new program on November 1, 2012 that created a NT\$10 billion (US\$333.2 million) fund to provide low-interest loans to enterprises opening in Taiwan. The program, running through 2014, will also make setting up their new facility in Taiwan easier by reducing tariffs on machinery imported for the new facility. Companies participating in the program will also be able to hire 15%-20% more foreign works than previously, although it cannot exceed 40% of their total workforce. There are some stipulations. Within one year of local investment, they must have hired 100 Taiwanese employees, and enterprise must contribute their own funds to local projects of at least NT\$100 million (US\$3.3 million) for most sectors, while high-tech enterprises are held to NT\$500 million (US\$16.6 million). The program is geared toward Taiwanese international corporations that have their own brands and produce high value-added products.

This initiative is expected to generate NT\$200 billion (US\$6.7 billion) in investment and a total output value of NT\$303 billion (US\$10.1 billion). Additionally, it will create 82,000 jobs for local workers by end of 2017.

### **Trends Southern Taiwan Should Embrace:**

#### **Becoming an Asian Regional Hub**

Due to Asia's rapid development, some multinational companies are beginning to break up their regional Asia office into smaller regional hub offices. Traditional Asian hub cities are becoming very expensive due to high property prices and the cost of living. Their good international schools are also filling up and they are struggling with staffing. Southern Taiwan can easily alleviate some costs for companies although it should work more to develop sound international schools and an education system that produces an innovative workforce. Southern Taiwan should also continue work to make the south a more desirable place for foreigners to relocate with their families. In order to lure regional hub offices, southern Taiwan must strive to make itself convenient for travel, standardized in terms of international employment regulations and financial systems, and offer more international varieties in cuisine and brand names in shopping.

#### **Balance Clean Energy Development and Ecotourism - Communicate**

Taiwan should pursue both clean energy development and environmental sustainability together, in a dual pronged approach for developing ecotourism industry. Traditionally, as soon as an area is used for energy development, its value for tourism revenue declines. Developing clean energy can irreversibly change landscape if it comes with a large-scale negative visual impact. As Taiwan develops geothermal energy, it should look to alternatives from traditional boreholes, from which the emissions of sulfur and other minerals change the color of the power plant's surroundings. A lot of noise produced from traditional boreholes and other negative aspects tied to older geothermal technology suggest that the sites should be away from cities and in locations where people rarely go. However,

new technologies are being developed that will change Taiwan's ability to engage in geothermal and retain its natural splendor. Iceland serves as a model in these industries. It can also be noted that most jobs created in energy projects are connected to the construction phase although seasonal jobs created in the ecotourism industry are less stable, so a balance must be achieved. Additionally, there are a lot of variable factors involved in developing tourism, which spread across ministries and companies, and can be hard to coordinate or control. The power industry shouldn't have to worry if it could develop new facilities in an area and the ecotourism industry shouldn't have to worry about the energy industry's impact on an area. When developing energy and ecotourism projects in southern Taiwan, it is vital for industries, residents and government to communicate, coordinate, and cooperate while considering environmental social and economic values of all relevant stakeholders.

### **DRUNK DRIVING**

With southern Taiwan striving to grow its tourism trade, increase foreign investment and relocation to the area, and generally raise the quality of life in the south, it must do everything possible to make road safety a priority. It is good to see the central government taking stronger measures to improve road safety. Let Kaohsiung lead the way in its enforcement. On January 14<sup>th</sup>, 2013, Taiwan's legislature adopted amendments to the Road Traffic Management and Penalty Act that increase penalties for driving under the influence of alcohol or drugs. Under the amended law, the maximum fine for driving under the influence is raised 50% to NTD\$90,000 (US\$3,113). A second offense within five years will automatically incur the maximum fine. Drivers who fail to stop at a police checkpoint for a sobriety test will be subject to the \$90k fine, have their vehicles impounded and driver's licenses suspended, and be required to attend classes on driver safety. With taxis easily available, improvements in the MRT and bus routes, and construction of the light rail and Rapid Bus system, alternative transportation home should be convenient and affordable. Nightclubs and pubs should consider offering free soft drinks to designated drivers as a further community service. As an additional deterrent of drunk driving, anyone who finds themselves under the influence, with their vehicle parked nearby, might be offered a pass that would provide two benefits: a reduced maximum parking fee and 2 discount taxi coupons (one to get home and the other to use the next day to get back to their vehicle).

### **TOBACCO**

The following information was received as part of our ongoing research into business in southern Taiwan. AmCham Kaohsiung has included this topic to reflect one of Taiwan's many industries that has a widespread impact. The subject of tobacco is becoming less politically correct as pressures increase from various groups. However, this is one of the more complex topics as it includes unpopular activities, health issues, taxes, and economic impact. Regardless of where you stand, this topic will affect you.

#### **Moderate and Regular Increases in Cigarette Taxes**

The tobacco industry supports a policy of moderate and regular tax increases that would assist the government in achieving its public health and revenue collection objectives without causing the growth of illicit trade.

Singapore and Malaysia demonstrate both the adverse consequences of an unbalanced approach to tobacco taxation and how subsequent government measures can help rectify the situation. Since 2005, Singapore has frozen taxes on cigarettes following consecutive steep tax increases that led to illicit cigarettes taking an estimated 25% share

of the market. A strong focus on enforcement curbed the growth of the illicit trade and helped the legal market recover. However, the illicit trade volume in 2011 was still significant compared to the years prior to the steep tax increases. Malaysia was faced with a 36% market share for illicit cigarettes after repeated tax increases that totaled almost 10 times the rate of inflation. This year, the government decided to refrain from further increasing the excise tax and instead stepped up enforcement. There are clear signs that this change in policy is starting to pay off through an improvement in cigarette tax revenue.

In 2002, Taiwan introduced a Health Surtax of NT\$5 per pack on top of the excise tax of NT\$11.80. Since 2006, the Health Surtax has been increased by 300% to the current level of NT\$20. There are strong indications that this policy of steep increases has unintentionally fueled illicit trade and resulted in lost tobacco tax revenue and damage to the legitimate tobacco business.

According to a survey conducted in 2011 by an independent research organization on behalf of the Tobacco Institute of the Republic of China, duty free products accounted for 4.7% of Taiwan's cigarette market and 5.6% were so-called "cheap white" products. Most of the "cheap whites" are illegal products entering the border without domestic duty paid-concealed among lawful imports. The survey shows that the market share of smuggled "whites" increased from 5.2% in 2010 to 5.6% in 2011. The government has acknowledged that the sharp increases of the Health Surtax have inadvertently spurred sales of unregulated and untaxed "whites."

In the interest of meeting the government's revenue and public-health objectives, we recommend that the government take an unbiased and comprehensive look at all the facts when considering action related to the tobacco industry:

- (a) Take the potential impact on the illicit trade into account when considering any change in the level of the tobacco tax;
- (b) Consider adopting a policy of moderate and phased tax increases that draw on inflation rates for reference;
- (c) Intensify enforcement efforts and increase the penalties for engaging in the illicit trade, including heavier penalties for inbound travelers who carry duty-free tobacco products beyond the legal limit into Taiwan; and
- (d) Engage in comprehensive communication with all stakeholders so as to avoid adopting ineffective measures in an effort to combat the illicit trade

### **Stress Enforcement Not New Amendments**

Frequent proposals for amending the Tobacco Hazards Prevention and Control Act (THPCA) have created uncertainties in the tobacco retail trade's business environment.

In 2011, proposed revisions included such requirements as oversized graphic health warnings, plain packaging, a total ban on point-of-sale displays, and a complete ban on flavor additives. While there is no reliable evidence that the proposed steps would help the government reduce smoking consumption, there is concern that these proposed

measures could have negative unintended consequences in fostering illicit trade in cigarettes, impeding competition, and depriving tobacco manufacturers of their legitimate intellectual property rights, thereby hampering the legitimate tobacco business and retail trade.

Before considering new regulations, especially when they would pose any legal or financial risks, the authorities should ensure that the existing regulations are being adequately enforced. The Australian government, for example, moved rapidly to impose an unproven plain-packaging policy and now finds itself fighting challenges from manufacturers in the Australian High Court, international investment arbitration forums, and separate international trade challenges from WTO member states. The outcome could be both politically and financially damaging.

To achieve its public health objectives without creating unintended negative consequences, the government should:

- (a) Ensure that existing laws and regulations are interpreted and enforced in a consistent manner;
- (b) Before introducing any new regulatory measures, engage in comprehensive dialogue with all stakeholders, and consider reasonable alternatives (such as sustained educational campaigns) that have already been proven effective in other markets, and
- (c) Ensure that any new regulatory measures are evidence-based.



## **KAOHSIUNG**

Kaohsiung has gone through so many changes. It was at one time *the* economic engine of Taiwan. Most of the island's success was due in large part to the massive manufacturing done here. But times changed as they always do. Foreign and Taiwan businesses began leaving Taiwan for the promise of cheap labor elsewhere. For many, this meant relocating to Mainland China. After years of working there, 40% of US firms are ready to call it quits, and many Taiwanese are looking to come home again. The promise of cheap labor has disappeared as costs rise on the mainland. Problems with ever-changing and unclear regulations have been a constant source of frustration, and the overall lack of respect for intellectual property has cost billions in lost revenue and profits. Many now look to Thailand, Vietnam, Indonesia, and other developing Asian nations as the next best cheap manufacturing mecca. Maybe they are. However, some very important lessons have been learned. Focusing only on labor costs can be quite misleading. Other factors must be seriously considered. When Rhythm & Hues decided to expand by opening a new facility in Kaohsiung, it was the local talent pool that made the difference.

Kaohsiung has been persevering through a difficult transition from heavy industry manufacturing to high-tech, high value, environment-friendly manufacturing, and a relatively new tourism and service industry that is seeing a city with more frequent blue skies, lots of bicycle paths, good quality of living and a still reasonable cost of living. Kaohsiung is becoming a real metropolis, more international, more interesting, more fun and more robust in its variety of industries. All this has happened despite a number of crises, domestic and global, economic and forces of nature. There is still a lot of work to be done, but the foundation is set, projects are getting done, plans are coming together, and the city is evolving. What will happen here during the next few years will make this second largest city in Taiwan, nothing less than spectacular! This might just be the beginning of Kaohsiung's best era!

Important Kaohsiung Numbers; Population: 2.77 M; Metro System: 64.8 Km; Bus Routes: 164 lines  
Ridership of Public Transit; 81 M (Jan.-Oct., 2012)

### **Kaohsiung to Host 2013 Asia Pacific Cities Summit**

Kaohsiung will be hosting the biennial Asia Pacific Cities Summit (APCS), to be held from the 9<sup>th</sup> to 11<sup>th</sup> of September 2013. APCS has been an initiative of the Brisbane City Council since 1996 and attracts delegates from over 100 cities. Past events have been held in Seattle, USA, Chongqing China, Incheon and other key cities in the Asia Pacific. In recent years, Kaohsiung has actively participated in hosting international conventions in order to enhance its international visibility and brand image. The City government was awarded the honor of hosting the 2013 edition of the Summit in the face of stiff competition from other bidding finalists Daejeon, Korea and Kunming, China. Speaking at the announcement of the Summit, the mayor of Brisbane, Graham Quirk, mentioned the 15-year sister city relationship between Brisbane and Kaohsiung while expressing confidence in Mayor Chen Chu and her teams, to successfully host the 2013 APCS and strengthen both cities' friendly relationships with other world cities. Kaohsiung Mayor Chen Chu also expects that the experience of hosting such a prestigious event as the APCS will provide an important boost of energy and knowledge management for further and more diversified international prospects.

Themed "Reshaping the Urbanomics of Cities - City Challenges, City Solutions," the City has invited Lord Sebastian Coe, the chair and chief architect of the London 2012 Olympic Games as a high profile keynote speaker, to share the successful experience of the seeing derelict inner city areas regenerated by the Olympics project in London.

Mayor Chen Chu also commits the 2013 APCS to continue the award winning energy conscious and environmental protective legacy passed on from the 2009 World Games. In addition to having a green

MICE powered paperless convention, the Kaohsiung government also has other ambitious plans to reduce the carbon footprint of the convention itself.

### **ICLEI**

Kaohsiung is part of the ICLEI (International Council for Local Environmental Initiatives), and opened an ICLEI training center in Kaohsiung in September 2012. The Kaohsiung city government in southern Taiwan proposed an action plan on the protection of city climates at a recent global meeting, receiving widespread recognition, a city official said in December 2012.

It marked the first time that a plan proposed by a local government in Taiwan to combat global warming had been recognized by the international community, said Hsiao Yu-cheng, head of the port city's Environmental Protection Bureau. The remarks came after Hsiao led a delegation that attended the 13th Session of the Conference of the Parties to the United Nations Framework Convention on Climate Change (UNFCCC) held in Bali, Indonesia, Dec. 8-11, 2012. The Taiwanese officials took part in the conference not as UNFCCC members but as members of the International Council for Local Environmental Initiatives (ICLEI).

Kaohsiung City joined the ICLEI in 2006, making it Taiwan's first city to become an ICLEI member. Established in 1990, the ICLEI is composed of 715 local governments in 67 countries and is aimed at encouraging local governments to engage in the reduction of greenhouse gas emissions. Over the years, the ICLEI has initiated many campaigns and programs to help local governments seek sustainable development, earning the organization widespread acclaim.

The conference adopted the port city's action plan to implement the ICLEI's Cities for Climate Protection (CCP) program to the ICLEI Secretariat.

### **Rhythm & Hues Studios new home - Kaohsiung**

Rhythm & Hues is a multiple Academy Award®-winning film production studio specializing in visual effects and computer animation for feature films and television commercials.

Founded in 1987, Rhythm & Hues has been singled out as a leader by virtually all the major competitions that recognize excellence in computer graphics. Continuing to push the boundaries of the digital frontier, Headquartered in Los Angeles, Rhythm & Hues has a globally distributed production infrastructure with additional studios in India, Malaysia and Vancouver, Canada. Rhythm & Hues' new facility in Kaohsiung began operations at the end of 2012. The Kaohsiung facility will be an extension of the studio's global production infrastructure and work on all of the same projects - to the same high quality standards. Taiwan's high-quality labor force, modern infrastructure and quality of life were the three main reasons why Rhythm & Hues Studios decided to open a visual effects studio in southern Taiwan. "From our point of view, Taiwan has a number of things that are indispensable, which must be there for us to create a facility," said John Hughes, president and founder of R&H, one of the world's top 5 visual effects studios. This project represents a combined investment of \$42million and included Taiwan government incentives; will import 50 technical professionals to train around 600 local staff over 3 years and hire about 200 of them to work on Hollywood films.

### **Play ball!**

Local business leader Lin I-Shou (E-United Group) recently purchased a baseball team, the former Sinon Bulls; now the EDA Rhinos. By doing this, he has done southern Taiwan and Taiwan's Chinese Professional Baseball League (CPBL) a tremendous service. Without the Bulls, professional baseball in Taiwan might very well have died. This will not be the case. In fact, Mr. Lin has stated his intention to put some money into the team, contracting well-known players and striving to raise the level of the

sport here in Taiwan. The team's new home will be the same stadium that recently hosted both the American Major League All-Stars and previously the L.A. Dodgers in Kaohsiung. Already showing ambitions to compete for top honors this season, EDA Rhinos has signed the current top CPBL draft pick - Hu Chin-Lung, former LA Dodgers and New York Mets shortstop, to an NT\$ 14.7 million two-year contract. Fans and CPBL officials are applauding the franchise sale deal, saying E-United Group and its new team can be expected to revitalize local support and passion for pro baseball in the island's southern regions. Mr. Lin wants to utilize two baseball fields, the main stadium that has already seen visits by MLB players at Chengqing Lake, and one as a training center located adjacent to Love River on Shizhoung Rd. Three cheers for Mr. Lin. He really hit a home run! Let's be sure to invite the MLB to return again and often, including starting the 2014 season here.

### **The New Kaohsiung Port Terminal**

New York based practice Reiser and Umemoto has been awarded first prize in the international design competition for the Kaohsiung Port and Cruise Service Center, which will feature an elevated pedestrian pathway along the waterfront while focusing on taking advantage of the location to maximize the interface between water and land. The boardwalk, which is connected to the terminal along three different points, will link the new pop music center, the arts and shopping districts within a chain of green spots along the waterfront. This project is scheduled to be operational in 2014. This organic and quite striking facility will draw travelers and sightseers to the area, and help to create numerous jobs.

### **A new era in commerce for Kaohsiung!**

May of 2014 will bring with it perhaps the most important event in modern times for Kaohsiung; the 2014 International Boat Show. This event is quite special for a number of reasons. It will herald the completion of two major development projects; the Yacht Manufacturing Center and the new International Convention and Exhibition Center (both scheduled for completion by the end of 2013). While the 2009 World Games was also a milestone event for Kaohsiung, its focus was on friendly sports competition and exchanges in culture. The 2014 Boat Show is Commerce! This will be a world-class event with up to 1500 vendors both indoor and outside the Center which sits at the edge of Kaohsiung Harbor. An amazing opportunity for sure; an intense challenge without a doubt; most certainly a new page in Kaohsiung's efforts to expand its role as a top player in world trade. With help from Miami (one of Kaohsiung's Sister Cities), the city is pulling out all stops to make this event a spectacular success. Not only will this lead to increased awareness and sales for Taiwan's excellent yacht manufacturers, and help nurture local yacht ownership and charter industry, but also serve as the foundation for future world-class exhibitions at the new Center. Now is the time to coordinate, organize and plan for the city and yachting industry. Traffic, hotels, flights, restaurants and activities need to be assessed, improved and streamlined. Exhibitors need to be confirmed, presentations polished, training in English guides and hosts need to be accomplished. Clear multilingual signage needs to be put in place all around the city. Shuttle bus and MRT transportation needs to be well organized and ready for the thousands of visitors and business people who will attend as buyer and sellers. New tourist information brochures and kiosks need to be finalized and located throughout the city; at the airport, harbor, MRT stations, HSR station, hotels, shopping centers etc. An updated and comprehensive listing of restaurants, night spots, cultural attractions and activities needs to be put into easy to read, easy to navigate, and easy to get formats. The event organizers should create an app for Android, iOS and Windows platforms in Mandarin, English and Japanese to give visitors all the information they need at their fingertips, including a map of the exhibitors and related information to make it easy to find everything easily and efficiently. This will also cut down on the need to trilingual guides. The city should also develop an app for Android, iOS and Windows mobile formats, so it can be downloaded and accessed online by everyone on their smartphones, tablets and notebooks. This will take time, but the potential return is worth the effort. Once it is in place, the future of tourism here will be better served. These apps should be available with Traditional and

Simplified Chinese, English and Japanese. Incorporate Google maps, all manner of information for shopping, eating, relaxing and adventure along with hotel information that can be accessed with a simple touch. Make online reservations and ticket purchases possible too. Kaohsiung, this is your moment to shine so be prepared. Potential new partners and investors, international business leaders, and big ticket item buyers will be descending on the city for this exhibition. Don't disappoint them! Give them an experience they will eagerly share with others. Also, don't underestimate the tourist aspect of this exhibition either, as visitors to this event are potential future tourists who might just bring their families here on vacation. While on the subject of creating apps, now is also the time for a coordinated effort by neighboring Tainan and Pingtung to create their own, so as to make available to visitors, foreign residents and Taiwanese alike, all the vast richness of southern Taiwan.

### **Asia's Next Bay Area**

Asia's Next Bay Area will be realized through the redevelopment of the Kaohsiung's Old Harbor. Primary objectives would be to re-invest in low-intensity or unused land zones within the Old Harbor. Urban development would include establishment of major public transit and infrastructure systems such as Kaohsiung Port Terminal, Maritime Cultural & Popular Music Center, Kaohsiung Exhibition and Convention Center, Kaohsiung Public Library and Kaohsiung Light Rail Circuit. Coastal regions will be modeled to give refreshing appearances consistent with the area's green outdoor image, and to accelerate the development of multi-functional commercial zones nearby. Kaohsiung shall emerge as Asia's newest bay area metropolis with integrated tourist, commercial, and cultural functions.

Kaohsiung's City Government has designated the harbor bay area as the city's multi-functional trade district in order to improve land utilization for zones unsuitable for industrial use and to redevelop and transform the traditional export processing model of the Port of Kaohsiung. New functions were planned to fulfill the new harbor's roles as a manufacturing center and maritime logistics and services hub in the Asia-Pacific region.

### **World Trade Center – Exhibition & Convention Center**

This exhibition and convention center is planned to have 1,500 exhibit stalls, a 2,000 person conference room, two 800 person conference rooms, four small conference rooms for 40 persons, six mini conference rooms for 20 persons, with attached amenities and outdoors exhibit areas. Project completion is scheduled for December 2013. This project will allow Kaohsiung to function as a global logistics center and improve her image as a competitive international maritime and air transport metropolis, expand domestic and international markets for local industries, create trade opportunities, and promote regional economic transformation. The project would accelerate the development of exhibition, tourism, and commercial services to create prosperity. In addition to the International Boat Show, twelve likely candidates for successful annual events include an International Auto Show, International Computer Show, Mobile Technology Exhibition, Computer Gaming, Automotive Aftermarket Show (similar to the SEMA show held annually in Las Vegas), Outdoor Activities Exhibition, Watersports, Travel and Tourism Exhibition, Clean Energy, International Cuisine and Cooking Equipment (similar to the FHA in Singapore), and an annual Gateway to Asia Business Convention.

### **Maritime Cultural & Popular Music Center**

The Maritime Cultural & Popular Music Center (MCPMC) is located between wharfs 11 and 15 of the port of Kaohsiung, and covers an area of 11.49 ha. Plans include a large outdoor performance plaza, indoor performance halls, small popular music live performance houses, marine plaza, maritime cultural exhibit center, music themed restaurant, a pop music industry development center as well as related and supportive commercial facilities. The project was approved by the Executive Yuan on

October 1st, 2009 and was provided with a total construction budget of 5 billion NTD. Expected completion is at the end of 2015.

On January 18th, 2011 an international competition was held to select the best design and architectural consultant. Spanish architectural firm Manuel Alvarez-Monteserin Lohaz and Taiwanese Habitech Architects won the final bid. Design and supervision contracts were signed on April 22nd, 2011 and preliminary design reports were approved on September 6th, 2011. The Public Construction Commission had approved 30% of the basic design blueprints on May 23rd, 2012. The Ministry of Culture transferred the resulting documents to the city government for subsequent processing. The Executive Yuan also approved MCPMC land-use proposals and will be carrying out land-use transfers with relevant management agencies. Environmental impact assessments as well as urban design committee evaluations have been completed. Project construction contracts would be provided to begin actual work sometime between July and September 2013. Scheduled project completion will be the end of 2015. Basic and detailed design processes were continued in tandem with activity scheduling and implementation to help train professionals and support the popular music industry.

**A summary of the facility:** Six Live Houses would be constructed along wharfs 13 & 14. The facilities would provide venues for indoor live performances. The seaward face can also be used as an outdoor performance venue while the landward side would be a street artist plaza.

The design of the cultural zone was inspired by dolphins. A total of five structures were designed in a ring formation around the center. The two western-most blocks act as a bridge spanning the Love River and will become a large scale landmark of Kaohsiung and a major tourist attraction. Bidding for the cultural zone would select industries with management potential in order to strengthen the city's cultural features and attract a fixed crowd even if no performances are scheduled.

The Marine Plaza includes a variety of exhibition and vendor units, with transport capabilities all integrated with well-ventilated, comfortable, and modern designs. The plaza would be located at the central hub of the entire venue and act as the Center's gateway. The marine exhibit would be located within the marine plaza. Visitors could enjoy watching incoming ships and view the entire plaza. The hanging corridors at the 2nd and 3rd floors would allow direct on-board visits to docked ships. The main purpose of the exhibit would be to provide a space to showcase marine culture, history, industry, and social life.

The primary purpose of the transit terminal would be to support river and civil marine transportation in the harbor district. It would provide a venue for visitors to purchase tickets and wait for vessel boarding.

The large indoor performance hall would be situated at wharf 12. The stage was designed with flexibility to provide for multiple functions to satisfy every performance type and need. Seats and standing spaces would have a maximum capacity of 5,533 people, thus creating the first performance hall in southern Taiwan capable of holding 3,500-6,000 individuals. Rehearsal spaces, workshops, and training centers are also planned at the rear and peripheral areas of the hall.

The large outdoor performance plaza will be situated at wharf 11 and include a large canopy, outdoor stage, plus outdoor observation platforms. The plaza would be able to hold 12,000 spectators. Standing areas around the performance plaza would allow additional audiences. This outdoor plaza includes two towers. Tower 1 at the north side will be about 85 m high. Current plans include popular music exhibits, operation center, live house, music training center, backstage area, auxiliary spaces as well as a top floor scenic restaurant. Tower 2 at the south side (rear of the stage) would be about 55 m high. It would also provide additional audio and lighting support for outdoor

performances, and include a training area, backstage area and auxiliary spaces. The towers would provide facilities for the large canopy shed, performance stage, rear panels as well as lighting and audio controls. Large LED panels could also be installed on the external faces of Towers 1 and 2 (similar to the Taipei Arena). During performances, the LED panels would help improve visual effects. External spaces can also be leased for advertisements.

### **Harbor Development**

Kaohsiung Harbor is run by Taiwan Harbor Corporation, not the city government.

### **Southern Star Project**

The Southern Star Project is expected to boost jobs (both in short-term construction and long-term permanent positions), benefit local yacht manufacturing by streamlining logistics, boost harbor business through more efficient cargo transfer, increase yacht related tourism, and help solidify and expand financial support opportunities for the port. Kaohsiung Harbor's main competition is Singapore or Hong Kong. However recent pressure in Hong Kong regarding pollution from the shipping and cruise industries puts it at a disadvantage while Singapore is an expensive location for harbor related business and has virtually no local manufacturing. The Yacht Manufacturing Center (about 46.64 hectares) is expected to be completed in December 2013. It also includes a second section (\$4 billion Container Service Center) that is about 66.46 hectares. The entire project will be completed in Aug 2016. After development, it will include 28 yacht-manufacturing blocks (each about 2 hectares) and yacht industry related manufacturing will have 14 blocks (each approximately 0.5 hectares). It is estimated that yacht manufacturing and related industries will have invested about NT\$50 billion in construction with an estimated annual turnover of NT \$100 billion and at least 4,000 jobs created.

### **Cruise Homeport Development Indicators**

- From June 22, 2010 to June 27, 2010 the Economic Development Bureau and the Department of Transportation jointly organized delegations to visit Shanghai and Suzhou to participate in "2010 Asia Cruise Assembly". These two departments not only emphasized their determination to develop the cruise industry but also expressed hopes to work with related ports in order to establish mutual cruise homeports and nurture economic development of the cruise industry here.
- On September 30, 2011 the city held "Kaohsiung Cruise and Passenger Ships Industry International Conference". The city also invited representatives from domestic and foreign shipping industries in order to discuss the infrastructure required for developing the cruise industry and promoting Kaohsiung to a homeport.
- In October 2011, The Economic Development Bureau and Kaohsiung Cruise and Passenger Ships Industry Development Association jointly organized delegations to visit Tianjin for "The Sixth China Cruise Industry Development Conference". By doing so the city hopes to develop an "around the island cruise line" and also a cross-strait ferry cruise to compliment the international / cross-strait cruise line.
- In February 2012, Mayor Chen Chu led a delegation to the U.S. city of Miami and was accompanied by representatives from the Kaohsiung Harbor Bureau (now known as the Port Co., Ltd. in Taiwan - Kaohsiung Harbor Branch) to form an alliance with the Miami Port Authority, who witnessed a signing ceremony between the two sister ports.
- On August 20, 2012, Kaohsiung not only promoted the establishment of "Kaohsiung Cruise and Passenger Ships Industry Development Association" but also organized cruise industry forums and attended international cruise conferences. In order to fully market the Kaohsiung cruise industry, the city is strengthening communications with global cruise ship companies, and hopes major cruise ship lines will be able to use Kaohsiung as a port of call.
- On August 31, 2012, The Economic Development Bureau jointly helped Kaohsiung Cruise and Passenger Ships Industry Development Association hold the "2014 Cruise Industry

Development Conference” in the Splendor Kaohsiung Hotel. The Port Co., Ltd.’s Kaohsiung Harbor Branch hopes to enhance the level of passenger service at ports, to create a new image as a maritime gateway, and to promote the development of the cruise industry. The Executive Yuan approved the Kaohsiung Harbor Passenger Area construction projects, and scheduled piers 19-20 for construction; the main purpose is to have a port combination of a modern International Travelers Services Building. The construction began in February 2013, and is scheduled for completion at the end of 2014.

### **The Nanxing Free Trade Harbor District Project**

The objective of the Nanxing Free Trade Harbor District Project is to integrate harbor side industries. The project is expected to attract investments of over 10 billion dollars and initiate commercial development and employment opportunities in southern Kaohsiung. Taiwan International Ports Corporation, LTD. and the Ministry of Transportation and Communications (MOTC) will develop logistics, storage, green energy, downstream assembly and other harbor-side industries. At the same time, project development is committed to the protection of local ecology and recreational privileges of local residents. A coastal park reserve and waterfowl habitat covering 10 hectares shall be preserved. Industries to be established in the region must be non-polluting. The area to the north of Zhonglin Road was proposed as the Nanxing Free Trade Harbor District, while a yachting zone would be established by the Marine Bureau of the city government in areas south of Zhonglin Road. In order to expand the free trade zone, this city government had agreed to provide the Nanxing short-term project with 48.32ha of land in March 2010. In March 2011 another 50ha of land was granted to port of Kaohsiung and MOTC, to develop the harbor-side free trade zone. On September 20th, 2012, the Construction and Planning Agency of Kaohsiung City Government approved the Nanxing Free Trade Harbor District Project.

The Xingda Harbor was opened on November 14th, 2012. The city has been conducting comprehensive evaluations of Xingda Harbor including assessments of the Ocean Tour Marina, general development of Qieding Wetlands and the project’s impact on local residents. Commercial areas were increased while preserving ecological wetlands to respectively satisfy local economic development needs and ecological conservation. To provide employment opportunities and develop ecological tourism potential in Qieding, 24.0 hectares (ha) shall be provided as a special industrial zone, 13.6 ha for tourism and recreational purposes, 10.9 ha for commercial use, 27.7 ha for level B industries and 148 ha for ecological parks. Basic construction and industrial bidding for this and the Nanxing Project would be scheduled for completion by the end of 2014, and provide over 6,000 jobs for Kaohsiung.

### **Airport**

Talks are underway with Hawaiian Airlines about launching direct service to/from Honolulu. **This is one of the most significant issues in this year’s White Paper because much of our insight and recommendations come down to airline lift in/out of Kaohsiung International Airport (KHH).** Hawaiian Airlines consistently ranks as one of the world’s finest airlines and they are in a **MAJOR** expansion mode in Asia, so **Kaohsiung must seize the day.** Attract direct KHH air service to/from the United States and everything else has a chance. Kaohsiung remains a hampered international city as long as layovers in Taipei/Tokyo/Seoul/Hong Kong remain mandatory to reach the United States. The largest clusters of Taiwanese people in the U.S. are in L.A., San Francisco, Houston, and N.Y., so flights to/from Kaohsiung to these US cities should be aggressively courted. KHH is also known locally as Xiaogang Airport. This is confusing for some who think there are two airports here. KHH suffers from only 60% utilization due to noise restriction by nearby residents and a short runway. Out of the 554 weekly flights from China, only 52 are to Kaohsiung. Airport development includes looking for foreign companies to partner as a BOT or to invest in an all new, or significantly, improved airport. Airport Chairman Mr. Zhu is looking for a USD\$20 million investment to make this happen.

Since international airports today are designed to comfortably entertain travelers for at least 2 hours before their flight, greater emphasis on terminal décor, design, shopping, dining, traveler services and relaxing are all needed.

The Kaohsiung City International Airport looks to become a future aerotropolis. Civil Aviation Authority has researched Taiwan civil airports in overall planning for the next five-year development plan (including reviewing and functional positioning for the southern international airport).

The relevant aerotropolis planning draws on the experience from foreign countries, mainly those having sufficient passenger and cargo traffic. Hong Kong, Incheon, Schiphol and Dubai Airport each have annual passenger volume of more than 20 million people and more than 1 million tons of cargo. In addition, establishing a successful aerotropolis must consist of sufficient flight routes, convenient air transport distribution, and attractive logistics for incoming industries.

KHH is within the city, which has long been a mature harbor and intensive industrial area. After years of city development projects, its airport, harbor, and surrounding areas are conforming to a modern trading city prototype. Development towards this prototype drives the growth of sea and air transport.

This facility capacity can still meet demand until 2035, with plans to improve KHH in order to maintain operational requirements. The improvements include the terminal building renovation and waterproofing, terminal building air conditioning upgrades, replacement of international terminal departure check-in counters, etc.

One key feature that must not be overlooked here is to ensure that world-class shopping and dining is integrated into future airport development. With enhanced security requirements, more passenger time at the terminal will be needed. They will need food and shopping to help pass the time. They will need the most efficient counter service possible. They will need and love a healthy dose of southern Taiwan hospitality! Now is also the time to enlist the services of tourism students to survey passengers at the terminals while they wait for their flights; to get their feedback and comments on the southern Taiwan experience. Offer a small gift to those travelers who participate, possibly even getting the airlines to sponsor monthly prizes of airline tickets to go to one or two lucky persons. Virtually every country in the world looking to improve and expand their tourist industry does this. In order to best compete, we need to clearly understand what our customers need, want, and expect.

**Airport Upgrade Project: Progress:** This was a flight safety improvement project proposed by KHH under the Civil Aeronautics Administration, MOTC, in accordance to ICAO regulations (the addendum of Article 14 of Conventional on International Civil Aviation required that an area 150m on either side of the runway mid-line must be cleared). The proposal was evaluated and passed on November 13th, 2012, and shall be implemented after approval from the Ministry of the Interior. Construction of airport fences and airport facility height restrictions were also considered. Urban planning was amended to help with subsequent payments. The project shall cover an area of 24.63 hectares.

### **The Jiantai Project**

Zuoying Station is an interchange of three rail transit systems and Jiantai Company has plans to develop the peripheral area. They will introduce residential, commercial, and service functions to further improve the growing commerce activity in the area. 3.79 ha of residential land and 2.32 ha of commercial districts were planned. Evaluations of major project proposals were completed in July 2011 and the details were approved by the Kaohsiung Urban Planning Commission on March 19, 2012.



### **Kaohsiung City Main Library Construction Project**

The impressive Kaohsiung Main Library project was given a budget of 1.5 billion NTD and will be a first rate library for Kaohsiung residents. The project would cover about 2 ha and the 8 floors will provide a total floor space of 37,119 m<sup>2</sup>. Service procurement for project management technical services was initiated in February 2010 and granted to Malone Chang Architect. Through a two-stage selection process, the international design competition winner was chosen in February 2011: *Library in the Forest and the Tree in the Library*. Construction formally began on October 15th, 2012 and will be completed and opened for operation at the end of 2014. It will house a collection of 500,000 books although a program has been initiated to obtain one million books through donations.

#### *The Design*

Ricky Liu, after his collaboration with Ito Toyo for the Kaohsiung National Stadium, continues to implement his green architectural approach for the library with simple and transparent designs integrating the concept of suspension bridges. An enormous courtyard was designed in the middle of the building at the 6th floor. This would provide a green, tranquil environment and introduce large amounts of natural lighting to help save energy. Outdoor gardens would improve air ventilation, promoting indoor air movement and achieve natural circulation. When outdoor temperatures are below 26°C, central air-conditioning would be switched off to conserve electricity and provide a comfortable reading environment. Five meter wide balconies facing the thick forests were designed at the western and southern sides. The wood shall provide shade from direct midday and afternoon sunlight while acting as a noise buffer to create an excellent and natural reading environment. For reader spaces, minimalist spatial designs were used. Flexible compartmentalization of the library would be an indispensable element for functional manipulation of indoor spaces. Structural service cores were built only at the four corners of the 67.2mx67.2m large floor panel. Suspension of floor panels allowed traditional support pillars to be replaced with steel rods. This greatly improved penetrability and functional flexibility of the internal spaces as well as usable area. The design team also considered the library as a venue for hosting activities for large crowds. A huge main corridor 2-story high (about 8.4m) was designed to provide unobstructed visual and movement line and shelter visitors from sun and rain.

#### *Suggestions*

The library should also consider stocking a large selection of books in English and Japanese in order to attract more foreign investment and talent to the workforce. Foreign language books in Chinese, English and Japanese should be available based on international bestseller lists and local demand. In addition, an e-book program should be established to allow for temporary "borrowing" of books by individuals with identification cards or resident certificates. Registration for the e-book program should be available either online or in person, with first time borrowing requiring a visit to the library in person. E-books do not deteriorate over time or suffer from ill-use, weather, temperature and humidity. Therefore once in the library's system, they will remain available indefinitely. An e-book program can also be utilized in concert with local schools in order to provide a broader base of material for research and education projects. E-books should also be available in English and Japanese.

## **Education**

AmCham K would like to take the opportunity to give the great people at Kaohsiung American School (KAS) and Morrison Academy kudos for the very high quality of education they offer and also recognition and kudos to Mayor Chen Chu for supporting these international schools. KAS, under Dr. Tom Farrell's watch, has established an impressive track record in placing its graduates into top Universities. Morrison Academy announced it will expand to include high school curriculum in its Kaohsiung campus. Quality, targeted education is perhaps the primary means of assuring a successful and robust future. Continue expanding communication, cooperation and commitment between government and academia, with close input from industry and commerce so the workforce of tomorrow can be best trained today.

The city is implementing measures for fair resource distribution of adaptive learning, community educational resources for vocational high schools, online job fairs, expand vocational high school Pro-Learning Project for exam-free school admissions, improve technical education, and establish industrial-academia cooperatives.

The "Right to Education Network" was implemented to ensure the educational rights of underprivileged students. Ministry of Education policies of mandatory 12-year education were implemented with standardization of school fees in public and private institutions, free tuition programs at vocational schools as well as rotation-based industrial-collaboration courses and free technical education courses.

## **Kaohsiung to Develop Financial Industry**

At a recent seminar on financial industry development, Mayor Chen Chu urged the central government to lift restrictions on the financial industry and open a finance center at the Kaohsiung Free Economic Demonstration Zone to help transform the city. Local scholars and experts noted that establishing the offshore finance center will attract not only overseas Taiwanese capital, but also Chinese capital to Taiwan. The Taiwan Finance Research Institute has been instructed to perform a feasibility study. By creating a world-class financial center that utilizes global financial practices, investment, banking and development by multinationals will greatly enhanced, as well as international B2B transactions.

## **Attracting more foreign investment to Kaohsiung**

In response to the Kaohsiung city/county merger, the Department of Land Administration has prioritized development zones to enhance the effectiveness of land development. Concentrated population areas, city and county abutting regions, major construction sites, and locations close to transportation hubs receive priority for re-zoning. Land use programs have been initiated in anticipation of foreign participation in investment and construction projects of new districts and communities. By holding the "Kaohsiung Marine Expo" and "2014 International Boat Show" along with targeted promotional marketing, the city will actively endorse the profound strength of Kaohsiung's yacht and marine industry. To further utilize the opportunity of media exposure, the "2014 International Boat Show," shall invite numerous distinguished guests and international reporters to visit the city.

The city shall actively join regional and international cruise alliances, organizations, and associations, while forming a coalition of organizations to enhance international exposure. This will improve understanding of Kaohsiung and improving confidence in foreign investment. The city shall also

increase cooperation with the Port Co., Ltd. in Taiwan - Kaohsiung Harbor Branch. The main goals are to simplify and enhance CIQS (customs, immigration, quarantine and security). Provisions are convenient and reward measures to attract cruises and foreign tourists traveling to Taiwan will be in place. A public relations program, "Asia's Next Bay Area, Kaohsiung", explains the construction plan of three of the city's new landmarks: Kaohsiung World Trade Exhibition and Conference Center, Marine Cultural and Pop Music Center, and the Kaohsiung Main Public Library. It will have an energy saving and carbon reduction plan to promote the solar and green energy industry in Kaohsiung. The total construction plan and added waterfront light rail MRT series will cost more than 15 billion NTD. This will further attract foreign investment and business immigration.

### **Merchants Office of the Economic Development Department**

The Economic Development Bureau shall be working to improve investment incentives and rewards. A new law by the central government shall be implemented and includes incentive and subsidy targets specifically for industrial R&D projects. Total funding of this program is over 3 billion NTD, which allows per case subsidies of up to 10 million NTD in project grants. This will strengthen R&D capabilities to provide real assistance to the city enterprises, as well as promote industrial upgrading. To improve the unemployment situation in real terms the government continues its' "Shrimp's Commercial Loan," program, a local type of SBIR. It is also continuing its Care Counseling Program. Special focus is on the newly revised regulations to promote industrial development which include financing interest, rental and house taxes, enhanced wage subsidies, real costs of vocational training and benefits.

The Merchant Investment Information database will be created and maintained for effective control of information related to the city's investable land and to assist potential manufacturing investors in finding suitable land to use. The database will be completed in March 2013. This database is mainly available for potential manufacturers to review the city's land inventory. The information ranges from not yet invested in to low degree of utilization of industrial lands. Such lands include the city's industrial development zones as well as key industrial parks (such as export processing zone, etc.). Future activities will be to set up filters for the database, stating land prices, conditions, with regular updates. This is expected to enhance efficiency of processing the idle industrial land supply and demand sides, thereby increasing potential investment. Effectively assisting manufacturers to reduce search costs, and accelerating the feasibility of the investment will benefit all.

### ***Suggestions***

Establishing a single window services to the public and assigning one staff to a specific project will help to clarify the contents of the investment plan and keep track of each case during the entire administrative processes. Holding regularly scheduled cross-departmental meetings to integrate the government's resources and eliminate barriers to investment will improve overall efficiency.

To combat the growing traffic congestion in the east side of the Nantzu Export Processing Zone Park Road, the city built a new road that was opened to public in January 2012. This project demonstrates that the city government is willing to actively assist demands by the manufacturer. Containment of the Nantzu second park sewage pipeline project, the central divider island migration project, and a boost in traffic volume were assisted with government help. Nantzu Export Processing Zone Park currently includes Ying Wei Technology, ASE Group and Lee Chang Yung Group.

To assist bank financing for business, the city has taken steps in understanding vendor financing needs, helping manufacturers seek financing/banking channels and taking the initiative to negotiate with banks on a case-by-case basis. This will help manufacturers apply for related loans and government grants, and actively establish channels of communication between banks and investment companies.

Assistance with the Recruiting: The White Rabbit Entertainment Inc. recently required additional staff. Advertisements were posted in the newspapers on July 23, 2012 and the Department of Labor teamed up with Department of Economic Development to organize four job fairs from the 24<sup>th</sup> to 29<sup>th</sup> of July. More than 400 applicants participated and 150 were selected for training. 115 were then enrolled in the company, with 74 young new hires being native to Kaohsiung.

Kaohsiung is home of the first Free Economic Zone (FEZ) in Taiwan. This area needs to be tax free, needs harbor development to attract more foreign investment and should also include a processing zone inside the FEZ. Consideration should be given to expanding this FEZ to cover the entire city. This can lead to added opportunities for local businesses as they would not be outsiders in the same city.

## **Sister Cities**

### **Kaohsiung City Government**

**Kaohsiung City Government** is looking forward to a faster and more frequent exchange in ideas and dialogues between its sister's cities. (Currently, the sister cities in the United State are listed: Honolulu, Hawaii; Knoxville, Tennessee; Pensacola, Florida; Macon and Plains, Georgia; Mobile, Alabama; Tulsa, Oklahoma; San Antonio, Texas; Little Rock, Arkansas; Colorado Springs, Colorado; Miami and Fort Lauderdale, Florida; Portland, Oregon; and Seattle, Washington.)

Kaohsiung educational exchanges with sister city schools encourage communication through video technology and visits to promote cultural exchange. Great examples are the Jenks East Intermediate School in Oklahoma and the Bo-Ai Elementary School; the Indooroopilly State School of Brisbane, Australia and the Fu-Dong Elementary School; and the Young-yun High School of South Korea and the Zheng-xing High School.

To strengthen Kaohsiung's sister city relationship and promote the establishment of sister city activities, the Department of Secretariat actively encourages Kaohsiung city government to engage in business exchanges with its sister cities through visits. In this plan, the sister cities may pair with more than one department that are in close characteristics and specialties. For example in the United States: San Antonio, Texas is adopted by the Department of Finance; Portland, Oregon is adopted by the Department of Education, Department of Economic Development and Police department; Miami, Florida is adopted by the Department of Education and the Department of Marine Administration; and Tulsa, Oklahoma is adopted by the Department of Education. Kaohsiung city's delegation regularly participates in the Portland Rose Festival. In addition to the official delegation, the Shu-Te Home Economics & Commercial High School also prepared a performance group to attend the parade, in order to improve the city visibility. Additionally, Portland and Seattle City delegations annually attend the Lantern Art Festival in Kaohsiung and the International Dragon Boat Races. 2012

marked the 50th anniversary of the Kaohsiung-Honolulu sister city relationship and to celebrate, Honolulu hosted a free Aloha Concert. High-level city government Kaohsiung officials participated and also brought along local performing artists during the visit. The celebration marked the “eternal friendship” between Honolulu and Kaohsiung and laid a historical milestone.

### **International High School Student Scholarship**

The establishment of the Kaohsiung International Student Scholarship program is designed to encourage outstanding foreign student exchanges. Foreign high school students who are eager to participate in cultural exchanges or social service activities may apply. The reviewing process of admission is designed to give added weight for those who are from a sister city or friendship city. The program will explore and network with sister cities having similar potential. Complementary industries to strengthen bilateral exchanges and cooperation in the marine business industry will be considered a preference when reviewing candidates for this program. Establishment of this program will help to utilize and take advantage of exchange in academic progress, research and development, and economic partnership.

### **Tourism**

Out of the 15.5 million visitors to Taiwan in 2011, only 1.44 million entered via Kaohsiung. Available data for 2012 only includes January through November at the time of this report. However, during that time, some 16.02 million visitors came to Taiwan, with 1.46 million entering through Kaohsiung. While there has been a noticeable increase in tourism, with the industry now accounting for about 4.6% of GDP, it is still short of the global average of 10% of GDP. The US Visa Waiver Program allows Taiwan citizens holding a valid e-passport the opportunity to easily apply online at a very low cost. The new regulations allow for 90 day stays for 2 years with multiple entries. Taiwan expects about 600,000 Taiwanese to visit U.S. annually under the new program. Hawaiian Airlines is possibly opening direct flight between Hawaii and Kaohsiung, but is requesting lower landing fees. Kaohsiung is looking to promote direct flights between KHH and LAX. The largest clusters of Taiwanese people in the U.S. are in L.A., San Francisco, Houston, and N.Y. Visitors from Japan and mainland China have increased over last year.

The city is taking a number of steps to improve and grow its tourist industry. Hotels must pass government criteria to acquire a rating and Kaohsiung has **sixteen** Taiwan 5-Star rated hotels: Ambassador, HiLai, Splendor, Fullon, Crowne Plaza and Skylark at E-DA World (not in the City Center) In order to increase the number of quality hotel accommodations in the city, two new 5-star hotels will be built, one located in the Dream Mall area, and the other located about 15 minutes north, next to the new Costco (being built by the E-United Group (E-DA)). Both are expected to be open for business within three years.

In order to develop a more interesting Kaohsiung, three new programs are being established and promoted. These are the Qiaotou Sugar Factory Taiwanese Dance Show, Aboriginal dance performances, and 34 Factory tours.

Consistent themes for tourism are: city, sea, farms, temples, and seafood. The largest tourism spots include Fuoguang Mountain, with an expected 10 million visitors per year, followed by the Pier 2 area which expects to see around 2 million visitors each year. More nighttime activities and shows are being planned to help attract more tourists and improve life for residents too. Further efforts are underway to attract tourists from colder countries by promoting Winter Visits to Sunny Kaohsiung. The city is also looking to invite various sports teams to come here as part of their winter/spring training program. The city is also hoping to convince America’s MLB to open its 2014 season here, which ties in nicely with next spring’s debut of the E-DA Rhinos at Chengqing Stadium.

Increasing tourism and leisure activities in the harbor will be enhanced greatly with the completion of the Cruise Ship Port, Tourist Transfer Building, City Library, World Trade Center and Pop Music Center. Private boat tours of the harbor, at NT\$10,000 for the 2-hour tour, will be established as will harbor to ocean tours once government allowances are completed. The Love River area will also see new attractions with swan boats, gondolas (imported from Venice) and kayaks available for enjoying a more leisurely experience on a river that has been reborn. Kaohsiung wants the harbor/Love River area to become the artistic and romantic heart of the city, with the hopes that an image of a Romantic Kaohsiung will attract young couples and even become a top site for marriages. Additional ideas include water skiing at Lotus Pond.

Kaohsiung City "Hotels and Villas Quality Enhancement Plan" has entered its third year: 6 hotels certified in 2010, 14 hotels certified in 2011, 5 villas and 20 hotels certified in 2012. In addition, for the convenience of travelers choosing a quality hotel in Kaohsiung, Kaohsiung University of Applied Sciences Department of Tourism and the Department of Information Management developed a cross-platform app, <https://play.google.com/store/apps/details?id=com.kh.khgoodstay> 可以在 google play 找到該款 app. Whether you are using the iPad, iPhone or Android phone, you can search certified quality hotels of Kaohsiung 2010-2012. **It should be noted this app is only in Chinese now, but we hope to see the English and Japanese versions available soon.**

Combining nighttime sightseeing activities, attractions, leisure and health, food, and other elements will strengthen Kaohsiung's richness. Another program, "Kaohsiung Business, salty, sweet and bitterness tour", looks to highlight the city's unique geological character, having mountains, rivers and the sea all in very close proximity, creating an extraordinary variety of scenery and activities that are easily accessible. Kaohsiung also boasts outstanding agriculture and fishing specialties adding depth to the lure of the city. In order to focus on these local special resources, in the summer of 2012, the city council launched the "Kaohsiung Business, salty, sweet and bitterness tour". The tour combines hotels, factory tours, farming and fishing industry locations in an interactive and educational manner. The "Warm Winter Tour of Kaohsiung: Exciting Five-line Tours" enables tourists to experience the beauty of Kaohsiung's mild autumn and winter seasons, the florid hot springs in Liogua city and Maolin butterfly watching. A total of five routes are included in this tour program: (1) Mountain City Florid Hot Spring tour, passing through Liouguei, Mino, and Chishan districts; (2) Purple Butterfly Ecology line, passing through Maolin District; (3) Binhai 17 Flavor line, passing through Amitabha, Chei-din, Tsukuan, and Gun-shan Districts; (4) Flavorful Total Taste Shop line, passing through Nei-mon, Chiahsien, Mino, and Chishan Districts; and (5) Phoneii live traditional fashion line, passing through Fengshan, Yanchao, Da-shu, Gun-shan, and Chao-tuo Districts. Visitors choosing these tours also receive travel brochures from the government that include local business updates, coupons, promotion ads for future use-which will stimulate local industry.

The city council has plans convert the Cijin district office into a youth hotel, and Cijin Hospital into an international grant hotel to further the tourism industry and attract foreign investors Kaohsiung. At this stage, it is under review for zone change.

### **Transportation and Traffic**

In order to create a 30-minute service circle, the city government has planned transit terminal hubs to connect various public transportation networks. In addition to the two existing major transit hubs at Kaohsiung Train Station and HSR Zuoying Station, four major secondary terminals were considered at Fengshan, Gangshan, Xiaogang and Chishan. These terminals would integrate rail transportation services such as the HSR, TRA (Taiwan Rail Authority) and subway systems with long distance, local and metropolitan bus systems to create an accessible public transport network. The Transportation Bureau also has planned a Bus Rapid Transit (BRT) system to improve public transport services in the

city. Funding was being applied from the MOTC to design the BRT system and evaluate its feasibility along coastal highways. The relatively cheaper BRT system would help to compensate for any inadequate coverage of the rail networks.

Traffic congestion of the Ziyou Road exit on Freeway 10: the city worked together with the National Freeway Bureau to install traffic lights on the ramp from the south-bound Freeway 1 to the west-bound Freeway 10 to prevent traffic congestion downstream. The current configuration in place does not adequately allow for the free flow of traffic during rush hour. West-bound traffic looking to exit at either Ziyou or Bo-ai roads are forced to merge with traffic entering Freeway 10 from the southbound exit of Freeway 1. Consider adding an additional lane so that traffic entering from Freeway 1 need not merge with existing Freeway 10 traffic if exiting at the Ziyou/Bo-ai Road exit, which should also be expanded to two lanes. This is where a very large volume of traffic comes together, forming a major bottleneck.

VD measurements before and after the improvement project saw average traffic speed at Ziyou Road exit ramp during afternoon peak hours increased from 24kph to 28kph, while traffic speed along Freeway 10 Dinjing system west-going route had increased from 30kph to 35kph. While better, 24kph (15mph), and 35kph (21.75mph) are still frustratingly slow. Congestion along Freeway 10 and peripheral roads still needs to be significantly improved. With growth in both the Luzhu and Benzhou industrial zones, congestion in these areas is negatively affected as cars enter the number one freeway combine with traffic moving southbound into the city's center. Major freeway expansion just a few years ago has seen whatever improvements in the flow of traffic canceled out by the increase in commuters. Generally speaking, traffic patterns around the Bo-ai to Minzu road connections with the number 10 freeway, and freeway number one (Jiuru Road, Jianguo Road, Zhongzheng Road, Sanduo Road, Zhongshan Road, and number 88 freeway) interchanges are rapidly reaching traffic capacities, especially during rush hours. Tempers will flair, traffic laws will be stretched, accident rates will increase, and vehicle emissions will create more pollution as traffic flow is reduced.

U-turning cars are becoming quite a nuisance, and new rules need to be put in place and enforced. Too many cars attempt U-turns at major intersections, blocking traffic in the process as they prevent other cars from moving into the intersections. U-Turns should be banned at all major intersections; and allowed only downstream at corners that have less traffic or U-turn turn only lanes.

Many main roads also have far too much access by small intersecting streets, which are often controlled by traffic lights that can be both confusing for drivers and disruptive for traffic movement. These minor streets should only be allowed to merge with the near side of the main road and should use stop signs. This should reduce the total number of traffic lights while improving safety by eliminating cross traffic.

Long-term goals should be to design main roadways to include left turn only lanes (please enforce these to minimize the number of drivers using these lanes to jump ahead of other vehicles that are operating within the law). There has also been success in having left turn signals that work at the beginning of the green light cycle instead of at the end.

Road safety programs need to be established and expanded to provide road and driver safety, with exposure on radio, TV, online, and print media. A recent unofficial survey was done by a foreigner living in Kaohsiung and the results were that 33% of drivers failed to observe the rules of the road at city intersections. Of those, 1/3 simply ignored red lights, 1/3 failed to stop before the solid white line, and 1/3 stopped within the crosswalk zone.

Intelligent Transportation Center programed "in-line synchronization" traffic lights in downtown Kaohsiung area are done, and will complete city-wide synchronization of traffic lights by 2014. The

Light Rail will use adaptive signaling (traffic lights that sense oncoming rail vehicle and extends lights accordingly).

### **Dept. of Transportation**

According to the census of 2011, 65% of the population use motorcycles for their mobile needs. In order to make a better environment for pedestrians and lower the roadside parking violations, the Transportation Bureau has implement new rules for the motorcyclists around the city especially in these three hotspots: (Rui-Feng Night Market, Xing Jyuejiang, and Kaohsiung Railway Station). To advance the popularity and usage of the public transportation: expand motorcycle roadside parking fees and create motorcycle-free zones in arcades and on sidewalks. Moreover, the usage of motorcycle down dropped to 50% in the year of 2012. The government will continue to enhance the networks of the mass transit to feed the public needs.

In addition, in order to link between the systems and increase the efficiency, the bureau categorizes the mass transit system according to the different needs and population locations. In July 2012, the city bus system reached a 100% efficiency goal. Improved service, better waiting environment and less delay are the goals. There are six major transit stations in the key districts to link up to the massive network. Also to deliver better service for disabled residents, the government will provide accessible bus and accessible vans. Hybrid buses, electric vehicles, 10 Route Bus and Rapid Transit system (BRT) are coming in the near future under the government's planning. The Bureau aims to provide a better service, seamless connections and improvements to the city's public transportation usage while working to develop a sustainable eco-friendly urban green city.

The city continued implementation of various policies to increase ridership: integrates major events into timing (New Year's Eve Parade, music concerts and other activities), concessionary fares policies (bus transfer in half price, NTD 799 student monthly pass, NTD 999 happiness pass, 7 fare discount passes) and improved bus network (the comprehensive update MRT station, shuttle bus interchange information and the continued provision of shuttle bus in between MRT).

### **Parking**

Zhongshan road parking spots were eliminated to promote MRT ridership. In 2013, all towing of illegally parked vehicles will be privatized (now there is both private and municipal towing). Parking app for smartphones (高雄好停車) that shows where the nearest parking is available. 7000 new parking spaces were created this year. For traffic light problems, call 07.229.9804

### **Buses**

The city is building six new bus terminals, 5 near MRT stations, to complete transportation circuit. Best Rapid Transit (BRT): Zuoying HSR -> Zhonghua Rd. -> Kaohsiung Train Station. The City is now using 11 fully-electric buses at a cost 3 times higher than normal buses.

### **Public Works**

Public infrastructure location studies and construction projects were initiated in 2000. By 2012, a total of 12 districts were completed (11 in the original Kaohsiung City and Fengshan District). Public infrastructure studies should be completed at Renwu and Wusong Districts in 2013. Funding for the remaining 24 districts was being applied for from the Central Government. The plan would complete



studies for two districts every year. Preliminary phases would require a budget of 150 million NTD and finish investigating an area totaling 14,874 ha in the urban planning zone. A portion of the funding would be provided from the annual budget of the Public Works Bureau, with the remaining funding from the Central Government.

#### **Additional Development Concepts and Activities**

- Uni-President is considering building a 3D theater near Dream Mall;
- Central Government funded \$3.1 billion for World Expo Center
- Moving the railway underground will cost \$9.98 billion with project completion in 2017. This will connect three major areas, Central Kaohsiung, Zuoying, and Fengshan, with 8 more stations added along and 10 minute intervals between trains. Extended MRT lines will connect Chaozhou, Pingtung, Zuoying and central Kaohsiung. The expansion will reach Gangshan Station in April of 2013, with Luzhu as its north terminal; southern expansion is currently under discussion and extending east will be accomplished via railway.
- Solar powered yachts construction was continued so that the country's biggest solar powered fleet of 10 yachts would be available by 2012.

## PINGTUNG

In general, Pingtung is primarily an agricultural community that is looking to develop into industries less vulnerable to damage caused by typhoons and more in line with those natural assets that make Pingtung such a beautiful place. Good year-round weather and lots of sun make this a great place to develop solar technology. Because of its economic foundation still set in agriculture, land prices and land use are primed for development.

Typhoon Morakot was the most devastating storm of the surprisingly deadly 2009 Pacific typhoon season and was also the deadliest typhoon to impact Taiwan in recorded history. The amount of rainfall, which topped out at over 2.7 meters (106.3inches) received in three days was 1.7 times more than that would normally accumulate in one year. The torrential downpour triggered mudslides inundating villages and washing away roads and bridges. Widespread flooding trapped thousands of people in remote villages for days and the broken roads made rescue work even harder. The natural disaster left 4,800 people displaced. The storm also caused more than \$2 billion in property damage. The traditional agriculture/aquaculture industry was perhaps the hardest hit sector in the county, which caused officials to seriously rethink future development into industries far less vulnerable to the potential damage from typhoons. Clean energy and solar development seemed to be the natural solution.

### **Ongoing Projects**

#### **Dapeng Bay**

Let's start by looking at the Dapeng Bay BOT project. This is a multifaceted project having the ultimate vision of becoming a world-class all-inclusive resort destination built around a certified motorsports complex with a unified theme of bringing together air, land, and sea. In addition to this track (with its ¼ mile drag strip, road course, and two small ovals) will be a golf course, beach, marina, water-park, go-kart track, ultra-light/light aircraft airport, hotels, restaurants, and themed international and local shopping. Although there has been some progress, it has been slow and this year, the Pingtung government will push for development to move along at a faster pace. AmCham K believes that this project has the potential of being one of the biggest attractions in Asia-not only Taiwan.

Motorsports in Asia is becoming more popular and the number of car enthusiasts is growing. The fact is that this sport represents a major expansion opportunity for both US and Japanese motorsports industries. Not only can motorsports in Taiwan lead to sales of new cars (listen up Ford, GM and Chrysler), but also high performance parts, aftermarket parts, related merchandising, clothing, and more. AmCham K is also recommending that the venue should also be home to a number of driver training programs with US companies that can organize, operate, train and certify everything from road safety to racing licenses to security high-performance driver training for law enforcement. These programs can be expanded to include motorcycles and scooters, and can also be deemed appropriate for drivers who have had their licenses suspended or

revoked. Enhancing road safety is something that is eagerly hoped for in southern Taiwan. Aside from training and using the track for testing all kinds of vehicles, companies like Ford, Chrysler, General Motors and just about every other manufacturer, can offer high performance driving and club activities on site. Getting the track sanctioned by more than one racing association is critical for successfully scheduling quality racing events.

A NASCAR-USA or Planet Hollywood-like or Hard Rock-type resort would be a perfect complement to the motorsports complex, and they should give serious consideration in making the investment of building here. Since there will be a large variety of activities all in one area, it will make for an ideal vacation destination. The golf course will comprise some 70 acres and is under environmental impact evaluation. The ultra-light/light airport takes up about 450 acres, has a 450 meter runway, and is currently being assessed with regard to meeting local laws. The waterpark is in the preliminary planning and will require financial resources.

Taiwan is looking to promote its yachting industry in a big way (see the related topic in the Kaohsiung section) and having a marina adjacent to the track brings to mind places like Monaco and Dubai when Formula One comes to town.

This resort area needs to be complete if it is to achieve real success. Food, fun, and shopping must include the best that Taiwan has to offer, but also great international brands. The Pingtung government is actively seeking international hotel development in the area, as it will also be connecting Dapeng Bay with Xiao Liu Qui Island. Currently, there are some high quality hotels within an hour's drive from Dapeng Bay, including the Crowne Plaza E-DA World, Grand HiLai, Fullon, and the 85 Tower. However, a thriving resort area will fill quite a few additional hotel rooms, so more are needed.

The government is also pushing for electric buses that will connect with the HSR and MRT to complete the transportation circuit. These electric buses are more expensive, but the environmental balance is central to development in the south. Road access is already completed and in good shape. The Pingtung government also hopes to develop hydrogen cars and motorbikes for use on Xiao Liu Qiu Island.

Currently, land costs in Pingtung are lower than those in its close neighbor Kaohsiung, which should help close a few good deals for Pingtung. Local real estate prices are beginning to rise in anticipation of the resort area's development, but residents are not selling yet.

The government financing portion of this BOT project will be completed by the end of 2013. A number of financial hiccups have caused delays in this project of more than a decade, with public disapproval increasing accordingly. There is an existing building height law that will be resolved at the end of 2013, so this will make development easier and investment more attractive. The city government is assisting in development and the transportation portion of Dapeng Bay, which will also connect with the Qingzhou Recreational Area when completed. Total investment estimates are \$17.55 billion from

the government with \$5 billion already spent, and \$2 billion already in private funding with much more expected.

Local legislation to expand racing in both Dapeng Bay and nearby Kenting National Park is something that needs to get done quickly if potential investors are to feel confident that there will be no legal holdups. The motorsports portion is about 29 acres, has a total road course length of 3.5 km and is currently open for limited use. October 2014 is the deadline when the complex is expected to be operational, and the BOT contract expires in 2058.

### **Green Energy**

The Pingtung government is quite interested in seeing US companies invest in green industry there. Pingtung is looking to be a leader in solar and green energy. In the Lingbian area, three companies are making solar panels, which were purchased by TaiPower. The central government's Million Roof Program, which promotes schools and government agencies to use solar panels under a 20-year sponsored rental contract scheme, is expected to see a 10-12 year ROI. With the new tariffs imposed on solar products made in China, the potential positive impact for Made in Taiwan solar is significant.

Other development projects in Pingtung include the 2016 Green Energy Development Area, located in a 20 square kilometer area of Liu Kuai Qu, looks to be a major high-tech cluster for clean alternative energy. Lai Yi will develop the "Fortune Village", a senior citizen retirement area, in a green project that should be finalized by mid-2013. The area nearby the Heping overpass is to be developed into a 71,149.4 square foot shopping mall and hotel, with the government-owned land available for a reasonable rent and possible purchase later. Beginning November 2012, Pingtung is actively looking to schedule meetings to resource Taiwan businesses back to Taiwan and attract US investment.

## TAINAN

Tainan is the island's spiritual and cultural center and has an extraordinary history. It is one of the island's best cities in terms of preserved and restored landmarks and ancient, historic structures. The city is remarkably independent in the way it is developing, given its keen desire to transform itself into a modern all-inclusive city while maintaining its historic, spiritual, and cultural richness. As such, it faces unique challenges, especially in its oldest neighborhoods. However, it has been doing an outstanding job and should be applauded for its tenacity and determination in holding to its goals. Industrial expansion into bio-tech, high-tech, agriculture/aquaculture tech, and eco-tech are its main priorities, with growth in tourism to round out its attraction for investment and relocation in Tainan takes time and vision. Having a very capable administration and excellent leader in Mayor Lai, great education facilities, and some of the island's strongest business leaders gives it a formidable foundation on which to build their collective dream city. It is also one of Taiwan's least vulnerable cities to natural disasters.

**Innolux Corporation** has announced that it will invest approximately NT\$5 billion (US\$172.65 million) in expanding R&D and automation at its Tainan-based operations in Southwestern Taiwan. Sources at the company said Innolux is looking to push up its competitiveness in the global display arena and help Taiwan further act as an R&D center for developing more value-added products. The sources also said Innolux is pushing to have a more vertical integrated business model. Innolux's investment in its operations in Tainan is expected to create around 4,500 new jobs. Despite the investment, the company's revenues are only expected to remain steady in 2013, added the sources. Meanwhile, Innolux CEO Hsing-Chien Tuan has said the company is aiming to further develop the market for touch screens used in tablets during 2013. The company aims to increase its share of the smartphone market by shifting PC and TV panel plants to produce the more lucrative screens.

The Tainan City government is looking to the central government to subsidize or fund entirely, some interesting and worthwhile projects.

**Asia-Pacific Baseball Center:** Tainan wants to create a baseball village that will provide related training and services at all levels, from Little League up to the Professional Baseball League. This can also be a training center for countries like South Korea and Japan, who would have use as their winter training ground, since the weather here is warmer and sunny all winter. The city already has a site chosen for construction, but they require funding from the central government. Mayor Lai hopes to have this project completed before the end of his second term, if possible. The president of the International Baseball Federation, Riccardo Fraccari has come to see the place and has agreed to be a senior advisor for its development. Tainan is currently working with the International Baseball Federation, Pacific Centre as IBAF international baseball and training workshops, to make Tainan the main base for competition in Asia. They hope to attract US interest and investment in this project as well.

**The new Tainan Museum** of local arts and culture has a properly developed plan; total construction funding of about NTD 1.9 billion is needed for this project.

**Tainan hopes to establish express HSR** service from Tainan directly to Taipei, and they believe they have adequate proof of sufficient ridership to justify the expanded service. This would obviously help improve the Taipei/Tainan connection in business, and bring more tourists to Tainan too. They would also like to build a large exhibition center in Tainan jointly co-operated with the Bureau of High Speed Rail, covering an area of about 2.57 hectares of commercial areas. Furthermore, in order to actively promote the development of peripheral services of the HKCEC, the City Government enacted

in 2011 "Tainan City Award and exhibition activities implementation", providing up to a ceiling of NTD 800,000 to promote exhibitions incentives, in active cooperation with the Bureau of high speed rail handling investment matters at this stage. Direct high-speed rail plans are supported by data from the 2012 annual nine day Spring Festival passenger load to the Tainan station totaling over 210,000 people. In one-day visitor numbers from the New Year, ridership increased by 1/3 from the record set in 2011.

**MRT system** "Tainan MRT public transport system" plan, including bus and rail, and station development for efficient and flexible mass transit in an advanced transportation system with fully integrated ticketing for easy and convenient transfer would also need central government resources. The Tsengwen and Nanhua Reservoir de-silting work is needed urgently. Due to 88 storms that hit three years ago, capacity of the two reservoirs reduced by 110 million cubic meters. Central government resources are needed to speed up the progress of dredging in order to avoid water shortages for agriculture and livelihood in the South.

**Underground Railway:** "Taiwan south urban district railway underground" plan was initially approved in September 2009, and extends from the Yongkang Bridge at a length of 8.23km. This NTD 29.36 billion project is scheduled for completion in 2017. Future subway lines and stations will be requested according to local requirements and needs central government funding and support. The engineering design, detail design, mechanical and electrical systems work is well underway, such as environmental monitoring and contracting construction works-arounds. This project is a key to the future expansion of Tainan and will lead to numerous opportunities for urban development.

**National Taiwan Prehistoric Culture Museum:** Overall plans to save unearthed precious artifacts and cultural assets, would require funding of 1.5 billion dollars, but the budget allotment is still not in place.

**Flood Control:** there is an NTD 45 billion flood control budget gap for Tainan City, who for ten years had 15 billion for their flood control budget. But according to the flood prevention standards set by the Department of water resources, overall total needed was more than 60 billion. Before the central government will grant funding, Tainan needs to develop a water management contingency plan, subject to the one-day rainfall not exceeding 250 mm.

**Restoration of coastal sandbar:** this is a recurring problem that requires a long-term solution and central government funding (it is unclear which central government department would be responsible for this). It is estimated that the project will cost a total of NTD 500 million (this is total cost, not annual). Beach and sand bar erosion is also of great concern on the south shore of Long Island, in New York. A series of buffers were built to trap the movement of sand, thereby greatly reducing annual erosion without affecting the natural beauty of the beaches. This solution could work here in Tainan.

**Direct ocean shipping from Anping Harbor to Xiamen:** Anping Harbor belongs to the central government, who plans to invest NTD 880 million to build an International Waterfront Park. This project would certainly help direct shipping, but also can benefit the area by boosting tourism revenue. Anping harbor is nearby Xiamen, so direct shipping from southern Taiwan industrial and commercial sales to mainland China are possible.

**Regular flights to Tainan:** this has already been discussed with representatives from Sichuan Airport; Tainan wants to see direct flights to and from east coast cities of Mainland China. Access by air is critical for boosting trade and increasing tourism, so this project requires serious consideration. With Taichung, Tainan, Pingtung and Kaohsiung all looking for expansion and improvements to their

airports, this will be a complicated issue. Feasibility studies should be able to determine the level of investment that would be economically viable for each of these locations. Private investment by companies looking to bring brand name shopping and dining into these facilities can help offset costs and increase the likelihood of success.

**Tainan has 11 Sister Cities** including Monterey and San Jose, California; Kansas City, Missouri; Columbus, Ohio; Orlando, Florida; Fairbanks, Alaska; Oklahoma City; Huntsville, Alabama; Carbondale, Illinois; Laredo, Texas; and Snohomish County, Washington. Recently, it has become increasingly clear that these Sister City relationships can provide significant mutual benefits. Efforts should be expanded to ensure that Tainan's Sister Cities form closer working relationships to develop more bilateral opportunities in education, cultural exchange and business.

**Ten Flagship Plans for Branding Tainan** are underway, including "Invest in Tainan", "Pro-Water Tainan", "Culture Capital, Creative City", "Sightseeing Paradise", "New Agriculture", "Low Carbon, Big Green Tainan", "Warm Tainan", "Smart City Tainan", and "Convenient Tainan" programs. These programs will contribute to a forward looking city, to assess benefits and budgets, having a quarterly review master plan, subject to the needs of the public in urban development.

#### **Research, Development and Evaluation Commission Projects**

(A) Tainan wants to be an island leader in bringing maximum Wi-Fi access to the city.

(B) Open data platform to provide better quality and access to government data. While Data as a Service (DaaS) is not yet mature, establishment of this platform can be regarded as a base for a viable content services platform.

(C) Rural intelligent marketing strategy planning: Importing of innovation and technology and the right service plan to rural sites, for packaging design, creative marketing, development of core values, and creating economic opportunities with local characteristics, contributing to local resident living environment and industry recognition while attracting young people back into the local industry to create, improve rural market production. At the same time, rural marketing platform service modules can be imported in phases throughout Tainan's rural areas, to creation of remote vision of environmental education in rural areas.

(D) Tourism services system strategic plan of action: Tainan is southern Taiwan's home to an extremely large variety of monuments, temples and historical sites, local and world-class dining, local arts & crafts, great shopping and exquisite landscapes in one city. In accordance with today's innovative services, a SoLoMo (Social, and Location, and Mobile) program will be integrated into the tourist industry. APP creation will be designed to meet the Tainan tourists' demands to travel "Anytime and Anyplace". Long-term goals are to create a Tourist Passport that will be targeted for both Taiwanese and international tourists.

(E) Smart electric car policy planning will look to develop electric transportation options that will include everything from bicycles, scooters, cars and buses. Overall planning and design is complete; this program includes various value added services, phased value added services related to building electric cars, promotion of electric vehicle services for Tainan, and raising Tainan public awareness of the available options and benefits, while increasing an electric bicycle transportation culture.

(F) Smart grid policy planning: 1. Based on the experience of advanced countries, Tainan's Smart Grid establishment will primarily focuses on advanced meter reading system, namely the import of smart meters, as a basis for smart grid building. Beginning in the Chiufen area, all smart meter electricity information and power deployment, a GIS system will be used as the grid integration platform, providing real-time analysis of electric power consumption, alerts, power output, historical data, real-time trend charts, and more. 2. This follow up phase looks to make Tainan the first 100% Smart Grid city in Taiwan.

### **City Marketing**

The city government maintains an information and international relations department that is responsible for external international relations in a convenient contact window that includes municipal international study, city marketing and foreign guest itinerary planning and hospitality, and international affairs. City marketing through a multimedia marketing pipeline will enhance visibility.

### **Economic Development Board**

Construction-friendly investment environment through a single international investment window service will streamline future growth. The County/City merger was completed at the end November 2012. Tainan city business investment results reflect a bright future. Company registration growth rate was (2.79%), and commercial capital growth rate was (4.09%) with an increase of 491 investment cases that attracted 3,491.300 million investment and created 4,925.5.6 billion output and 33,831 in employment opportunities.

The Tainan Exhibition Center plans for promote overall city development, economic development and traffic high-speed rail engineering cooperation, with 600 booths of in multifunctional composite type venues centered around the Tainan HSR station. Ultimately, the goal is to complete the Tainan Convention and Exhibition Center by the end of 2016.

Activating economic and trade plans and expansion with regard to economic and trade exchanges across the Taiwan Strait needs to be increased, as related to the cross-strait ECFA led bilateral exchange opportunities, by actively promoting the development of the Anping port free trade zone (or free economic demonstration zone), and by promoting direct flights across the Taiwan Strait to enhance port competitiveness and overall energy to create cross-strait economic and trade exchanges.

### **Tainan's Special Industries**

Tainan industry specialties include:

Rubber and plastic product manufacturing; Metal product manufacturing, metal surface processing industry; Machinery equipment manufacturing workshop industry; Computer, telecommunications and the audio-visual electronic product manufacturing; Power machinery equipment and equipment manufacturing workshop industry; Transport tool manufacturing workshop industry; Car part manufacturing; Precision, optical, and medical equipment; Watch manufacturing; Food industry related products; LCD TV manufacturing assembly industry; Photoelectric material and component manufacturing; Logistics and warehousing; Power equipment manufacturing (battery and lighting equipment assembly); Car manufacturing workshop industry (electric and hybrid car assembly); Basic chemical manufacturing (manufacture of gas); Chemical manufacturing; and Chemical products industry.

Programs for pre-school registration to enhance the quality of early childhood education while reducing the financial burden on parents, with 2-4 year olds attending public kindergarten fee, are an important part of improving the quality of pre-school education.

Creating life education programs, strengthening school management inspections and public security assessments; promoting adult education and life adaptation courses with the goal of ending illiteracy and encouraging community education, being proactive on social issues; constructing senior citizen learning spaces, and providing expanded counseling are also goals for Tainan's life-long learning enrichment program.

Building a cloud-based education system with an expanded international vision Education Center, continued updates of school teaching equipment; using network resources, and assisting students



using technology provides remote area learning opportunities. Upgrades to remote area English teacher programs; building a Southern Taiwan Astronomical Education Park; and promoting a foreign language built library will help to upgrade the International English Village effectiveness and strengthen international exchange.

### **New agriculture, New country, New farmers**

New agriculture, new country, new farmers ' flagship project

(A) Rural regeneration (B) new agricultural and new rural farms and new farmers

1. Development local featured management plans
2. Established modern vegetable production areas
3. Grains production areas
4. Fruit production area
5. Flower production area
6. Fisheries production area
7. Aquatic products security management plans
8. Counseling high biological security
9. Non-polluting and the energy-saving livestock industry
10. Grants for community implementation of Green Landscaping
11. Development of agricultural and fishing industries cultural and rural tourism
12. Create leisure fishing port tourism

### **Important Projects in 2013**

(A) The establishment of agricultural production area and new agricultural development.

(B) The construction of an additional aquaculture production area to improve the quality of aquatic products.

(C) Strengthening the management of livestock feeds and feeding to ensure health safety of animal products.

(D) Implementation of the dog and cat management program and the promotion of stray dog sterilization and working dog adoption.

(E) Organizing the first Taiwan International Mango Festival and the 2013 Taiwan International Orchid Exhibition.

(F) Handling of general public fishing facilities, yacht building and rent commercial landmarks and tourist fish market direct center operations.

(G) Handling wild animals, precious tree preservation, strengthening wetland protection, creating biological diversity.

(H) Counseling to promote organic farming, production and sale, Kat gardens, production safety and health of agricultural products.

### **Tourism**

To improve the tourism industry, future policy objectives are as follows:

Development of cultural and heritage sites which have great historical value and can be a primary focus for cultural sightseeing and generate revenue while nurturing a growing tourist industry.

With its rich history comes a rich food culture and Tainan has much to offer. Taiwan in general is a place where each region is famous for at least one product and one food specialty. Tainan has more than most, due to its large agricultural land area, great weather and year-round growing season. In fact, Tainan has a rather large "food-sightseeing" tradition, where travelers will move about the city just to try out all the different food specialties that are famous, with the added bonus of being able to take in quite a bit of wonderful scenery at the same time providing a feast for the eyes and well as the taste buds, and enough fun places to walk to burn off all those tasty calories. There is Dongshan coffee region, jade well mango district, and xinshi White Lotus fog area, Hua Qing hot beef, and the goose Festival, just to name a few.

## **FDI**

Tainan City and County merged on December 25, 2010, being upgraded to a municipality. Similar to Kaohsiung, the merger created a number of challenges for the new municipality, but also much more opportunities. With standardization being the major challenge, it takes a lot of work to create a fair and level field for education, business and its people. However, having a sizable increase in land availability and population creates whole new areas for investment, development and revenue generation. Also, new assets include industries that were outside the old city limits, including many agricultural and tourism destinations open up. Development of unused or underused land becomes quite different when not constricted by historic city borders. Due to this expanded investment potential, Tainan created an investment business section in the beginning of 2012. In the form of a single global investment window to assist in land use, plant establishment, business registration and labor and environment related issues.

## **Five New Major Industries**

Tainan City is trying to attract and support intelligent electric vehicles, smart biotechnology, green energy, green building and cultural creativity (fashion) as specific industries situated in Tainan, and lead Tainan in industrial and service upgrades.

Agricultural trade development is a core target, combining bio-tech with an already outstanding agricultural industry. For Tainan to become a green, low carbon city for core target by actively promoting green energy industry, smart electric cars and smart green buildings. To promote Tainan as an international sightseeing and Leisure City as another core target. This includes development of the fashion industry, along with urban renewal projects and integration of Tainan's resources of historical culture and traditional crafts industry. And industrial upgrading measures such as counseling, to assist investors in response to environmental changes, while consolidating greater Tainan city's own industrial competitive advantage, with a target to promote Taiwanese optimal long-term investment in Tainan, promote commercial and industrial development and employment growth, improving local prosperity and development, raising the visibility of central policies, and creating win-win situations.

## **Education**

Deepening the arts education, development of suitable learning career development planning, adaptability and diversity courses and counseling; implementation of normal classes, and the establishment of remedial teaching mechanisms; universal access for disadvantaged students; advocating equality of education and benefits such as free lunches and textbooks; free after-school care services for special education students; introduction of student summer vacations and after school care for the disabled are also development priorities in order to help provide equal opportunities.

Improvements to the quality of campus safety, teacher professional development and school evaluation mechanisms; continued reconstruction of rundown schools, premises security reinforcement, and preserving historic buildings will be included in the development of Tainan's educational sector.

Tainan City Government is committed to connecting high schools and universities with industry to cooperate in helping students to successfully enter the job market with relevant supporting measures as follows: technical and vocational education and tertiary institutions and industry collaboration, strategic alliances; Encourage the 18 universities and high schools to establish strategic alliance partnerships with the needs of industry, sharing of resources, to establish a mechanism for horizontal and vertical integration, and promoting the development of effective community education learning.

Through a variety of teaching activities, seminars, demonstrations and competitions create a means by which to maximize interest by local students to learn and work in their native Tainan.

1. Collaboration with tertiary institutions to develop whole school curriculum, curriculum design can be effective on vertical integration, and better respond to the special needs of community.
2. Setting up large education integration Center in Tainan, with a division of tasks, such as financial resource assistance, human resource nurturing, providing learning materials and space in order to create the most positive learning environment.
3. Strategic Alliance integration into teaching, research, service, equipment, and resources to actively promote the exchange of assets between schools.
4. Selected manufacturers willing to cooperate with higher vocational and tertiary institutions and to give priority to family of economically disadvantaged students enrolled.
5. Connecting technical and vocational education with industrial development, building to accommodate a school based on employment needs, thereby creating a new mode of education having a more targeted learning and vocational testing experience and the implementation of activities enhancing career development education in Taiwan.
6. The creation of art classes and art programs, providing student self-concept exploration, career exploration, observation of imitation, simulation and adaptation of skills needed in the workforce.
7. Processing adaptability studies in high school vocational education system advocacy, facilitating student aptitudes, interests, volunteerism, or school performance as the approach to based development on.
8. With a focus on theory and practice of teaching systems, develop technical and vocational education based on "learn by doing, do by learning".
9. To promote practical education, develop active and diverse skill courses for students, and innovative approaches to the implementation of various education opportunities in high school vocational education and guidance.
10. Joint planning of a regional or industry "last mile" employment program, to assist in the transfer of students into the business community, primarily targeting full employment potential and strengthen students motivation and innovation with practical experience in the field.
11. Schools having cooperation with manufacturers will establish a multi-bi-directional dialogue platform, combined with industry resource needs and joint course planning, training focused on industrial development and the needs for professional and technical personnel, thereby shortening the talent gap between school and industry.
12. Establishment of an evaluation mechanism of student abilities to assess the gap between existing capacity and employability of students, and offering professional make up courses to fill those gaps.

## CONCLUSION

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This fourth edition of the AmCham Kaohsiung White Paper has been expanded to include a more comprehensive snapshot of general issues, as well as those topics specific to Kaohsiung, Tainan and Pingtung. One theme runs throughout these pages: southern Taiwan is rapidly developing into a cleaner, more eco-friendly place where new business opportunities and job creation are on equal footing-with improving the environment at the forefront of all local and central government focus. Taiwan's central government has made great efforts in providing funding for numerous development projects. With the global debt crisis and the sluggish US economy continuing to be stubborn issues, combined with changes in competition from China, South Korea, India, Mexico, and Brazil, great challenges remain for Taiwan. However, these changes also bring with them new opportunities, not only for Taiwan, but for the international community looking to Asia for growth. The strong entrepreneurial spirit and creativity of the Taiwan people maybe their greatest assets, but geopolitical and global economic changes are helping to make Taiwan a more attractive place for doing business.

In discussions with the various southern Taiwan government officials, it became quite clear that all are looking to grow foreign investment, with a distinct preference to see much of it coming from the US and Japan. In almost all the projects and plans mentioned in these pages, opportunities abound for US business involvement. Taiwan's long standing commitment towards working with the US on matters of mutually beneficial business is stronger than ever. However, southern Taiwan needs to put additional efforts into understanding what foreign investors and enterprises want in their relationships with Taiwan. One particular area of opportunity is in the growing potential for Taiwan companies to act as liaisons or middlemen for US-China business opportunities. A recent survey of US firms operating in China showed that 40% are ready to abandon their facilities in China. Taiwan offers a number of advantages for those companies who are looking to do business in China, but choose not to because of concerns over IP rights or the lack of understanding of the language, laws, and culture in China. Taiwan has a long history with the US and many business relationships have been established and well-maintained throughout the years. Taiwan is a vibrant democracy, operating within the rule of law, having standards and regulations that are often quite similar to those in the US. Politically, culturally, economically, geographically, strategically and logistically, Taiwan is a perfect partner with America, which does represent significant opportunities on all sides. For companies looking to Asia for the first time, for enterprises that are already in the region, or for those companies that left Taiwan for the unfulfilled promise of lower manufacturing and labor costs, Southern Taiwan is worth looking into.

Southern Taiwan offers six (6) key advantages, namely:

1. Excellent geographical position and logistics;
2. Outstanding sea and airports with a natural advantage of good year-round weather;
3. Comprehensive industry clusters;
4. Abundant manpower supply;
5. An extensive industry transportation network; and,
6. Complete provisions for foreign businessmen including excellent accommodations, restaurants, mass transit, and entertainment.

The American Chamber of Commerce – Kaohsiung

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## 致謝

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2013 年，高雄美國商會很榮幸發表第四年度白皮書。在製作這本白皮書的過程中我們收到了前所未見的回應與支持，特此致謝。在與陳菊市長指導下的高雄市府團隊數次會面中，幾乎每個局處都對當前的議題與計畫分別提供完整報告（英文）。在與賴清德市長和台南市府團隊會面時，所有局處都派代表出席，也提供一份完整報告（中文）。屏東縣府官員、行政院南部聯合服務中心代表、觀光局和經發局人員，以及內政部入出國及移民署高雄市第一專勤隊（特別要謝謝李鳳珠女士提供移民相關數據）等，皆撥冗與美國商會成員見面討論各項議題，並提供豐富資訊及給予協助合作，我們由衷表達謝意。

在此，我們也要感謝所有提供意見的官員、領導人、教育人員、企業家、團體與個人。他們的盡心盡力提供我們了解台灣南部對一些議題的完整觀點。此外，高雄美國商會的成員和朋友也貢獻了許多時間蒐集資訊，並提供所處產業的相關意見與看法。

我們也要對美國在台協會（AIT）台北與高雄辦事處由衷表達感謝之意，AIT 總是不吝對我們的白皮書以及其他計畫提供各種協助與支援。我們也要謝謝台北美國商會的同事提供寶貴的協助，他們 60 多年來的卓越成就使我們獲益良多。

高雄美國商會也要謝謝 Lauren Anderson 女士所付出的心力與提供嶄新的觀點，謝謝她大力協助共同撰寫此次的 2013 白皮書；我們要謝謝吳以琳女士與楊敏慈女士協助安排會議，並且把永無止境的中文資料翻譯成英文。我們衷心感謝沈婕縈老師，一如既往為白皮書提供卓越的中文翻譯。最後要謝謝呂艾倫女士，在她服務於高雄美國商會這麼短的時間內，就因其努力不懈的付出與出色的才能促進我們組織向上提升。謝謝所有挪出寶貴時間參與且分享意見、知識與經驗的人士，謝謝你們為南台灣更美好的未來盡一份心力。

南台灣白皮書代表高雄美國商會成員與南台灣工商業界所關注的產業議題，但這本白皮書最終目的是要促進台灣整體經濟條件升級，使本土與跨國企業均能受惠。2013 年度白皮書所探討的議題攸關穩固根基的建立以帶動南台灣的未來成長。這份白皮書也謀求台灣大眾的利益，因其鼓勵發展全面性高品質的產品與服務，以提升台灣全體民眾的生活品質。

高雄美國商會宗旨在於促進認識、溝通、合作與承諾，我們為創造美好的未來一起努力。謝謝。

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## 序論

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2012 年對南台灣而言是值得紀念的一年。過去幾年的努力正繼續展現改進的成果，每個城市正在實現更大的連貫性，幾個重要開發案已近完工，許多發展計畫正在成形或即將展開。台灣南部繼續轉型為更乾淨、更高科技、更以服務為導向、更易於觀光旅遊、更易於外商投資、更加國際化以及更具國際競爭力的地區，轉型發展已取得很大的進展。然而，許多挑戰和障礙仍然存在。要在當今世界取得成長從來都不輕鬆。但如果我們仔細觀察，會找到那些隱藏在困境中的機會；如果我們追求卓越，一定會成功向上提升；如果我們了解競爭對手，也將了解如何可以更好地競爭。高雄美國商會在此要對這些在南台灣發生的所有令人驚嘆的努力與成果致意並且大表讚揚。產官學界、地方與中央以及社區的通力合作與相互承諾，一再顯示了透過合作努力，我們可以完成不可思議的事情。我們要讚揚你們的不懈努力！

面對世界各地的競爭壓力加劇，改善地方經濟和生活品質的任務從來沒有像現在這麼複雜，而且受這麼多外在因素的影響。全球經濟危機似乎逐漸被人淡忘，但仍有一些棘手的障礙影響了我們的日常。為了更好定位自己迎向強勁的未來，且在為 2014 年即將發生的一個重要里程碑做準備之際，2013 年南台灣需要認真關注一些議題。高雄 2009 年世界運動會帶來了正面效益，這是無庸置疑的。主辦世運會加快了南部的發展，包括高鐵、捷運、高雄巨蛋、市運主場館等還有更多其他的建設。毫無疑問地，當年是高雄轉型邁向未來一個劃時代的時刻，就好比是高雄的重生。那是我們發光發熱的時刻，讓我們透過友好競賽與體育精神大聲向世界說「嗨！」。2014 年將是另一個這樣的一年，但這一次將聚焦在商務。2014 年 5 月，屆時全新啟用的高雄世貿會展中心將迎接其首次的會展活動：台灣國際遊艇展。來自世界各地 1500 多個參展廠商將會蒞臨高雄，聚焦台灣自身的世界級遊艇產業。這個活動關係到高雄世貿會展中心和

遊艇製造中心即將在今年底完工，這很可能是南台灣有史以來嘗試過最雄心勃勃的商業活動。不容忽視的是，本次活動不只是對南部，而是對整個台灣的未來將產生重大影響。它會影響觀光旅遊、服務、金融、貿易等產業。在 2013 年所做的籌劃準備將會直接影響這個活動是否能成功將高雄的工商業推向全世界。

2012 年底、2013 年初，台美經貿關係上有顯著的進展。先前的美牛禁令不過是一場不太好的回憶罷了，再加上台灣納入美國免簽證計畫，未來重啟「貿易和投資框架協議」（TIFA）的協商談判看來很有希望。強化與美貿易不僅有利於促進雙方經濟和創造就業機會，但同時也向全世界發出一個強而有力的訊號：台灣是重要的、值得信賴的夥伴，而且在與台灣建立夥伴關係上，美國這個全球最大經濟體認為有很好的立意來努力提升關係的層級。但此舉對台灣所帶來的助益要遠遠超過美國太多了。透過與美國建立 TIFA，台灣在招商引資、吸引企業進駐上會更具競爭力，會更容易且更有可能與其他國家簽署貿易協定。台灣積極爭取加入「泛太平洋戰略經濟夥伴關係協定」（TPP），除了需要建立更強大的經貿與透過商務往來建立關係外，TIFA 協議是達成該項目標的重要步驟。

地方機場、港埠、碼頭的現代化和國際化方案目標是使其盡可能對環境友善、對商務友善，這些方案的執行現在比以往任何時候都更重要。交通運輸、觀光旅遊、外商投資獎勵辦法和一系列發展計畫，正持續形塑一個更完整且更具競爭力的南台灣，目標是將南台灣打造為利於貨物轉運、民眾度假觀光、公司投資、企業領袖與員工進駐和生活的地方，而高科技和乾淨能源製造產業將成為台灣南部眾多特色中的焦點。為實現目標，南部很積極著重於這些領域的改進。雖然還有更多工作有待完成，但高雄市的一切努力與成績值得肯定，中央政府在區域發展中所起的重要作用也值得肯定。台南地區也同樣關注其未來需求，他們所規劃或進行中的發展計畫也同樣雄心勃勃，並且已取得重大進展。

即使這兩個城市面對縣市合併後帶來許多相同的挑戰，其經濟成長的主要引擎現在需要調整、進化，但在現代化和擴展城市發展的同時，他們仍需兼顧維持具有重要歷史意義的地方特色與豐富的文化內涵。屏東縣遭逢莫拉克颱風肆虐學到一些慘痛的教訓後，不得不認真反思該如何以最好的方式將未來自然災害的負面影響降到最低，對此屏東也以非常積極的方式回應。對美國來說，台灣是充滿機會的地方。台灣持續強勁的經濟體並且專注於成為各個領域的龍頭，對每個層級、所有形式的美國商務關係而言，這都代表了豐富多元的需求、選擇與前景。例如，台灣擁有成為通往中國與亞洲最佳門戶的潛力，因為其地緣政治位置、情



勢穩定、遵行法治的民主制度、尊重智慧財產權且具備其所需的法律基礎等特色，都應能提高美國企業的對其信心，再加上台灣與周邊國家具有歷史、語言和文化的連結。台灣可說是前進亞洲商務的最佳中間人。

伴隨發展、成長而來的是對更可靠、更乾淨電力的需求。台灣的核電營運已存在多年；核電很可靠，是沒有錯；但並非沒有爭議。2011年3月日本福島地震和隨後的海嘯襲擊造成近兩萬人死亡，並破壞福島第一核電廠導致輻射洩漏至空氣、海洋中，引發了世界上25年來最嚴重的核事故。福島核災爆發後到截至2012年12月，日本50座核子反應爐幾乎全面停止運作，只剩兩組仍在運轉中，政府同時也檢討核電安全。台灣的核電安全也被放在顯微鏡下檢視。仍在興建中的核四廠成了恐懼、擔憂和抗議的焦點。雖然只有很少或根本沒有證據證明這些恐懼或疑慮是有道理的，但大眾需要知道核四是安全的。台灣可能必須放眼於一個不同於今日的未來，在那個未來，核能在寶島台灣能源佈局中所扮演的角色和今日明顯不同。

南台灣未來的成功很大程度上要取決於兩大支柱：一邊是旅遊業和服務業、另一邊是乾淨能源業和高科技製造業。這使得今日學生的教育變得非常重要，以及教育是否能讓學生做好準備成為明日勞動市場中重要且具有生產力的一員。因此培訓課程和教育必須以最大程度著重於未來經濟發展的需求。高科技淘汰了許多老舊的生產方式，甚至曾被認為會搞得全身髒兮兮的體力勞動工作，也正在演變成完全自動化產業，不再需要黑手而是需要技術人員和工程師。本世紀最有成長潛力的產業最有可能是乾淨能源產業，而改善環保需要各種類型的工程師、設計師、技師、安裝和維護人員等。醫學和法律專業人士的需求也會增加，因為更多的外資進駐台灣帶來醫療生技、奈米技術、行動技術和電腦技術等領域的新商機，這將產生新專利、新產品、新方法、新許可等。

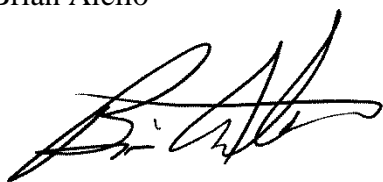
在旅遊業 / 服務業這一支柱上將需要各種人才，包括導遊、司機、餐廳服務人員、飯店工作人員、銀行業者、旅遊景點開發商與工作人員、國外連鎖品牌等，還有其他更多類型的人才等等。這無疑將提高全球對台灣的認識，也將提高台灣和世界溝通所需的水準。英語仍是商務溝通的首要語言，因此南台灣需要加強其培訓能力，將英語整合到日常生活和教育當中。為了滿足未來商務發展的需求，在爭取新的、更巨大的機會時，日語、英語和西班牙語將變得更加重要。在台灣，中文總是會扮演重要角色；為增加與中國大陸的商機，簡體中文可能也是值得考慮的選項。

在所有這一切中，教育必須發揮作用促進未來的勞動力做好準備。

南台灣若要真正實現未來的集體目標，必須要繼續連結（Connect）、溝通（Communicate）、協調（Coordinate）、合作（Cooperate）與競爭（Compete）。未來發展的每個面向都必須維持此「5-C」策略。這本白皮書所探討的議題相互關聯，就好比我們的生活與在地社區息息相關。我們必須要有宏觀與遠見迎向未來，我們要知道每個單一環節都仰賴數個計畫、方案、活動的成功執行，以及許多人的參與。

在南台灣發生的這些挑戰與改進、阻礙與發展當中，為企業家、全國與跨國企業領袖和投資人帶來巨大商機，這樣的契機不容忽視與低估。

Brian Aiello



高雄美國商會會長

第四年度南台灣白皮書由高雄美國商會（AmCham – K）發表，內容涵蓋對南台灣商業環境的整體評估，檢視商會視為當前重要的議題，以及提出政策建言。高雄美國商會的年度白皮書主要目的為促進了解、提供資訊與支持倡議。白皮書提出對台灣政府及民眾的建議，所探討的議題對南台灣的商業環境有重大的影響。此外，白皮書的發表也提供美國政府官員、民意代表與其他團體有關台灣商業環境的資訊。 All rights reserved. ©AmCham Kaohsiung

## 主要建議

2013 年對南台灣的未來而言必定是非常關鍵的一年。美牛進口解禁、台灣納入美國免簽證計畫、TIFA 重啟協商、中國經濟的降溫、歐債危機的持續以及全球安全等各種議題匯集，都使南台灣經濟情勢更趨複雜多變。

- 夏威夷航空開闢檀香山直飛高雄航線的協商正在進行中。夏威夷航空公司一直是列為世界上最好的航空公司之一，他們目前積極擴展亞洲市場版圖，所以高雄必須抓緊時機。吸引到高雄直飛美國的航線，對每個產業而言都是利多。只要必須透過台北 / 東京 / 首爾 / 香港轉機到美國的事實沒有改變，高雄就仍處於更艱鉅的位置。
- 即將到來的 2014 台灣國際遊艇展是南台灣最引人注目的商業活動。必須做好萬全的準備籌劃，以確保活動成功。雖然這是高雄主辦的展覽，但一個精心規劃與協調的活動，台南、屏東也可從中受惠。台灣位居全球電子業與電腦業龍頭，我們應該善用這些長處建置可以提供有關文化、活動、購物、住宿、餐飲等各種豐富資訊的 app，方便使用者隨時取得完整訊息。地方政府不僅必須盡可能呈現最好的一面，也必須把這個活動視為招商引資的好機會。
- 新建的高雄市立圖書館總館應考慮增加大量的英日文藏書，以為所有居民提供更廣泛的閱讀經驗，並且透過提供精神糧食吸引更多外資與人才進入勞動市場。此外，應設立電子書方案，允許有識別證或居留證的民眾暫時「借閱」書籍。中英日語等外語書籍的藏書選擇可依據國際暢銷書名單和本地讀者需求來提供。電子書方案的註冊方式應設計為首次親自到圖書館辦理，日後便可選擇在線上或親自辦理。電子書不會因為時間久遠而受到損壞，也不會受限於不良借閱使用習慣、氣候、溫度、濕度等影響，因此一旦圖書館系統建置電子書方案後，便可永久有效。台灣學術界也可善用電子書方案，從小學生到研究生學習材料都可納入。
- 中央與地方之間的溝通合作已有改善。南部若要持續看見實質成長，中央政府還須發揮作用，而且地方政府須願意盡可能溝通合作。政治分歧或多或少總會影響中央地方之間的關係，但唯有攜手合作才能有益於全台灣，我們所有人將會更強大。

- 姊妹市的重要性是顯而易見的，有一個很棒的例子：邁阿密與高雄簽訂 MOU 合作舉辦 2014 台灣國際遊艇展。地方官員需要安排更多會面與訪問美國姊妹市，以強化姊妹市關係的聯繫、擴大共享的利益。
- 在較大規模、需要引入大量民間資金的開發案中，例如大鵬灣，地方政府應考慮給予更優惠的條件，尤其是對「高知名度品牌」的廠商，像是 Planet Hollywood 或是 Hard Rock 飯店；一旦成功招攬高知名度品牌進駐後，連帶其他二三線但也同樣重要的品牌自然會被吸引，促使計畫圓滿成功。盡一切努力招攬知名品牌，這會發揮吸金效應，引來大量小規模的資本投入。
- 高雄、台南、屏東的都市規劃需要根據各自獨特之處與各自的發展願景而有不同的思維。曾經是工業重鎮的高雄需要繼續轉型為乾淨、綠色、多方位的城市，迎接遊客、企業投資的到來。藉主辦 2009 世運會，高雄的進展比起鄰近城市已經有了相當好的開端。台南的歷史沉浸在豐富的精神文化內涵中，至今在城市各個角落仍很明顯。府城的發展需要很謹慎，她所吸引的高科技和綠色企業必須能和城市的文化與古蹟相得益彰。這不是簡單的任務。台灣西南部三個縣市中，台南的任務是最為困難的；必須要有相當的創新思維才能在發展的同時兼顧歷史與文化的維護。所幸台南不乏創意人才，可以擔起這樣的任務。屏東可能是這三個縣市中任務最為容易，但工作量卻是最繁重的。2009 年莫拉克颱風肆虐，幾乎使得發展史上留下空白的一頁。屏東縣以農業養殖業為主的經濟受損最為嚴重，也因此學到慘痛的教訓；重建方式是將城市受氣候變遷衝擊的脆弱性降到最低。發展太陽能、生態旅遊及本地資產等產業，再加上世界級的國際休閒渡假遊憩區，即大鵬灣發展計畫，有了這些屏東就可上軌道了！儘管上述論點將情況看得太過簡單，但需要牢記的是協調發展的重要性，使其可以和周遭區域相輔相成並且提高整體價值。確保所有周邊協力產業與基礎設施也一併納入規劃，免得到頭來打造了一座夢幻天堂，結果前不著村後不著店，而且進出也不甚方便。建全的都市規劃可以避免發展拖延數年、節省數百萬元的經費。為了在推動旅遊和招商引資上充分發揮潛力，你們需要確保來城市參訪的外國人離開時的感受是「我等不急要快點再回來這裡」、「我希望家人來體驗這一切」、「我可以在這裡生活、做生意」。
- 吸引新的投資與外商投資進駐南台灣關鍵在於最棒的行銷。在研發招商行銷策略時，城市須提出具體明確的問題。本市可以提供什麼？物流、優惠稅制、自由貿易區、促進投資及遷廠獎勵、商辦廠辦空間、人力資源及可訓練的勞力（意即可以有效快速上手的技術勞力）、已在本地大學受過相關技能培訓的勞力、穩定優

良的環境（政治、經濟、衛生安全、環境、教育等環境，當然還有舒適宜人的氣候）？為什麼值得到本市投資？短期及長期效益？和其他也在積極招商的潛在競爭城市相比，本市生活條件可以提供什麼優勢？對於有冒險嚐鮮精神的投資人，本市提供什麼特殊之處？對於尋求穩健踏實的投資者，本市提供什麼令人放心的條件？本市有甚麼道地本土特色以及國際知名品牌？

- 目前位於中國大陸的美國企業有 40% 想要退出；這對台灣來說是個重要的機會，台灣可以作為中間人、樞紐、促進人以及聯絡人，可以作為真正通往亞洲的門戶且是跨國企業可以信任的夥伴。台灣是一個有法治基礎的民主國家，對企業的保護在合理範圍內；台灣的經驗、語言、文化、企業與創意可已使其很順利的在亞洲各地做生意。新加坡、馬來西亞、泰國、印尼、越南、柬埔寨、寮國、菲律賓等國家都在積極招攬外商投資及吸引國際遊客。南台灣若要看到實質改善成果，就必須強化行銷、提升和這些對手競爭的實力。台灣是亞洲地區排名第二（營運風險指標）的最佳投資目的地（BERI 風險評估報告），外匯存底居全球第六。
- 綠能是成長中的產業，在未來數十年內將可刺激經濟、創造就業機會且提升台灣形象。南部積極搶佔在太陽能產業的主導地位。美國對中國製造的太陽能產品課徵進口關稅的新政策，對提升台灣太陽能產業的競爭力是一大利多。南高屏陽光充足、土地寬廣，在這些地區發展太陽能產業應是正確方向，也可藉此減少南部的碳足跡。中央、地方政府最近所做的改變似乎顯示了有意推動太陽能商用及家用系統更為普及。風力發電及潮汐發電技術的進步，也是台灣地理與氣候的理想選擇。台灣也應重新審視地熱發電的可能性，相關技術的進步使得地熱電廠可以在不破壞周遭美麗風景的情況下生產便宜、乾淨的電力。
- 繼續努力在發展新太陽能 and 風力發電產業的地區做好「防颱設施」。南台灣日照充沛最適合推動太陽能技術產業。應做好強風、降雨和洪水防治措施，以消弭潛在投資者的顧慮。
- 在南高屏成立太陽能發電中心的議題日益受到重視，對此應繼續推動建立更多台美夥伴關係。這些地區的地理氣候和人文因素都很適合共同合作發展。促進南台灣成為亞洲的乾淨能源樞紐。
- 包括外貿協會、美國在台協會、外交部、經濟部與美國商會等單位與政府機構應協調合作，規劃美國企業帶領更多的商務考察團參訪南台灣，討論投資機會。目

前在推動乾淨、高科技產業及科學園區的計畫應做好完善規劃，以吸引潛在投資者。

- 繼續支持各種措施、低成本融資和補助金政策，幫助傳統石化業進行現代化更新，減少對地方經濟和就業的衝擊；同時給予所需的資源，以幫助他們變得更符合南台灣的環保願景。和那些願意努力嘗試的業者密切合作、嚴懲那些最糟糕的違規業者
- 持續大力促進商業發展。可以不費力、透過單一窗口一次就取得完整的投資訊息對城市吸引新的機會是很重要的。招商訊息內容必須要能引起注意、「行銷」發展的區域。應加強提高招商網的點閱率，可將招商網與城市網站和線上搜尋引擎做連結。確保招商資訊是可以引起興趣的！
- 我們要向提供優質教育的高雄美國學校（KAS）與高雄馬禮遜學校（Morrison Academy Kaohsiung）致意，同時也要讚揚陳菊市長支持這些國際學校！在 Tom Farrell 博士的監督下，KAS 畢業生進入頂尖大學就讀的紀錄非常亮麗。馬禮遜宣佈要在高雄校區增設高中部。優質教育可能是確保取得成功穩健未來的主要方式。持續拓展政府與學術界之間的溝通、合作與承諾，並積極加入產業界的意見，以確保明天的勞動力可以在今天做好訓練。
- 建立開放式學習與教育補助方案，協助在職員工學習新技能使雇主更具競爭力。

# 摘要

## 南台灣未來願景

- 發展需要有**便利的進出往來**、完善方便的大眾捷運系統、順暢的交通以及充足的停車位。
- 持續的全球經濟危機、墨西哥正在進行的反毒品戰爭、準備迎接 2014 世界盃足球賽與 2016 奧運的巴西展現成長的企圖心，以及中國經濟降溫等國際情勢，將繼續突顯對台灣**創造力與商業能力的看重與需求**。如果可以將人才流失減到最低，台灣可以定位本身作為企業進出亞洲的最佳樞紐。
- 高雄的傳統重工業製造基地、台南在歷史文化宗教上的根基、屏東的農業經濟，都正在轉型為**更乾淨、更高科技、以觀光旅遊與服務為基礎的經濟型態**，這將能**促進實質的永續成長與穩健經濟發展**。共同的要件是發展再生能源技術、引進國外投資、促進觀光，以及吸引企業進駐南台灣。
- 促使**傳統產業**成為社區的重要份子，提供資源協助升級，幫助它們轉型為更乾淨的產業。

### ◆ ECFA、TIFA、TPP、WTO

- 《兩岸經濟合作架構協議》（ECFA）實施後又過了一年。美牛進口解禁、台灣加入美國免簽證計畫，以及重啟 TIFA 談判等，都應被視為**對台美雙方非常有益的措施**。進一步採行國際標準與協定是必要的，以更佳利用 WTO 的架構。台灣需要努力爭取加入「泛太平洋戰略經濟夥伴協定」（TPP），同時爭取和更多國家簽署貿易協定。台灣人民充滿創業家精神與創造力，這是令人讚嘆的堅強實力。
- 推廣「Made in Taiwan」成為世界首屈一指的品牌形象，並且加深對國際標準的認識與遵行，這些作為現在比以往任何時候都更重要。想想「Made in Taiwan, Used Everywhere.（台灣製造、全球通行）」。同時，台灣需要建立新的國際夥伴關係，以便在全球市場上更具競爭力。在探尋任何新商機、新夥伴或新投資者時，記住行動技術、乾淨能源創新等領域，以及將台灣定位為通往亞洲的理想門戶等。

### ◆ 提供均衡教育

- 教育訓練可說是確保南台灣成功未來的**最重要的投資**。政府部門與學術界需要明確評估未來勞動力的潛在需求。我們需要可以培養未來技術的工程師、設計師。我們需要會說多種語言的企管人才、導遊、飯店經理人與員工、餐飲業者等。我們需要最棒的美術設計師、IT 專家、軟體開發人員和電腦技術人員等，才能在競爭中立於不敗之地。我們需要**會說多種語言**的公務人員、運輸人員和零售業人員。我們需要的人員能夠清楚表達為什麼他們的產品、城市、活動、場館、工商業區是佈局全球市場的理想選擇。我們需要教育培訓本地學生和交換學生，讓他們畢業後可以留在這裡成家立業，可以在安全的環境中養育快樂健康的家庭。我們應該建立**開放式學習**課程，讓在職員工也能進修提升技能和知識。產官學應合作制定方案，讓那些願意多付出努力進修的員工可以獲得學費補助，因為員工進修提升知識技能水準也能使雇主受惠。學費可根據修得的學分成績按比例補助。
- 投資時間和資源建立**產學合作與夥伴關係**，將給予企業更多的發言權去影響未來勞動力應該如何培訓發展的方式，將給予學生更好的機會找到符合他們技能的工作，將促使學校了解業界人力資源需求所在。
- 持續拓展**地方政府與教育人員對話**的平台，確保教育機構能獲得所需的資源，幫助學生做好職場準備，進入綠色技術、藝術與科學、工程、高科技、運動、休憩與觀光產業等領域。致力於和外籍教育人員建立更好的溝通，未來的勞動人口正在向這些外籍教師學習他們的母語。持續與本地學校和外籍教師合作，確實了解什麼對學生是最好的，以及如何讓更多英語為母語的外籍教師可以提供各種科目的授課，以拓展學生視野，使學生做好充分準備面對未來。促進外籍教育人員更多參與制定新課程。
- **擴展**針對培育觀光旅遊業的課程：包括飯店餐旅管理、國際美食、旅遊管理、演唱會展活動管理、餐廳管理等。
- 考慮投資**幼兒教育（出生到 5 歲）**，因為這些課程的投資報酬率落在 6-10% 之間，投資的成果包括醫療成本降低、犯罪率下降以及勞動生產率提高等。
- 應採納**專題導向學習**以及**全方位評量**學生的方式。只有在毅力、專注力、與他人共事等能力等開發和認知技能相結合時，才可創造具備能力、富有生產力的勞動人口。
- 若要成為真正國際化的城市，我們必須鼓勵、支持**國際學校**。私立學校必須繼續努力展臂協助社區發展，而社區也應展臂歡迎那些致力於為南部孩童建構良好成



長環境的私立學校。公私立學校可以在課程、資源、教職員和想法上進行交流分享，這種做法有益於所有學生。教育人員和市府官員應呼籲大家攜手合作為所有學生提供高品質教育。優質私立學校可以大大增進吸引外商和人才的進駐，同時也成為台灣學生到國外深造的最佳跳板。

#### ◆ 能源與環境

- 再生能源和永續能源將會主導未來數十年國內外的經濟發展。台灣必須把握契機成為**全球乾淨能源產業的領導者**，才能與其夥伴交換意見和技術、開發創新的解決方案，並且輸出更美好的未來嘉惠鄰國。南部擁有發展乾淨能源技術、建置示範計畫和提供整合方案的理想條件。
- 自從日本福島核災發生後，核能就成了更具爭議性的議題。無論台灣未來是否傾向於依賴核電，都需要探究所有可行的能源選項，包括**最先進的核能技術與替代方案**。既然台灣這麼仰賴核能，當然必須要謹慎行事，但也應以開放的心態看待在核能與地熱能領域上出現的新的科學進步與高科技進展。可以把像福島事件的各種因素納入分析的新數據與電腦模型，在建立新設計與系統上是最有幫助的。能源安全與供應安全是至關重要的，成本也是一個重要的因素。台灣可以把這個挑戰視為新契機。發揮創新能力並致力於成為乾淨、安全、可靠能源的典範，然後將技術行銷出去。
- 在乾淨能源發展與觀光旅遊業機會之間取得平衡。這兩個產業應時常溝通聯繫，確保旅遊業的成長對環境的負面衝擊能降到最低。

## ◆ 觀光旅遊

- 開發**優質**旅遊經驗，尤其是目前市場上充斥陸客來台旅遊團。
- 各國觀光旅遊收入平均佔 GDP 的 10%，台灣只有佔 GDP 的 4.6%，因此有很大的**成長空間**，可能開發的領域包括生態旅遊或是其他目標族群，例如同志旅遊。
- 培養**觀光旅遊業**勞動力需要有能保持在一定水準的薪資與易於管理的工作時間表。應善用旅遊科系學生到重要運輸樞紐進行**市調訪查**，使業界可以取得更多意見回饋。

## ◆ 商業發展

- 致力於解決**商辦大樓**空屋率的問題，並新增有完善規劃的商辦與廠辦，提供真正吸引外國投資和台商鮭魚返鄉的好理由。
- 整合公共場所的英日文**招牌標誌**和提升外語的公共服務在今年來說非常重要。距離 2014 台灣國際遊艇展活動日期只剩下 14 個月，時間不多但有很多工作要完成，才能確保我們已經做好準備在 2014 年 5 月迎接全世界。
- 我們生活在**網路與行動通訊**的時代。考慮到這一點就有必要尋找新的方法確保資訊的取得很方便、很清楚明瞭、很靈活、很可靠，且以最新的格式提供。app 行動應用程式服務很方便，可以有各種語言版本選擇，可以很輕易更新，比其其他提供的服務格式，一般街頭民眾最常使用的還是 app。我們不僅需要繼續完善在網站上提供的資訊與呈現方式，更要使資訊行動化。一般筆電、超輕薄筆電、平板電腦、智慧型手機等裝置隨處可見，且每年使用者的人數不斷上升。盡可能以最有效率的方式進軍這個潛在市場。提供 **Android**、**iOS**、**Windows** 系統行動裝置的格式以及線上格式的 app，將可確保最大程度的資訊提供與取得。全球 70 億人口中有 24 億人使用網路。全球智慧型手機使用者人數剛剛越過 10 億，但預計 2015 年前會成長一倍到 20 億。顯然地，如果你想要爭取到最多的觀眾，網路與行動應用程式是最好的方法。
- 開辦單一窗口建立**完整的商業登記系統**，以簡化程序吸引國外投資與新設公司。這套系統應力求便利可行，並且定期更新。為外商投資整合各部會辦公室與資源服務的提供做得很有效率的例子是沙烏地阿拉伯與阿拉伯聯合大公國。
- **分散經貿關係**可以創造強大的金融經濟體，吸收資金流動的衝擊。

- 一些跨國企業已開始將其位於亞洲的區域營運總部分割為更小的**區域樞紐辦公室**。台灣的生活成本低、具有能力的勞動人口與舒適的氣候，應即時爭取這些商機。

◆ 大方向

南台灣必須持續致力於建立並鞏固在吸引國外投資上具備的六大優勢，包括：

1. 優越的地理位置與物流條件
2. 優良的海空雙港與全年氣候舒適宜人
3. 完整的產業聚落
4. 充沛的人力供應
5. 完整的產業交通網路
6. 完整的提供外商良好的食衣住行育樂

# 議題

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## 有趣的數字

對台灣很重要，對南台灣更是關鍵。

**亞洲排名第二最佳投資目的地。**2013年1月17日，台灣經濟部引用美國商業環境風險評估公司（BERI）最近公佈的報告指出，台灣是亞洲地區排名第二的最佳投資目的地，全球排名第四位。BERI是首屈一指的美國研究機構，每年4月、8月及12月針對全球50個經濟體的投資環境和競爭力進行調查評比。BERI去年12月公佈的評估報告中，台灣在亞洲地區僅次於新加坡（78分）拿下72分；中國和韓國57分，並列第14；日本56分，排名第16。這項調查分為三大類，包括營運風險、匯率風險、政治風險等，其中台灣排名分別為第2、第4和第8。台灣的營運風險指標排名高居世界第二位，僅次於新加坡。BERI報告指出其認為台灣政府努力尋求私人資金，有利於公共基礎設施開發項目。整體而言，該研究機構認為台灣的營運風險相對較低，並認為台灣到2017年前應能保持第二位的排名。台灣匯率風險指數排名世界第四位，落後於荷蘭、瑞士和新加坡。該研究機構指出台灣金融情勢穩健，匯率風險相對較低；2012年商品貿易盈餘估計為美金303.4億元，經常賬盈餘為437.7億元，和2011年的287億元、407.8億元相比均為增加。根據前三季的表現來看，BERI預估2012年在台灣的外商直接投資（FDI）將超過美金100億元的目標。BERI預測，台灣將繼續推動外商投資的自由化，以吸引外國投資者。匯率風險將仍然很低，2013年預估全球排名第4、2017年上升到排名第3，並預期將有更多的放鬆管制，以進一步促進外商投資。

經濟部官員表示，台灣政治風險排名從第7降到第8是由於總統馬英九民調支持度持續低迷，以及具爭議性的政策例如油電雙漲、二代健保實施等，造成對國家發展前景投下陰影。雖然台灣政治風險排名在新加坡、瑞士、奧地利、挪威、芬蘭、澳洲、德國之後，但BERI指出其認為台灣政治局勢相對穩定，報告引用馬連嘗試參與自由貿易協定並和中國維持友好關係。該研究機構也指出，台日之間漁權談判有日益增加的良好意願。

**31%的台灣CEO認為，人才限制已阻撓企業可以有效創新；應將注意力特別放在如何提供更有針對性的教育和以後的就業安置。人才流失仍然是一個頑固的問題，阻礙了更多的創新和更強勁的經濟成長。**

**89%**在台灣的公司計劃在 2012 年改變其創新和研發能力；高階主管知道為了能在當今全球經濟體中擁有競爭力，創新、創造力、效率和完善物流是不可或缺的要件。他們明白要在自身權力範圍內提升自主創新和研發能力。台灣工研院 (ITRI) 應扮演更積極的角色，協助台灣企業創新並且幫助他們符合國際標準。台灣的教育界必須更密切和業界接軌，應著眼於當前和未來需求，促使未來的勞力更能滿足產業和商業需求。

**40%**在中國大陸經營的美國公司表示希望遷往他地 (資料來源：美國商業金融公司 Capital Business Credit (CBC) 季度調查報告「全球零售製造商和進口商調查」)。這對台灣和其企業家是極好的機會。和中國打交道以及在中國做生意可帶來胡蘿蔔和棒子。有超過 10 億人口的潛在消費市場吸引了企業到中國投資 (「胡蘿蔔」)；但不斷變化的法規、模稜兩可的法律權利、無法發揮作用的 IPO 法律、語言文化差異等，組合起來就成了相當顯著的「棒子」。對那些不願或不能接受這些和中國打交道以及在中國做生意可能涉及的風險的公司而言，台灣代表了最好的機會。台灣企業家擁有可在中國運作很順利的歷史、語言、文化、經驗和商業意識等。希望和中國打交道以及在中國做生意的美國和日本公司會很好地利用台灣作為一個樞紐，或藉由台灣穿針引線。讓台灣的經驗和 know-how 解決與中國打交道的各種日常難題。讓有經驗的台灣商人管理美國和日本公司的中國廠房。台灣是一個堅持遵守法治的民主政體，在符合美國和日本所接受的標準上，台灣已取得長足。台灣和美日的關係強而有力且日益壯大。由於其地理、政治、社會、文化、倫理的現況，可謂是完美的商業合作夥伴、最佳門戶及完善的樞紐。甚至台灣的好天氣都全年有利於各種活動。

## 教育

*「學校教育的主要目標應該在於培育具備創新能力的人，而非只是可單純重複其他世代已經做過的事情。」 - 皮亞傑 (Jean Piaget)，瑞士發展心理學家及哲學家。*

每一個負面經濟統計數字的背後就是造成我們孩子的損失、對他們的未來增加負擔。兒童不能投票，往往沒有發言權；但他們是未來，**是我們的未來**。在分析經濟和勞動力發展同時，兒童不應該被遺忘。今天他們所受的教育將決定你我未來的繁榮。教科書的學習目標和地方標準的實現，可以跳脫目前現行的框架。這是全球性的問題，不只是台灣南部面臨的議題。然而，在這個競爭日益激烈的世界中，台灣必須密切關注其未來勞動人口的教育問題。世界各地的教育專家和系統架構設計人員都已開始更仔細研究學生學習的最佳方式，這些想法和架構已有各種研究成果發表。雖然在某種

程度上這未免將問題太過簡單化了而且各種論述看法很分歧，但現在是政府把握契機的時刻，哪些政府可以先探究這些想法，那些政府便可以生產出全球下一代的領導人和實力最堅強的勞動力。

### **產學合作與夥伴關係**

為改善、發展地方經濟，對本地企業和教育體系至關重要的就是要經常公開溝通交流。這兩者各自獨立運作既無成效、效率也不彰；但如能透過良好溝通和合作努力使兩者相結合，生產效率將顯著提高。產學合作相互得利的方法有很多種。例如，教育體系可與某一特定企業建立夥伴關係。思科 ( Cisco ) 在沙烏地阿拉伯投資時也成立 NETVERSITY ( 網絡學院計畫 ) ，和公立教育機構合作為當地的學生提供技術、商業培訓。思科也 100% 聘請該培訓計畫的畢業生。南台灣應提出這類型的合作計畫，爭取和高知名度的企業及跨國公司建立夥伴關係協議。已有學校開始實施這種產學合作，例如義守大學，但可以擴展到更多學校。

另一種產學合作的方式是透過諮詢委員會。諮詢委員會負責審查和建立策略，促使本地學校和產業合作。這種聯盟方式有一個很棒的範例是美國南卡羅萊納州「中部地區教育和商業聯盟」 ( MEBA ) 。南卡過去有很大一部分經濟基礎在於製造業，和高雄及南台灣地區很類似。MEBA聯盟匯聚一群產業領導人和教育人士，整合有關學生興趣和地區就業機會等訊息，促使兩者達成最佳合作、彼此滿足對方需求。MEBA聯盟的使命是：透過方案以及產業、學校、院校、信仰和其他社區領袖所建立的夥伴關係，將學生、家長、教育人士和雇主和中部地區的教育、就業機會連結。聯盟的服務向學生即早提供現有的職業生涯選項以及追求生涯目標所需的條件等各種訊息，促使學生畢業後有效融入當地勞動市場、降低輟學率。聯盟的服務還包括為教師學生提供培訓經驗、實地考察、指導、跟隨學習、實習，以及提供各種主題演講人的活動。他們研發各種研習活動提供家長、學生、產業領導人和社區成員參與，例如「未來熱門職缺」、「孩子是你的第一要務」等。有關 MEBA 更多詳情以及可下載的各種資源，請見聯盟網址：  
<http://mebasc.com/resources/>。

有另外兩種方案可為現有的勞動人口帶來直接益處。隨著科技進步，所有製造產品所需的材料、製造方法和專業技術知識也跟著進步。傳統上，現有勞力會隨著經驗資歷累積變得更有價值。然而，我們目前所處的世界不再預期一個勞工可以在同樣一份工作上做到老。各種形式的技術迅速發展導致材料、製造方法和相關知識推陳出新。傳統工人今天面臨新的風險，新科技的問世使其技能過時、

對公司的價值不若以往。大家可能已經開始看到一個令人不安的趨勢，薪資較高的資深工人不斷被更年輕、更精通技術但薪酬較低的社會新鮮人所取代。獲得新知識雖然非常重要，但經驗累積一樣不可或缺。在美國，許多公司實施教育補助計畫，讓員工可以去上和雇主要求的技能直接有關的學分課程。根據員工拿到的成績給予一定比例的學費補助，成績最好的還可獲得學費全額補助。這對學生 / 員工而言是很大的激勵，努力工作、獲得回報。這往往帶給員工更多在公司內晉升的機會。然而，對雇主的潛在利益更是具大。如果經驗豐富的員工可以學習新技能，他們變得更有效率。對那些透過整合新材料或新製程技術來拓展業務的企業更是如此。給有豐富經驗和可靠的員工機會，促使公司更具競爭力或開拓新市場，是雙贏局面。地方和中央政府應考慮補助這類型的方案。如果台灣欲往更高科技、更具競爭力、更環保的方向發展，並希望推動能維持成長和強勁經濟的更廣泛產業，則這是未來值得投資的發展。提高勞動人口的技能，讓那些願意多付出努力的員工擁有公司內部升遷和生涯發展的機會。

舉例來說，高通 (Qualcomm) 可說是其產業內的龍頭之一。隨著行動通訊爆炸性的成長，高通很可能在未來繼續發揮領導作用。高通公司實施上述的教育補助計畫，員工和雇主均受惠。高雄一間公司的主要客戶包括高通；高通有教育補助計畫，這間本地公司卻沒有。這產生了風險。科技迅速發展會不會超越這間本地公司實現利潤的能力？缺乏資深經驗且沒有及時教育培訓的員工，會不會使得這間本地公司無法追上高通需求的增加而削弱其競爭力？沒有自己的研發部門，這是否會導致公司無法在未來競爭，因為它不能滿足所需的技術、材料設計和工程、製造能力等？缺乏知識 / 經驗會不會使這間本地公司輸掉新的商機？我們在這裡想要說的是各界應共同努力採取行動，來培育並且確保會隨著產業進化而積極成長的勞動力。

第二種可以考慮的方案是開放式學習，讓生活有困境、無法進入傳統學校就讀的學生可以選擇替代課程來學習，典型的方法是線上課程。目前已有一些開放式學習課程，但其規模確實需要擴大，以滿足台灣勞動力當前和未來的需求。低出生率=更少的學生=教育體系更少的學費收入=更少的高技能勞工。這應該是我們面臨的最大挑戰之一。如果要預防台灣重要的教育中心關閉，我們需要從海外吸引更多學生來台就讀。台灣也應尋求和海外大學進一步合作的機會，以吸引更多交換學生到台灣，這些學生未來可能會成為台灣勞動市場的資產，帶動創新和具有全球視野的思維方式。應加強學術界和地方機構的協調合作以及海外留學經驗。年輕人 / 行銷人員 / 部落客會是向國際社會宣傳的最佳親善大使。提供外籍學生獎學金是提升台灣大學在全球知名度的好方法。對於那些最能符合台灣迫切需求、促使台灣更具競爭力的外籍優秀學生來台就讀，應考慮給予他們獎學金。

如果南台灣可以形成這些類型的合作夥伴關係，並開設相關的計畫方案，便可提升勞動力的素質，從而吸引知識型產業的進駐，並停止人才流失到北部或海外的情況。

### 零至五歲 = 兒童大腦發展 85%的黃金時期

許多經濟學家、教育家、新聞工作者研究證實，孩子生命中的第一個五年將決定未來的生活和教育潛力。對幼齡兒童的投資可促進效率、減少不平等。南台灣越早擁抱這些努力，就可越早改善勞動力、吸引更多的投資，同時也可提高本地居民的生活品質。這些努力應側重於學習的最有效方法；本質上，就是教導孩子最佳的學習方法。這可提高理解能力和知識的留存、培育創造力，並協助孩童成長時可以吸收更多的知識。

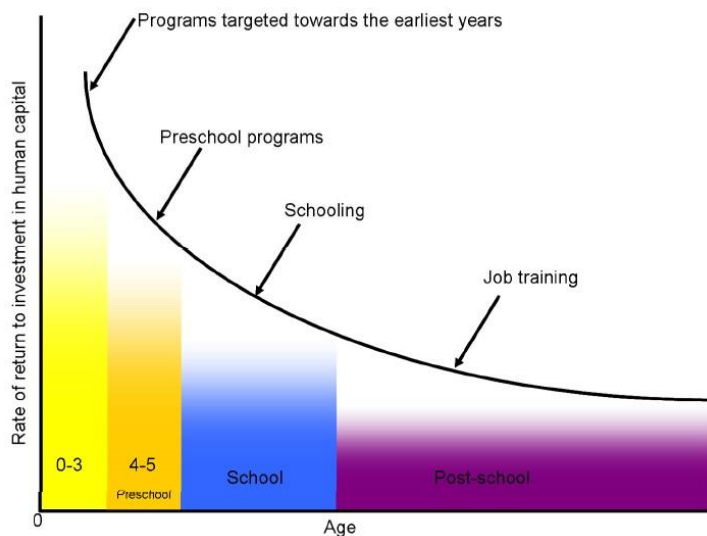
美國「Ounce of Prevention Fund」早期療育基金會指出，幼齡時期沒有接受高品質教育的高風險兒童會產生下列問題：

- 25%更有可能輟學
- 40%更有可能在青少年時成為家長
- 50%更有可能被安置在特殊教育課程
- 60%更有可能無法上大學
- 70%更有可能因暴力犯罪事件被逮捕

詹姆斯·赫克曼 ( James Heckman ) 因其開發人類潛力的研究在 2000 年獲得諾貝爾經濟學獎。赫克曼的研究證實，強調可以測試知識的認知技能開發並不是創造具有生產力公民的最理想方式；相反的，社交能力的開發，例如毅力、專注力、與他人共事等能力等，和認知技能相結合時，才可創造具備能力、富有生產力的勞動人口。這個運動一項關鍵在於必須及早在孩童生命的初期發生。

若能即早在幼齡時期投資孩童社交和認知技能的開發，投資回報率將落在 6-10% 之間，投資的成果包括醫療成本降低、犯罪率下降以及勞動生產率提高等。美國聯邦政府補助的一項研究計畫追蹤芝加哥親子中心的參與者到 26 歲，研究結果發現每支出 1 美元所產生的報酬為 4-11 美元之間。





來源：James J. Heckman 2008

### 專題導向學習

社會大眾和學生受惠於教育系統的深度可以透過將「專題導向學習」( project-based learning ) 融入一般課程教學中來加強。這需要將教科書的內容放在真實世界的背景下，以及學生實際所處的本地社區中。整合各種利用原始和二手文件及資料的專題，例如當地水質分析或建立當地的城鎮歷史等，才能夠真正提供每個科目的背景與意義，無論是科學或是英語學習等科目。這些專題設計可短至一星期或持續一整個學期，單一科目或課程可包含多個專題。對學生而言，專題導向學習有一個重要的面向就是讓學生向同學、老師或社區成員展示其研究成果和學習歷程。這種在專題學習完成後進行討論和口頭報告的方式，可以促進合作，為學生提供明確的場域來整理所學到的知識並分享其學習經驗。有了專題導向學習，學生不再依賴某一來源、死背各自不連貫的事實；而是從個人更深入的層面中來發現教育，透過各種來源把事情的來龍去脈加以瞭解。

### 全方位評量

下一個電視真人實境節目可能會稱為「極限考試」。拋開所有的幽默，這種實境秀就在於全球各地從小學開始，「考試」會越來越極端。考試對學生、教師、行政人員、政府官員和總統而言都是壓力非常大。測驗可以決定學生的自我價值和未來進入哪個學校就讀，可以決定教師的薪水，可以決定行政人員的晉升，可以決定政府官員是否連任，可以決定總統在全球的聲譽。如果這麼多的事情都有賴於考試，就應更重視測驗的實際效率和內容。這在學生身上很常見，在台灣學生學習的核心就是如何通過考試。書本內容硬是死背，考完試後就立即忘記。因此，應側重於知識的理解和留存。

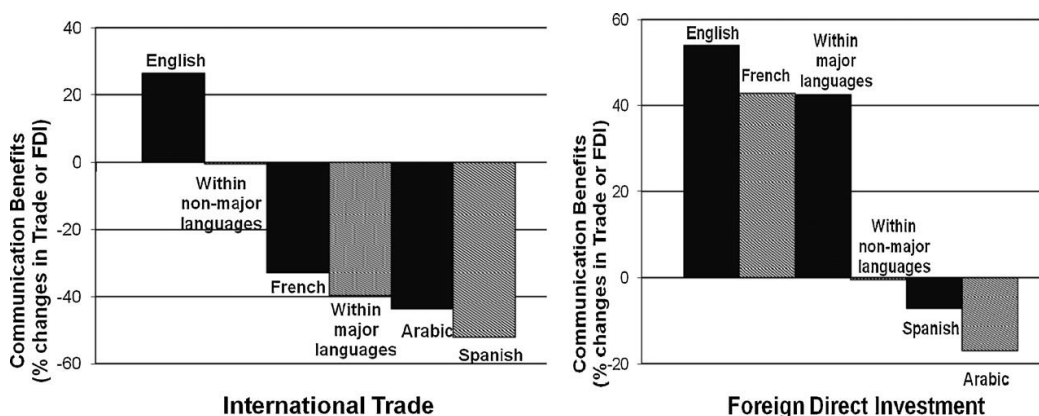
大多數的測驗是明確具體的，不會關注個人需求。考試的要件通常是老師要花多少的時間來打成績，而不是學生如何能夠表達所學習到的知識。政府、學校、社區、家長都需要學習各種「資料探勘」( data mining ) 技術，產業界已經在運用這些技術來爭取、接觸他們的顧客。教育界可運用這些技術促使教育的基本要素，例如知識和增權，可以觸及到每個學生，不只是那些「主流」學生而已。考試應該是學習過程中的一部分，不只是學習的終止。學生應從錯誤中消化、吸取教訓來學習，而不只是寫出正確答案。測驗的結果應有助於每個學生的動態剖析，個人動態剖析應包括行為、過去的興趣和目標抱負等要素。

### 電子書、平板電腦

電子書和平板電腦為學生和教師敞開大門。這些裝置對環境、孩童姿勢很好，並有益於教室中各種不同的學習風格。藉由以手勢操作為基礎的螢幕閱讀器、可轉換各種速度和語言、具備無線點字顯示器、縮放功能、色彩對比度調整等功能以及和耳機相容性等，平板電腦為所有學生提供無障礙的學習。最近，美國許多學區以各種方式探索這項新工具。大多數學校已針對當年度的學生以一對一的方式提供平板電腦，有些則是讓學生就學期間到畢業前可擁有其平板電腦。學生收到電腦前學校會安排說明會，也可要求家長來參加。從技術角度來看，這個方案的執行不應該掉以輕心。南卡羅來納州 Lexington 學區為其學區的所有高中生共 6,500 名，設置平板電腦，透過 1,200 個 Cisco Wi-Fi 存取點 ( 集中管理 ) 來連接，每個學校並配置一名受過專門訓練的技師，來維護平板電腦配置設定等問題，並在方案執行前確認伺服器容量可以因應。21 世紀兒童學習方式和 20 世紀的兒童不一樣，因此我們也不要讓新世紀的教育方式落後。

### 英語、外籍教師

為什麼要學英語？根據 W. Travis Selmier II 和 Chang Hoon Oh 的研究論文「國際商業複雜性和語言國際化」( “International business complexity and the internationalization of languages” ) 指出，英語 ( 在四大主要貿易語言中：法語、英語、阿拉伯語、西班牙語 ) 對貿易和外商直接投資產生最大的影響。( 主要貿易語言的定義為有超過 1 億人說該種語言，並且至少為 10 個國家的官方語言。 )



**主要貿易中的語言層次結構。來源：Selmier & Oh，《Business Horizons》期刊  
2011**

所以這對台灣而言代表什麼？應制定一套完整的英語語言學習課程。應考慮使用教科書以外具有道地英語的真實材料，同時又確保教科書內容側重於實際和實用的英語對話。這種對話應精準地和英語村內容相關。同樣重要的是讓學生能夠以真實的英語來表達自身的文化。在台灣，有良好英語能力可打開更多的就業機會和更高的薪資潛力。既然台灣目標是推動觀光業和服務業的成長，再加上許多台灣企業欲進軍全球，英語是取得成功不可或缺的要件。

外籍教師是學習英語的重要組成部分，因為他們可帶來真實材料、對話和文化。這可激發學生學習英語的真正興趣。有幾種方法可以讓台灣學生接觸到高品質的英語教師。例如，發展一套類似於「Teach for China」（<http://www.tfchina.org>）的方案，或是與現有計畫方案進一步發展合作關係，例如 Fulbright 傅爾布萊特計畫（全面披露：本白皮書共同作者為傅爾布萊特獎助金得主）。這些方案需要本地投資，因此應爭取和企業建立合作夥伴關係，以分擔費用。

與外籍教師相關的更多教育建議如下（謝謝 Darren 提供的想法）：

1. 接納 - 過去在台灣任教的外籍教師的一般印象（導致他們離開台灣的困難）是感覺被排除在外。他們覺得自己像是外部的零件，在一個從不真正感覺到自己受歡迎的系統中運作。糾正這個問題的方法包括增加以英語做溝通、決策、排課、討論、會議、活動、物流、運作等。
2. 課程基礎 - 學生需要加強基本英語技能和能力（字母拼讀、發音、聽力、閱讀等），將基本技能作為獨立的工具，打好基礎才可建立、獲得自信。學好基本功，其他一切才有可能做到。
3. 課程指引 - 課程宗旨及目標、意見溝通及回饋等呈現的方式往往是模糊不清或反覆不定，導致留下疑問或混淆的概念。以英語紙本方式呈現課程宗旨、目標、規定和回饋等，可作為外籍教師指南手冊與參考。如果

地方學術單位並不清楚應納入什麼樣的宗旨使命，應該和外籍教師緊密合作，協助制定一個明確、可以達成的宗旨目標，這對未來任何新進外籍教師都有助益。

4. 課程支援 - 教室教學場所雖然適合上課學習，但功能性的材料（flashcards 快閃字卡、worksheets 學習單等等）卻有限，無法協助班級達成學習目標。這就好像有電腦（硬體）卻沒有任何有用的程式（軟體）來生產。

這些要件可作為好的起點，協助學生和教師建立更好的教育經驗和成果，以及支援、改善課程，使課程可以永續運作。

### 中止人才流失！

最近公佈有關台灣就業的兩組數字表明了一個根本問題。這些數字非關勞動力市場，而是和教育、社會、經濟的發展更有關。2012年12月，政府每月公佈的就業報告顯示失業率下降到4.18%，和11月相比改善了0.09個百分點。儘管數字有所改善，但青年人口和高學歷人口的失業率卻在上升。此外，一家顧問公司的調查報告顯示，69%的受訪公司預期一些員工會在2013年到台灣以外的地方，尤其是中國尋找工作機會，另外也包括到香港和新加坡。雖然4%左右的失業率並不是特別高（尤其和全球失業率相比），但更多的青年人口和高學歷人口失業的事實卻令人擔憂。這可能意味著雇主傾向於雇用較年長或有經驗的員工，或是勞動市場提供的工作不符合年輕人的期望，年輕人選擇不接受那些不想要的工作機會（學校體系和業界夥伴關係的重要！）。

這樣的問題我們不用看很遠只要看看學生就能找到一些答案。他們當中有許多人是大學畢業生，他們父母的生活可能比祖父母的更好。這表示學生畢業後找工作的壓力要少得多，而且將待業期延長等到有理想工作上門，也不會對他們造成負擔。教育系統本身也是造成勞動市場失衡的原因之一，雇主無法找到合適的員工，而年輕人也找不到合適的工作。經過十多年的教育改革，幾乎所有的高中畢業生現在可以上大學，這是因為許多院校已升格為大學。從中等教育的層級來看，職校培訓不再那麼受歡迎。原因顯而易見：現在的父母通常不需要兒女即早進入就業市場以減輕家庭的經濟壓力。今天，更多的家長寧願孩子上大學，因此普通高中是他們的首選。

當然大學教育不光只是在提供職業培訓，但台灣已有許多產業營運遷至海外，這種經濟體可能無法支援年輕的大學畢業生，以及許多年長、更有經驗的勞工。這說明為什麼許多台灣人轉向海外尋找工作機會。上述的顧問公司在其最新調查報告中指出，台灣勞動力的流動性很大，台灣人才在大中華地區有很高的需求。例如，中國電信巨頭華為去年在台灣推出一個大型招募人才活動，目標是要延攬幾千名專業人士。台灣液晶面板產業也因中國競爭對手挖角而失去了很多中高階經理人和工程師，這真正危害了台灣高科技產業的創新能力和競爭力。

的確，中國可能是那些對台灣就業情況不滿意的求職者一個好去處，尤其台灣薪資水準一直停滯不前。中國的快速崛起充滿各種大有可為的機會。當然，這些機會也伴隨著風險。已有人指出，中國雇主延攬台灣人才是想要學習其技能，一旦習得技倆後台籍員工便被請出門了。這也許是真的，但台灣的情況已到了讓求職者即使冒這些風險也要到其他國家工作。

上述顧問公司指出，人才外流會進一步惡化台灣專業人才短缺的問題。這將損害國家經濟發展，因為若無法找到足夠人力資源時，會使國內外投資者卻步。

越多的人才出走，台灣招商引資成功的可能性就會更少。政府必須制定措施，制止這種惡性循環。

### **私立學校、國際學校**

私立學校和國際學校是社區很重要的一部份，他們有能力用更多的經費購置教材、聘請教師和舉辦活動，這顯然有利於學生。但透過大量的敦親睦鄰活動和社區推展課程，這些學校也有助於提高整體學習水準。私校和國際學校往往很願意分享經驗，促進廣大市民的福祉，但這樣的資源卻常常未被發掘。

### **觀光旅遊**

著名旅遊指南出版社「孤獨星球」(Lonely Planet) 票選 2012 年前十大最佳旅遊國家，台灣名列其中。CNN 生活旅遊網 CNNGo.com 選出 2012 年全球十大最美自行車道，台灣中部的日月潭環湖自行車道也入選其中。該網站也刊出亞洲十大最佳街頭小吃城市報導，將台北名列其中。對南台灣觀光旅遊業最棒的事情之一莫過於高鐵通車。另一個有助於觀光業的新聞是《國家地理》雜誌公佈將台灣高鐵之旅列為 2013 年全球冬

季十大最佳旅遊去處之一。南台灣需要獲得更多的曝光率，因此必須努力讓南台灣之好可以出現在更多各種媒體上。

遊客到南台灣觀光旅遊有各式各樣的原因，包括體驗罕見、多樣化的動植物生態，以及探索南台灣在亞洲的真實歷史文化意義。觀光局已經開始推動數個「聚光燈」旅遊景點，其中包括南台灣的恆春半島。觀光局的總計畫將南台灣定位為歷史主題，指引遊客到傳統民俗及原住民文化場址、參加宗教慶典節日，以及參觀歷史文化名城等。

台灣觀光旅遊業收入佔 GDP 的比例從 2000 年的 1.2% 增加到 2011 年的 4.6%，成長幅度驚人，但全球觀光旅遊收入平均約佔 GDP 的 10%。雖然在台灣傳統旅遊業可以看到強勁的增長，但投資於高品質觀光旅遊才是長期成功的關鍵。當初開放陸客來台旅遊的政策僅限於團體旅遊。規劃這些團體旅遊的旅行社非常積極爭取對他們最有利的價格，其結果很典型：低掛的果實很容易摘得到，但絕不是甜美的，甚至往往是苦澀的。已嚐到苦澀果實的是飯店和餐廳業者，他們必須在兩者之間做抉擇，看是要降低價格和品質來爭取團體陸客，但卻很可能因此流失原本客源；或是選擇維持原來價格和品質，而放棄陸客這塊吸引人的市場，同時現有客源的規模可能會停滯不前。

另一個有趣的統計數字，是政策開放後第一年團體陸客蜂擁而至，但平均花費（不包括飯店住宿和團體用餐的費用）只有約新台幣 1,000 元（約\$33 美元），這個數字對帶動一個產業的成長而言實在少得可憐。南台灣沒有忘記這樣的教訓，現已著重於吸引有較多可支配收入的陸客來台，而不再單純招攬大量的團體客。南部新的發展趨勢是著眼於吸引想要有深度豐富體驗的優質遊客，而不是一般標準走馬看花的巴士旅遊團。觀光旅遊業的模式各有其優缺利弊，但最好的策略是要保持一致，並從中開發主力市場。要同時採納兩種模式會很複雜，但不是不可能。即便如此，還有另外兩種相對較新的旅遊模式是台灣可以採納的。

### **生態旅遊**

生態旅遊對南台灣而言是非常可行的觀光旅遊模式，因為南部豐富的生物多樣性和整年氣候宜人。南台灣充滿各種生態、文化特徵優勢：山脈、海灘、國家公園、野生動物保護區、原住民文化，以及種植新鮮水果的廣闊田野等。在南部可從事絕佳的賞鳥活動（超過 440 多種鳥類！）、爬山健走、潛水等，還有其他

融入大自然的活動不勝枚舉。對生態旅遊有興趣的遊客旅遊意識高且願意支付較高的價格，以確保不會對地球資源和人類族群造成負面影響。

有一個可以探究的模式是「&Beyond」。&Beyond 是世界知名的豪華探險保育旅遊集團，成立於 1990 年，是旅遊業的先驅。該組織著名的特色是有一群知識豐富、訓練有素的專業人員和導遊。不少旅遊業者甚至派員工到 &Beyond 接受培訓。最初他們一直經營非洲旅遊，但在 2005 年 &Beyond 和印度泰姬酒店及度假集團 (Taj Hotels Resorts and Palaces) 成立合資企業，推出頂級豪華遊客可探索野生動物和國家公園的旅遊。有關 &Beyond 永續旅遊模式的更多訊息，請見：

[http://www.andbeyond.com/sustainability\\_with\\_andbeyond](http://www.andbeyond.com/sustainability_with_andbeyond)

台灣可參考的另一種模式是秘魯的 Inkaterra 生態旅遊組織。在生態旅遊一詞尚未出現前，Inkaterra 早在 1975 年便開設第一間雨林小木屋。Inkaterra 已獲得聯合國全球環境基金的援助貸款，其生態旅遊模式承諾依下列原則運作：

1. 在尊重與支持秘魯多元性及文化的情況下拯救秘魯的自然資源
2. 透過尊重文化、社會、環境價值以自給自足的永續旅遊產業來取得保育科學研究
3. 給予獨特、自豪的秘魯專業人士能成就一番事業的方法，同時又能珍惜所處的土地資源
4. 發掘秘魯資產，將其轉換成世界一流的產品與服務
5. 透過旅遊經歷，為遊客創造會在他們心靈產生共鳴的回憶

Inkaterra 刻意吸引比 &Beyond 目標客群更廣泛的群眾，包括學生和研究人員，因為他們致力於對秘魯生態系統的進一步認識，在維護秘魯引以自豪的資源的同時，也能永續經營、維持收入來源。有關 Inkaterra 永續性承諾及政策的更多訊息，請見：

<http://www.inkaterra.com/en/about-us/sustainability-policy>。

生態旅遊產業可以永續經營的關鍵因素在於知識的傳播。當地居民必須了解環境保護的最佳方式，並且能夠將這樣的知識引導、告訴遊客。執行保育工作可能很困難，所以最好是依賴市場機制，並嘗試將各種不同的利益協調一致。如果當地居民可以從生態旅遊產業中獲得謀生的方法，而不是靠消耗自然資源的產業來謀生，這樣才會有動力保護生態資產。系統化的知識也可為這個產業創造收入來源，例如遊客可以購買 podcasts、導覽旅遊、互動式 DVD、CD、當地動植物圖鑑、地方文化簡介等。

## 同志旅遊

同志團體中往往消息傳遞迅速。台灣最近（2013 年 1 月）躍上紐約時報的頭版，內容是探討台灣可能成為亞洲第一個同性婚姻合法化的國家，報導也指出有五萬人參加台北的同志遊行（2012 年 10 月舉行），成為亞洲規模最巨的同志大遊行。亞洲尚未成為同志族群旅遊或居住的熱門區域，因為同性戀過去被歸類為精神疾病，中國直到 2001 年才對此做出改變，亞洲其他國家也有類似的故事。由於同性戀仍是禁忌，對於同志消費者市場台灣也許並非很積極在宣傳；但既然國際社會可能視台灣為更包容、更進步的社會，我們應該讓數字說話。荷蘭 Out Now 市調行銷顧問公司預測，2012 年全球 LGBT 同志族群休閒旅遊業創造美金近 1,650 億元的營收。台灣擁有熱情友善人民的美譽，應能接受同志旅遊業帶來更多的收入。

## 徵人啟事：觀光旅遊業勞動力

阻礙觀光旅遊產業穩健成長的一個關鍵因素在於缺乏知識經驗豐富的從業人員。雖然熱情好客非常重要，但光靠這項特質是不足以在台灣建立一個強大的旅遊產業。來台旅客人數在過去六年來幾乎增加了一倍。如果旅遊業成長的速度繼續比合格從業人員的數量來得快，這個產業將會動搖。

雖然每年約有 25,000 名觀光旅遊科系的畢業生，但其中只有約 40% 會投入這個行業，主要是因為工資低、工時長且工作不定時。根據勞委會統計，旅館基層員工的月薪大約介於新台幣 25-30K（835-1,000 美元）；旅行社新進人員頭五年的薪資大約每月 23K（765 美元）；導遊人員平均月薪為 34,800 元（1,160 美元）。除了薪酬低的因素，再加上工作時間往往在一般正常上班時間以外，也使得旅遊從業人員的社交生活壓力大增。農曆新年是說明這個產業工作壓力的明顯例子。傳統上，農曆新年長假期間闔家團圓圍爐。然而，近來的趨勢是許多家庭選擇到餐廳圍爐以及出外旅遊。這使得農曆假期成了餐廳旅館員工一年當中最繁忙的時期。隨著越來越多外國人選擇這個時間到台灣旅遊、過年，巴士、導遊的需求量增加。雖然當中有大量工作不需要專業技能或與遊客互動，但越趨成熟的產業會帶來了更多樣化、財富更雄厚、要求更高的消費者。

儘管這個產業勞動人口的質量和數量都有提高，但許多頂尖從業人員正被吸引至香港、新加坡、中國大陸等地方，因為在那裡這些頂尖人才的技能可以為他們賺取更高的薪酬。觀光局在 2010 年設立每年補助約 100 名合格觀光旅遊從業人員的精進訓練計畫已有不錯的成果，但還需要更多。這個計畫應該配合地方和中央政府經費擴大辦



理，提供高品質的培訓。此外，應要求觀光旅遊科系學生到機場、高鐵站、捷運站地點，分發旅遊體驗調查問卷，對同意填寫問卷的遊客給予小禮物。問卷內容應調查來台旅客喜歡什麼、不喜歡什麼、參觀了哪些景點、來台期間最棒的體驗是什麼，以及認為需要改進的地方等建議。航空公司也應參與這樣計畫，可提供定期抽免費機票的活動，讓填寫問卷取得資格的遊客參加抽獎。

### **成為令人滿意的觀光旅遊目的地需要具備哪些條件？**

最近筆者到越南和柬埔寨各為期一週的假期可以提供一些有趣的觀點。越南 GDP 為 1,239.6 億美元，每年到訪遊客約 684 萬人；柬埔寨 GDP 為 128.8 億美元，每年到訪遊客約 200 萬人。儘管有這些統計數字和一定的旅遊期望，我在柬埔寨的旅遊體驗卻比在越南的好多了。那麼，是哪些條件造就令人滿意的旅遊經驗？

一個關鍵因素在於旅途中可以學到什麼。越來越多人希望旅遊結束返家後能告訴朋友在異鄉的新奇體驗，而不只是海灘上沙子的顏色。發掘不為人知的事實有助於創造一個更好的體驗。在柬埔寨，他們透過語音導覽用故事呈現當地的歷史文化，而不是透過導遊用蹩腳的英語開美國人的低俗玩笑；後者卻是在越南有時碰到的情況。

此外，第一印象至關重要，而機場是給遊客建立第一印象的地方。在越南機場辦理落地簽證的過程相當混亂（沒有英文指示標誌），你只能排隊抱著希望最後會等到你的簽證。沒有人喜歡飛行，所以你能猜想得到，隨著越來越多的班機落地，越來越多困惑的旅客聚集在一起。一套有效率、明確的處理系統搭配熱情歡迎的臉孔和全面的城市資訊介紹，會給予準備開始度假卻有些不安的外地遊客奇妙的力量。這裡要特別說明，以上的例子並不是意指入境台灣是不愉快的經歷；但從上述的例子我們可以得知，越明確、越有效率的簽證辦理，就可以使入境過程壓力越小、旅客就越能感受到更快展開他們的假期或商務行程。

最重要的是，許多遊客對異地的人民、美食都很好奇，不是只想買紀念品而已。在越南，往往我和當地人交談不到一分鐘他們就會問我是不是要買點什麼。在柬埔寨，等我想通要買點什麼東西之前，我可以和他們聊聊在做什麼、他們的家庭，當然還有當地天氣等等。一旦旅遊從業人員接受培訓後，台灣人擅長先閒聊一番的能力不應被低估。當然，人們最不想要有的體驗就是落入旅遊購物陷阱的環境。在這方面，台灣人的友善和很自然願意伸出援手的態度，都有助於建立良好的印象，實際上也往往帶來更多的銷售成果。

有關觀光旅遊的最後一點，遊客喜歡盡量體驗異國情調和新奇的人、事、物、風景、食物、文化等。然而，有時候他們也會想念家鄉舒適的熟悉感。因此，很重要是可提供各種適當的國際性飯店、餐廳、商店等，以滿足思鄉之情；有時思鄉之情得不到滿足可是會使旅客在假期結束之際感到不滿意。與其聽到遊客表示「玩得還可以，但我真的開始想念家裡一些平常的東西」，到不如是聽到遊客說：「這趟玩的真棒！而且就在我很需要的時候，就發現這家很棒的漢堡餐廳！」

## 外商直接投資

### 為什麼是台灣？

以《世界是平的》(“The World is Flat”) 著作知名的作者湯馬斯·佛里曼曾表示：以前經常有人問我：「除了你的祖國外，您最喜愛哪個國家？」我的答案一直都是：台灣。人們跟著會問：「台灣嗎？為什麼是台灣？」我的答案很簡單：因為台灣本來是一塊儘是岩石的不毛之地，沒有天然資源，夏季又常有颱風襲擊。它甚至要從中國進口建築用的砂石。但台灣卻擁有世界第四大的外匯存底。因為台灣的 2,300 萬人，無論男女都努力「開採」並非地下的礦藏，而是他們的才能、精力與智慧。我總是告訴我的台灣朋友：「你們真是世界上最幸運的人。你們為什麼會這樣幸運呢？你們沒有石油、沒有鐵礦、沒有森林、沒有鑽石、沒有黃金；有的只是少數幾座小型煤礦和天然氣礦場。但正因為天然資源如此貧乏，你們利用自身的傳統習慣和文化開發人民的技能，這些都變成了當今世上最寶貴、也真正是可以「回收再生」的資源，你們怎麼會這麼幸運呢？」

### 美國商會亞太理事會 (APCAC) 二十年來首度來台舉行年度大會

2013 年亞太區美國商會年度大會 (2013 APCAC Spring Conference) 將在 3 月 21 日至 22 日在台北君悅大飯店舉行。來自台灣和整個亞洲地區以及美國的高階經理人和其他重量級的貴賓將齊聚一堂進行交流，並深入探討跨國產業所面臨的主要問題。大會議程包括綠能、產業、建築等專題；國際經貿：自由貿易協定和區域貿易協定；21 世紀的醫療保健；版圖重整：聚焦亞洲供應鏈；創新時代：保護創新與創意成果等。在此恭喜主辦單位以及台北美國商會，台北美國商會也將在大會慶祝晚宴上一併舉辦年度的謝年飯。

### 台灣加強營業秘密法

一月通過的營業秘密法修正案對於相關行為增訂刑事責任並加重處罰，此舉是為預防洩漏營業秘密之行為。根據通過的修正案規定，對於竊取、洩漏營業秘密以圖利

個人者，最高可處 5 年有期徒刑得併科新台幣 1 百萬元至 1 千萬元之罰金 ( 34,500-345,000 美元 )。對於竊取、洩漏營業秘密並至台灣境外使用者一旦確認有罪，更加重處罰為最多 10 年有期徒刑，得併科新台幣最高 5 千萬元之罰金。根據經濟部智慧財產局，如果所得利益超過罰金最高額時，法院並得於其所得利益之 2-10 倍範圍內酌量加重處罰。這代表台灣的另一舉措為使在台灣做生意以及和台灣廠商打交道的環境更為安全，這對於台灣一直努力建立並已取得的良好聲譽，又應能增添亮麗的一筆。因此，台灣成為一個適合做生意且更具競爭力和吸引力的地方。

南台灣有很多可以吸引跨國公司和美國小型企業的地方。重點的是要讓企業總部員工或小企業主到南部考察，親自看看人民和產業可提供的特色。南台灣可利用其競爭優勢給予商務旅客具體專案和投資激勵措施，例如產品創新或初期設立所需物料可減免進口關稅，這些考察團返回後便可向企業總部宣傳。每個造訪南部的業者離開時都應表示：「他們可提供的正好完全符合我們所需。」眾所周知，經貿關係的多元化可以創造強大的金融經濟體，吸收資金流動的影響。台灣具有內需帶動的健康經濟成長，若再搭配多元、分散的經貿關係就會更好。

### **從地理位置上分散經貿連結**

分散經貿關係有一個很棒的做法是拓展和蒙古及緬甸等亞洲國家的商務關係。2012 年，蒙古是全球經濟成長第二快的國家。同年，美國總統歐巴馬訪問緬甸，具有歷史性的意義。此外根據《經濟學人》公佈的「2013 年亞洲商業展望調查」，18.4% 受訪者表示目前有大量投資或適度投資在緬甸，34.4% 表示仍在觀察評估。

在這個調查報告中，在跨國企業缺乏去投資的意願 (「沒有計畫去投資」) 上，緬甸和台灣同樣獲得 30%。這個數據可能代表了台灣和緬甸不應該將所有雞蛋都放在跨國企業的籃子中，而是應該互相給對方一些雞蛋。

冰島加入歐洲經濟區後是其成功吸引外資投資於能源產業的因素之一，因為冰島國產的能源大部分是出口到歐洲市場。東亞和東南亞地區對台灣也能帶來類似的好處。

### **就像數 123 一樣容易**

美國商會先前的白皮書也提到一個關鍵要素，對外商要在台設立公司所適用的法規條例以及所需完成的申請流程等應彙整到單一部會辦理。該部會應位於某一地點的一間辦公室內，雇用的人員具有極佳的語言和研究能力。該辦公室應致力於成為投資

者資訊交流中心，隨時可提供各種經濟研究報告。這間辦公室是投資者和台灣政府之間的單一連繫窗口，應要提供快速、可靠的服務，協助投資者無障礙取得從電信到銀行等各種服務的來往，這樣才是成功運作的辦公室。地方政府也應派代表到這間辦公室，以便有效整合潛在投資者與地方中央官員的各種相關資訊。在其他如巴林和阿拉伯聯合大公國等國家已經成功招商引資的主要方式，是允許外國公司在某些產業能獲得 100% 的所有權，並且提供和投資者母國模式相似的明確法規架構。提高外商在台設立公司的容易度將有助於引進新技術與 know-how 到台灣，促進經濟多元化，並可提供就業機會、創造穩定。

### **南台灣作為外國人的家**

潛在的外國投資者會來南台灣投資很重要的關鍵在於他們把南台灣視為真正的家，是一個他們可以享受生活、家人可以成長茁壯的地方。西方管理階層往往從其國內市場成長疲弱不振的角度來看商機所在，因此無法發掘他們當地的機會。然而，西方企業已經體認到未來成長的區域最有可能是亞洲，因此有越來越多的高階經理人派駐至亞洲。2008 年，19% 的西方企業有董事會主要成員位於亞洲；這個數字現已上升到 38%。到了 2017 年預期會增加到 52%。

在台灣南部，從海灘去到山上只要幾個小時的時間，無論你喜歡什麼樣的休閒活動，台灣可說是四通八達。同樣重要的是外國人返回自己國家所需的旅行時間。商人不會希望搬到太偏僻的地區，萬一錯過飛機航班還得多等 24 個小時才能返回家鄉。他們也希望家人朋友來探望時可以很方便，不需要轉機五個機場才能到得了。因此進出該地區有高效、便利的航空運輸是非常重要的。外國人在南台灣可擁有的生活品質也非常重要，包括國際美食陣容、娛樂選擇、國際學校、安全、社區生活等。南部美食非常棒，但的確還可加強國際美食選擇陣容（更多細節請見「台灣小型企業」章節）。夜生活娛樂選擇也很零星，因為夜晚要找到各種負擔得起的交通方式可能很困難。有一個很棒的作法是開發具有獨特主題的社區，並有一個主要的地方提供夜生活娛樂活動。海洋文化流行音樂中心完工後應該成為這樣的地方。南台灣藝壇在組織和宣傳上都做得很好，在這裡也看得到世界級的展覽，使得此地外國人可以和台灣以外的文化連結。因此，愛河 / 港區一帶將彙集這一切，成為藝術兼容並蓄且很方便的地方。

### **企業鮭魚返鄉**

我們在過去十年來已經看到無法再依賴大量廉價勞工作為商業模式。公司正在尋求技術上的投資以取得永續成長。南台灣應該抓住這個機會，因為台商的海外投資有70%最終還是在中國大陸；這樣大量的投資應該可開始回流到台灣。根據麥肯錫《McKinsey on China》最近的 podcast 內容指出，台灣 2,300 萬人口中有 150 萬人長住中國或是經常往返中國。台灣是中國境內第二或第三大的投資者，台灣對中國的投資金額官方數字為 1,000 億元，非官方估計約高達 3,000-4,000 億元。

台灣政府提供各種獎勵措施吸引企業鮭魚返鄉，為營運中心設於海外的台商舉辦的一些說明會就吸引了 400 多人。螺絲大廠晉禾集團就率先回台投資新台幣 100 億元（333.3 百萬美元），規劃將在高雄阿蓮工業園區建立一座廠房。

經建會為促成台商回台投資於 2012 年 11 月 1 日推出新方案提供新台幣 100 億元（333.2 百萬美元）額度的專案低率貸款。該方案執行期間至 2014 年，對於企業在台設立新廠房將調降設備進口關稅。此外，該方案也提高外勞核配比率，參與方案的企業可增聘 15%-20% 的外籍勞工，惟上限不得超過總員工數的 40%。申請該方案者有一些適用條件，完成投資後須創造本國勞工就業人數達 100 人，且高科技產業在本地專案投資金額的自有資金須至少為新台幣 5 億元（1,660 萬美元）以上，其他產業則為新台幣 1 億元（330 萬美元）以上。該方案主要適用對象為具備自有品牌國際行銷且屬高附加價值產品等產業的台商。

該方案預期將會促成台商回台投資新台幣 2,000 億元（670 億美元），增加創造總體產值達新台幣 3,030 億元（101 億美元）。此外，到 2017 年底前將為台灣勞動市場創造 82,000 個就業機會。

### **南台灣應擁抱的趨勢：成為亞洲區域樞紐**

由於亞洲的快速發展，跨國企業已開始將其位於亞洲的區域營運總部分割為更小的區域中心。傳統亞洲樞紐城市因為高房價和生活成本而變得非常昂貴，好的國際學校名額也漸漸滿了，並且開始疲於應付人力不足的問題。南台灣可以很輕易為公司減輕一些費用負擔，但仍應致力於發展健全的國際學校和教育體制，確保可建立富有創新能力的生力軍。南台灣也應繼續努力為南部建構一個令外國人想要將其家庭遷移至此的環境。為成為區域樞紐，南台灣必須致力於使其成為旅遊進出便利的地方，具備符合國際標準的就業法規和金融制度，並提供更多樣化的國際美食和品牌購物的選擇。

### **平衡乾淨能源產業發展和生態觀光**

台灣應同時追求乾淨能源發展和環境永續發展，為生態旅遊產業採取雙管齊下的方法。傳統上，一旦一個區域被規劃作為能源發展，其獲得觀光旅遊收入的價值就隨之下滑。這是因為發展乾淨能源可能會帶來景觀視覺上大規模的負面衝擊，使景觀地貌發生不可挽回的改變。台灣欲開發地熱能源，除了傳統鑽鑿探勘之外，台灣應研究其他替代探勘方式，因為由鑽孔排出的硫化物和其他礦物質會改變電廠周圍環境的顏色。此外，傳統鑽孔探勘會產生大量噪音，再加上較老舊的地熱能技術衍生的負面影響，這意味著這些發電廠應設置在遠離城市、人煙稀少的地方。然而，新的技術正在開發，將改變台灣發展地熱能的能力，使其能保有自然美景。

冰島可作為這些產業的典範例子。在此也要特別指出，儘管生態旅遊產業創造的季節性工作較不穩定，但能源開發計畫創造的大多數就業機會是侷限在施工階段，因此這兩者必須取得平衡。此外，發展觀光旅遊業涉及很多變數，需要跨部會和跨產業的協調，這些變數可能很難控制。發電產業不應擔心是否能在一個區域發展新廠房設施，而生態旅遊產業不應擔心能源產業是不是會對一個區域造成影響。在台灣南部推動能源和生態旅遊開發案時，關鍵在於跨產業的溝通、協調合作，並同時考量所有相關利害者的環境、社會和經濟價值。

### 酒醉駕車

南台灣在努力擴展觀光貿易、招商引資和提高生活品質的同時，也必須盡力以道路安全為首要考量。很高興看到中央政府採取更有力的措施來改善道路安全。高雄應在執法面上起帶頭作用。2013年1月14日，台灣立法院通過修訂《道路交通管理處罰條例》，對酒精或管制藥品影響下的駕駛人加重處罰。根據修訂的條例規定，對酒駕、吸毒駕駛之處罰提高50%至最高新台幣九萬元（\$3,113美元）；五年內再犯者將自動處以最高罰鍰。對於不依指示停車接受稽查和酒精測試者，將處新台幣九萬元罰鍰，並當場扣押其車輛、吊銷該駕駛執照及施以道路交通安全講習。計程車隨處可見，捷運公車路線的改進，再配合輕軌、快速公車系統的興建，替代性交通運輸應該要既方便又負擔得起。夜店、酒吧應考慮提供免費的不含酒精飲料給指定駕駛，作為一種社區服務。另一種可進一步誘使駕駛人避免酒駕的方法是給予停車優惠，降低停車費的上限，並且提供兩趟計程車的折價券（一趟用於當天返家，另一趟用於隔天回停車場取車）。

### 菸草業

以下章節內容是我們持續在南台灣進行產業研究所獲得的資訊。高雄美國商會將這個主題納入白皮書中，以反映台灣眾多具有廣泛影響的行業之一。菸草主題已變得越來越政治不正確，因為來自不同團體的壓力大增。然而，這是一個非常複雜的議題，涉及不得人心的活動、健康問題、稅收、經濟影響等層面。無論你的立場如何，這個議題都會影響你。

### **採取溫和、規律調漲菸稅的政策**

菸草業支持溫和、規律調漲菸稅的政策，這將有助於政府實現維護公共健康和增加稅收的目標，並且不會助長私菸貿易。新加坡和馬來西亞因為在菸稅課徵上的失衡策略導致許多不良後果，後來政府採取相關措施有助於問題的修正。自 2005 年以來，新加坡已凍結菸稅的課徵；在此之前星國政府曾連續大幅調漲菸稅，導致菸品走私流竄市場，估計私菸市佔率約 25%。加強緝私的確遏制了菸品走私的增長，並使得合法菸品市場復甦。然而，和大幅調漲菸稅之前的幾年相比，2011 年黑市私菸的交易量仍然很嚴重。馬來西亞的情況則是經過數次調漲後的菸稅幾乎是通膨率的 10 倍，導致馬國也面臨私菸市佔率 36% 的問題。今年，馬國政府決定不進一步調高菸稅，轉而加強緝私。有明確跡象表明，這項政策的改變開始奏效，捲菸稅收已獲得改善。

2002 年台灣開徵菸品健康福利捐，在新台幣 11.8 元的菸稅以外再加上每包徵收菸捐 5 元。自 2006 年以來菸捐已增加 300%，總計目前菸捐為每包菸新台幣 20 元。有強烈跡象顯示，這種大幅調高菸捐的政策在無意中已助長私菸貿易，導致菸稅收入的減少並對合法菸草業造成損害。根據中華民國菸業協會委託的獨立研究機構在 2011 年進行的調查顯示，台灣捲菸市場中免稅菸品佔 4.7%，所謂的「白牌菸」佔 5.6%。大多數的白牌菸是透過混入合法菸品中走私進口，逃漏健康捐和菸稅。這項調查顯示走私白牌菸的市佔率從 2010 年 5.2% 上升至 2011 年 5.6%。政府承認大幅增加的健康捐無意中已助長了不受管制、逃漏菸稅菸捐的「白牌菸」銷售量。

為滿足政府財政稅收和公共健康目標的利益，我們建議政府在考量和菸草業有關的作法時，採取公正態度全面了解所有的事實：

1. 對目前的菸稅考慮做任何改變時，能將私菸貿易的潛在衝擊一併考慮。
2. 考慮採取溫和、分階段調漲菸稅的政策，並將通膨率納入參考。
3. 加強緝私行動，對私菸交易加重處罰，包括旅客攜帶超過規定數量的免稅菸品入境台灣。

4. 與所有利害關係人進行全面溝通，避免在打擊私菸行動上採取無效的措施。

#### **加強執法，而非頻繁修法**

不斷提案修改「菸害防制法」已經對菸草零售環境帶來許多的不確定性。2011年，提案修改的內容包括菸盒的警示圖文比例再擴大、普通外包裝、販菸場所全面禁止菸品陳列展示、全面禁止菸品添加特殊口感等。雖然沒有可靠證據顯示上述擬採取的措施做法將有助於政府降低吸煙消費，但卻有可能產生負面、意想不到後果的顧慮，包括助長私菸貿易、妨礙競爭、剝奪菸商的合法智慧財產權等，因而阻礙合法菸品的零售交易。

在考慮立法新規定前，特別是法規可能構成任何法律或財政風險時，當局應先確保現有法規的充分執行。例如，澳洲政府迅速通過實施一個菸品盒普通外包裝的政策，該政策未經證明且有缺陷，導致澳洲政府陷自身必須在澳國高等法院以及國際投資仲裁機構上面對菸商的挑戰，以及多個 WTO 成員國分別提出的國際貿易挑戰。其結果可能在政治上和財政上都蒙受損害。

為達到公共健康的目標又不致引起意想不到的不良後果，政府應：

1. 確保現行法規的解釋和執行能夠一致。
2. 在推出任何新的管制措施前，應與所有利害關係人進行全面對話，並考慮合理的替代方案（例如永續的教育宣導活動），這些方案已在其他市場經證明是有效的。
3. 確保任何新的立法措施都是以實證為基礎。



## 高雄

高雄經歷了這麼多的變化。過去曾是推動台灣經濟的引擎，寶島大部分的成功在很大程度上要歸功於高雄這裡大規模的製造業。但時代改變了，因為時代不會總一成不變。外商、台商紛紛出走台灣，因為其他地方有廉價勞工等著他們。對許多人來說，這意味著遷往中國大陸。在中國大陸經營多年後，有 40% 的美國企業準備退出，許多台商也希望鮭魚返鄉。廉價勞工的指望已經消失，大陸成本節節上升。中國大陸法規朝令夕改、不夠明確的問題讓人倍感沮喪，整體上缺乏對智慧財產權的尊重也造成營收和利潤數十億美元的損失。現在，許多企業轉向泰國、越南、印尼和亞洲其他開發中國家，視其為下一個廉價勞動製造成本的聖地。或許這些國家會是如此；然而，我們已經吸取了一些非常重要的經驗教訓。只注重勞動力成本是相當具誤導性的，還須認真考慮其他因素。Rhythm & Hues 視覺特效公司決定擴大營運在高雄設立新辦公室時，本地人才是他們做出決定的關鍵所在。

高雄一直堅持將重工業製造轉型為高科技、高附加值、對環境友善的製造業，以及相對較新興的旅遊觀光、服務產業，轉型過程艱難，但現在的高雄常見到更蔚藍的天空，有大量自行車道，生活品質良好且生活成本負擔仍然很合理。高雄正成為一個真正的大都會，更國際化、更有趣、更歡樂，且其各個行業更為穩健。所有這一切都確實發生了，儘管過程當中遭遇國內外的一些危機，無論是經濟危機或是大自然力量帶來的災害。仍然有許多努力要繼續，但基礎已經打下、開發案正逐步完工、計畫正逐步到位，這座城市不斷在演變。未來幾年在這裡發生的一切將會使台灣這個第二大城市發光發亮！高雄最好的時代，這可能才剛剛開始！

高雄重要數據：人口 277 萬；捷運系統全長 64.8 公里；164 條公車路線；捷運載運量：8,100 萬人次（2012 年 1-10 月）

### **高雄主辦 2013 亞太城市高峰會**

2013 年 9 月 9-11 日，高雄將主辦兩年一度的「亞太城市高峰會」（APCS）。APCS 是 1996 年由澳洲布里斯本市政府所發起，每屆會議均吸引超過 100 個城市的代表參加，美國西雅圖、中國重慶、韓國仁川以及亞太其他重要城市皆曾舉辦過。近年來，高雄積極參與主辦國際性會議，藉此打開國際知名度與提升城市形象。打敗其他爭取的強勁對手城市包括韓國大田和中國昆明，高雄市政府榮獲 2013 年高峰會的主辦

權。在宣佈主辦城市的會議上，布里斯本市長 Graham Quirk 提及布市和高雄市 15 年的緊密姐妹市關係，並表示有充分信心高雄市長陳菊及其團隊將成功舉辦 2013 年 APCS，以及能進一步強化兩市與全球其他城市的連結。市長陳菊也期盼藉由主辦像 APCS 這樣的國際盛會經驗可以為城市注入活力、開創城市新思維與知識管理，帶動更前瞻更多元的國際觀。

會議主題為「城市經濟新創能—城市挑戰，城市行動」，高雄市已邀請 2012 倫敦奧運幕後重要推手，倫奧籌委會主席柯歐爵士 ( Lord Sebastian Coe ) 擔任大會專題講者之一，分享透過奧運建設振興倫敦城市地區發展與經濟的成功經驗。

陳菊市長也承諾 2013 APCS 將延續 2009 年世運會的精神，力行環保節能，除了朝向綠色、無紙張會議的目標努力之外，市府也將透過其他大規模的計畫折減舉辦會議所產生的碳足跡。

#### **ICLEI**

高雄是「地方政府環境行動理事會」( ICLEI ) 的會員城市之一，ICLEI 東亞地區高雄環境永續發展能力訓練中心在 2012 年 9 月正式啟用。2012 年 12 月一位市府官員表示，台灣南部的高雄市政府近期在一個國際性會議上提出城市氣候變遷保護行動計畫後獲得廣泛肯定。高雄市環保局長蕭裕正表示，這是首次台灣地方政府提出對抗全球氣候暖化的計畫獲得國際社會的認同。蕭局長率領代表團參加 2012 年 12 月 8-11 日在印尼峇里島舉辦的「聯合國氣候變化綱要公約」( UNFCCC ) COP13 會議。台灣並非 UNFCCC 會員國，該代表團官員是以 ICLEI 會員城市的身分參加。

高雄市在 2006 年加入 ICLEI，是台灣第一個成為 ICLEI 會員的城市。ICLEI 成立於 1990 年，目前在全世界已經有 67 個國家中 715 個地方政府加入，其創立宗旨是促進地方政府加入溫室氣體減量的行動。多年來，ICLEI 推出各種宣導活動和方案，協助地方政府追求永續發展，為該組織贏得廣泛讚譽。該會議將高雄港都執行 ICLEI 城市氣候變遷保護方案的行動計畫納入 ICLEI 秘書處。

#### **Rhythm & Hues Studios 新家落腳高雄**

多次贏得奧斯卡金像獎的美國 Rhythm & Hues 公司主要提供好萊塢電影製片廠及廣告商視覺特效與電腦動畫服務。成立於 1987 年，Rhythm & Hues 在幾乎所有大型的電腦動畫競賽獎項中位居龍頭地位。持續致力於擴展數位內容科技的新

領域，Rhythm & Hues 總部設於加州，製作基地則佈局全球，在印度、馬來西亞、加拿大溫哥華設有據點。Rhythm & Hues 位於高雄的新據點在 2012 年底開始營運。高雄辦公室是該公司全球製作基地的延伸，將共同製作公司承接的所有案子，製作水準也須符合同樣的高標準。台灣的高品質勞動力、現代化基礎設施和生活水準是 Rhythm & Hues 決定落腳南台灣設立特效製作中心的三個主要原因。R&H 創辦人 John Hughes 說：「從我們的角度來看，台灣具備我們設立新據點時必須有的數個不可或缺的要件。」這家全球前五大視覺特效公司的在台投資案包括台灣政府相關獎勵措施在內總計投資金額達 4,200 萬美元，將自海外引進 50 名特效專家，並在三年內訓練約 600 名本地人員，其中 200 名將聘雇為公司員工參與好萊塢電影的製作。

### **打球吧！**

義聯集團董事長林義守最近買下職棒球隊前興農牛隊，現已改名為義大犀牛隊。此舉為南台灣和中華職棒聯盟幫了一個大忙。前興農牛隊如果解散，台灣的職棒可能也隨之早已覆滅。所幸這並沒有成真。事實上，林董事長已表示願意注資扶植新球隊、延攬知名球員，為提高台灣棒球的運動水平盡力。義大犀牛隊落腳的主球場，最近才剛舉辦過美國職棒大聯盟全明星賽，先前也接待過洛杉磯道奇隊。

義大犀牛隊已展現企圖爭取本季球賽最高榮譽的雄心，球隊以兩年新台幣 1,470 萬元的合約簽下中華職棒新科選秀狀元胡金龍。大聯盟內野手胡金龍曾效力於洛杉磯道奇隊和紐約大都會隊。球迷和中華職棒人員對這項加盟合約都齊聲叫好，認為義聯集團和其全新改造的義大犀牛隊將重燃地方對職棒在南部的支持與熱情。林董事長希望善用兩座球場，澄清湖棒球場已接待過美國職棒大聯盟球員，另一座立德棒球場鄰近愛河位於市中路上可做為球員訓練中心。為林董事長歡呼三聲吧！他真的是揮出一記漂亮的全壘打！我們一定要再次邀請美國職棒大聯盟經常到台灣來，包括 2014 年開幕戰就從這裡開打吧。

### **高雄港新旅運中心**

高雄港埠旅運中心國際競圖第一名由紐約 Reiser + Umemoto 建築事務所贏得，設計特色包括一座高架開放式平台將既有徒步人潮延續至水岸空間，並且善用該據點的優勢以確保水面與陸地兩者之間最大的接觸介面。木板路沿著三個不同的點進到旅運中心大廳，並連接新設立的流行音樂中心、藝術區和購物中心，似圍繞在海濱的綠色項鍊。這項開發案預定在 2014 年完工啟用，屆時這棟有機、亮眼的建物將會吸引各地遊客和觀光人潮，並有助於提供許多工作機會。

## 高雄商務新時代！

2014 年 5 月將發生高雄近代史上可說是最重要的大事：2014 年台灣國際遊艇展。這個活動相當特殊是有其原因所在，它預告了兩項大型開發案的完工：遊艇製造中心和高雄世貿會展中心（皆預定在 2013 年底完工）。主辦 2009 年世運會對高雄而言是具有里程碑意義的事件，但那是個體育賽事，重心在於友好的體育比賽和文化交流。2014 年遊艇展重心是商務！這將是世界級的會展活動，有高達 1,500 個廠商齊聚座落於高雄港邊的世貿會展中心。當然，這絕對是個驚人的機會；毫無疑問，也是極度挑戰。這場盛會肯定會為高雄努力邁向國際工商大都會之林寫下新的一頁。有了邁阿密（高雄姐妹市之一）的幫助，市府正全力以赴確保這個活動的圓滿成功。國際遊艇展不僅將可推升台灣傑出遊艇製造商的知名度和銷售量，並協助推動本地的客用遊艇購買和包船產業，同時也能為世貿會展中心未來舉辦世界級會展活動奠定良好的基礎。

現在該是進行協調、統籌的時候了，要讓這座城市和遊艇產業做好準備。交通、飯店、航班、餐廳、活動等都需要進行評估、改進，並精簡流程以提高效率。需要確認參展廠商、潤飾簡報展示、訓練英語導覽人員和完成主辦接待人員安排。城市各個重要地點需要設置明確、有多種語言的招牌標誌。接駁巴士、捷運交通須完善規劃和做好準備，以應付屆時湧入的大量參觀人員、商務人士、展覽的買家和賣家等。新的旅遊資訊手冊和資訊亭需要定稿完成，分發至全市各個地方；包括機場、港口、捷運站、高鐵站、飯店、購物中心等等。全面更新餐廳、夜店、文化景點和活動等簡介手冊，將其改版為容易閱讀、輕鬆瀏覽且隨手可得的格式。活動主辦單位應建立一個 app，可以在 Android、iOS、Windows 平台上使用，並且提供中、英、日等語言選項，讓參展人員及遊客只要輕鬆滑動手指就可取得需要的所有資訊，包括參展廠商平面圖及相關訊息等，確保遊客可以輕鬆、快速找到一切。這種方式可減少三語導覽人員的需求。

此外，高雄市也應開發一個 app，提供 Android、iOS、Windows 系統行動裝置的格式，使用者可透過智慧型手機、平板電腦、筆記本電腦等在線上下載或存取。開發 app 需要時間，但潛在效益龐大值得這麼花時間。一旦 app 建置完成，這裡的觀光旅遊業未來將得到更好的服務。這些 app 應提供繁體和簡體中文、英文、日文等語言選項。將購物、餐飲、休閒、探險以及住宿旅館等資訊結合 Google 地圖來標示，使用者只要輕鬆點選就可取得所有訊息。此外，也應提供網上預訂和購票選擇。高雄，這將是你

發光發亮的時刻，所以做好準備。潛在的新合作夥伴和投資者、國際商界領袖以及重量級奢華品的大買家將為此次會展活動蒞臨本市，不要讓他們失望！給他們最棒的體驗，讓他們迫不及待將這個體驗告訴別人。此外，不要低估了這個展覽的觀光旅遊效應，這次活動的參展人士都可能是未來攜家帶眷來這裡度假的潛在遊客。既然提到了建置 app 的主題，也在此建議鄰近的台南、屏東開發自己城市的 app，若能共同協調建置 app，便可將南台灣的豐富面貌呈現給遊客、外籍人士和本國居民等。

## **亞洲新灣區**

高雄港舊港區的改建再造將形塑成為「亞洲新灣區」。這個開發計畫的主要目標是活化舊港口內未利用的或使用密集度不高的區域。在這個區域內的幾項大型都市開發案包括興建主要大眾運輸系統和基礎設施，例如高雄港埠旅運中心、海洋文化與流行音樂中心、高雄世貿會展中心、高雄市立圖書館總館、高雄環狀輕軌系統等。沿海地區將改造為令人耳目一新的外觀，符合城市的綠色戶外形象，並且加快開發鄰近的多功能經貿園區。高雄將蛻變為亞洲最新的灣區具有綜合觀光、商務、文化等功能的國際大都會。

高雄市政府已將港灣一帶劃定為城市的多功能經貿區，針對不適合作為工業用途的區域將改善其土地利用，並且重建和改造高雄港傳統的加工出口模式。預定的新建功能將滿足港口擔負起亞太製造中心、海運物流服務樞紐的要角。

### **高雄世貿會議展覽中心**

這個會展中心內部規劃有 1,500 個展示攤位、一間可容納 2,000 人的大型會議廳、兩間 800 人中型會議廳、四間 40 人小型會議廳、六間 20 人迷你會議廳等，並有各式配套設施以及戶外展覽空間。預定在 2013 年 12 月完工，會展中心將促進高雄成為國際物流中心，提升城市形象為具競爭力的國際海運和空運大都會，並可拓展地方產業的國內外市場、創造經貿機會、促進區域經濟轉型等。這項開發計畫將加速推動會展、觀光旅遊、商務服務等產業發展，共創繁榮。除了國際遊艇展外，還有 12 個可能在此舉辦的年度會展活動，包括國際汽車展、國際電腦展、行動技術展、電腦遊戲、汽車零配件（類似於每年在拉斯維加斯舉行的 SEMA 改裝車零配件展）、戶外活動、水上運動、觀光旅遊展、乾淨能源、國際美食烹飪設備（類似於新加坡 FHA 食品展與國際廚藝競賽）等，以及通往亞洲商務門戶年度大會等。

### **海洋文化及流行音樂中心**

海洋文化及流行音樂中心基地位於高雄港 11-15 號碼頭，占地面積約 11.49 公頃，規劃大型戶外表演廣場、室內展演廳、小型流行音樂現場展演空間、海洋廣場、海洋文化展示廳、音樂主餐廳、流行音樂產業發展育成中心，以及相關支援性商務設施等。這項開發計畫在 2009 年 10 月 1 日獲得行政院核准通過，總經費約新台幣 50 億元，預計於 2015 年底完工。

2011 年 1 月 18 日舉辦國際競圖評選最佳設計與建築顧問。由西班牙廠商 Manuel Alvarez-Monteserin Lohaz 與國內翁祖模建築師事務所合作的團隊得標。設計暨監造合約於 2011 年 4 月 22 日簽訂，初步設計圖說在同年 9 月 6 日通過。2012 年 5 月 23 日，行政院公共建設委員會已經核准 30% 的基本設計藍圖，文化部已將相關成果文件轉交高雄市府辦理後續作業。行政院也已核定流行音樂中心的土地使用計畫書，將會與相關管理單位執行土地使用移轉。環評報告以及都市設計委員會的評估都已完成。工程合約預定將在今年 7 月到 9 月之間開始施工，預計 2015 年底完工。基本設計和細部設計將會繼續辦理配合活動時程與執行，以協助訓練專業人士並支持流行音樂產業。

**設施簡介：**規劃在 13-14 號碼頭興建六個 Live House，將可作為室內現場表演的場域。面海區可另作為戶外展演空間、面陸區則為街頭藝術家廣場。

文創專區的設計靈感來自於海豚，共有五座建築體成環狀圍繞中心，兩個最西邊的區塊將作為橋樑橫跨愛河。這個新建案完工後將成為大型國際級特色的高雄地標和重要觀光景點。文創園區招標對象將選擇具有管理潛力的產業，以強化城市文化特徵，即使沒有排定演出時也能吸引固定的人群。

海洋廣場包括各種展示與攤位空間，具有方便運輸的功能，整體環境通風良好、舒適宜人且具現代化的設計。廣場將設在整個場域的中心樞紐，作為流行音樂中心的門戶。海洋文化展示廳將設在海洋廣場內。遊客可以欣賞船隻入港、飽覽廣場景色。二、三樓的懸掛式走廊可以讓遊客直接登上靠港的船隻。展示廳的主要目的是提供展示海洋文化、歷史、產業、與社會生活的空間。旅運大廳的主要目的是提供河港航運及旅運服務，是遊客可以購買船票、等候上船的地方。

大型室內表演廳將位於 12 號碼頭，舞台設計可以靈活提供多種，滿足每一類型的表演需要。座椅加上站立空間最多可容納 5,533 人，成為台灣南部第一座展演大廳能

夠容納 3,500-6,000 席的場域。展演廳後方及周邊區域也規劃了排練空間、工作坊和培訓中心等。大型戶外表演廣場將設在 11 號碼頭，包括一個大型篷頂、戶外舞台加上戶外觀景平台。廣場將能容納 12,000 名觀眾，周邊站立區還可容納更多人。這個戶外廣場將包括兩座地標塔。位於北側的地標塔 1 約 85 公尺高，目前規劃有流行音樂展示館、營運中心、live house、音樂培訓中心、後台區、輔助空間以及頂層景觀餐廳等。地標塔 2 位於南側（舞臺後方）高約 55 公尺，將支援戶外演出提供更多的聲光效果，並包括一個排練空間、後台區和輔助空間等。兩座地標塔將可提供大型篷頂、表演舞台、後方面板所需的設施以及聲光控制等。大尺寸 LED 面板也可以安裝地標塔 1 和塔 2 的外表（類似台北小巨蛋）。演出過程中，LED 面板有助於提升視覺效果。外部空間也可供出租廣告使用。

### **港口發展**

高雄港由台灣港務公司經營，而非市政府。

### **南星計畫**

南星計畫預期能創造就業機會（包括施工階段的短期工作和長期永久工作機會）。透過簡化物流將有利於本地遊艇製造業，透過更有效率的貨物轉運將推升港口業務，此外南星計畫也可帶動和遊艇相關的觀光旅遊產業，並有助於鞏固和擴大港口金融支援機會。高雄港主要競爭對手是新加坡或香港。不過，香港近年來因船運和郵輪產業污染的壓力大增使處於不利的地位；而新加坡港口相關業務的成本較高，且當地幾乎沒有任何製造業。南星計畫遊艇製造專區（占地約 46.64 公頃）預計於 2013 年 12 月完工，第二期工程包括工程經費達新台幣 40 億元的貨櫃服務中心，占地約 66.46 公頃。整個南星開發案預計在 2016 年 8 月完工。屆時，將包括 28 個遊艇製造廠房（單一廠房面積約 2 公頃）、14 個關聯產業製造區（單一廠房面積約 0.5 公頃）。預計遊艇製造及關聯產業製造將可引入新台幣約 500 億元投資金額，年產值達 1,000 億元，創造 4,000 個以上工作機會。

### **郵輪母港發展事紀**

- 2010 年 6 月 22-27 日，高雄市經發局和交通局共同率團到上海與蘇州參加「2010 亞洲郵輪大會」。這兩個部門不僅強調高雄發展郵輪產業的決心，也表示希望和相關港口合作建立彼此停靠的郵輪母港並推動郵輪業的經濟發展。

- 2011 年 9 月 30 日，高雄市政府舉辦「2011 高雄郵輪及客輪產業國際論壇」，邀請國內外航運產業代表參加，討論發展郵輪產業以及推動高雄成為台灣國際郵輪母港所需的基礎建設。
- 2011 年 10 月，經發局和高雄市郵輪及客輪產業發展協會共同率團到天津參加「2011 第六屆中國郵輪產業大會」，希望藉此開發「環島郵輪航線」以及兩岸郵輪式渡輪的港口合作，以推動國際與兩岸郵輪產業的發展。
- 2012 年 2 月，陳菊市長率團參訪美國邁阿密姊妹市，訪問團成員包括高雄港務局（現已改組為台灣港務公司高雄分公司）的代表，高雄港和邁阿密港締結姊妹港，市長和訪問團人士也在場見證。
- 2012 年 8 月 20 日，高雄市除了先前推動「高雄市郵輪及客輪產業發展協會」的成立之外，也辦理郵輪產業論壇並積極參與國際性郵輪會議。為擴大行銷高雄郵輪產業，高雄市會強化與世界主要航商的溝通聯繫，並積極爭取各大郵輪航商到高雄，希望將高雄打造為國際郵輪母港。
- 2012 年 8 月 31 日，經發局和高雄市郵輪及客輪產業發展協會在高雄京典酒店舉辦「2012 郵輪產業發展論壇」。台灣港務公司高雄分公司希望提升港口旅客服務水準、建立海洋門戶新形象以及推動郵輪產業的發展。行政院已通過高雄港旅運開區發案，預定在 19-20 號碼頭興建旅運大樓。此開發計畫主要目的是將高雄港口設施結合現代化國際旅運服務大樓。工程已在今年 2 月動工，預計 2014 年底完工。

### **南星自由貿易港區計畫**

南星自由貿易港區計畫的目標是整合港邊產業，預期將可吸引超過新台幣 100 億元投資，帶動南高雄的工商發展與就業機會。未來將由台灣國際港務公司高雄分公司和交通部開發物流、倉儲、綠能、下游組裝等臨港型產業，同時兼顧生態保護及居民親海休憩權益，保留鳥類棲地並留設 10 公頃臨海公園。自由港區內進駐的廠商必須為非污染性產業。南星計畫區中林路以北開發為「自由貿易港區」，中林路以南則由高雄市海洋局劃設為「遊艇專區」。為擴大自由貿易港區腹地，市府於 2010 年 3 月同意撥付南星近程計畫區 48.32 公頃的土地。2011 年 3 月，再同意撥用 50 公頃交予交通部高雄港務局開發臨港自由貿易區。2012 年 9 月 20 日，高雄市審議通過南星自由貿易港區計畫。



興達港於 2012 年 11 月 14 日啟用。市府對興達港的開發已進行全面性的評估分析，包括濱海遊憩碼頭評估、茄苳濕地開發以及對當地居民的影響等。擴大商業區的同時也要維護生態濕地環境，以兼顧地方經濟發展和生態保育的需求。為創造茄苳地區就業機會與開發生態旅遊潛能，24 公頃土地應劃設為特殊性工業區、13.6 公頃作為觀光休憩用途，10.9 公頃作為商業用途、27.7 公頃作為二級產業、148 公頃作為濕地公園。興達港開發案及南星計畫的基礎建設和招商預計在 2014 年底完成，將為高雄提供 6,000 個以上就業機會。

## 機場

夏威夷當地航空公司目前正和高雄洽談評估開闢高雄直航檀香山的可能。這是今年白皮書最重要的議題之一，因為大部份我們所提出的見解、建議追根究柢就是高雄國際機場航線進出的問題。夏威夷航空公司一直是列為世界上最好的航空公司之一，他們目前積極擴展亞洲市場版圖，所以**高雄必須抓緊時機**。吸引到高雄直飛美國的航線，其他一切就有機會。在這裡有個可悲的事實：只要必須透過台北 / 東京 / 首爾 / 香港轉機到美國的事實沒有改變，高雄就仍然是二級國際城市。在美國的台灣人大多集中在洛杉磯、舊金山、休士頓和紐約，因此高雄應積極拉攏和這些美國城市的直航航線。此外，高雄國際機場在本地也稱為小港機場，這容易令人混淆誤以為高雄有兩座不同的機場。高雄國際機場因附近住宅區噪音限制和短跑道的因素僅有 60% 的利用率。中國飛來台灣每周 554 個航班中只有 52 個是到高雄。機場發展包括尋求外商作為 BOT 合作夥伴，或是投資興建一座全新機場或大幅改善現有機場。高雄國際航空站朱主任正尋求 2,000 萬美元投資案來達成上述目標。現今國際機場的設計規劃要做到讓旅客在航班出發前至少 2 小時在機場可以很輕鬆舒適，因此機場整建應著重於航廈室內裝潢、設計、購物、餐飲、旅客服務、休息場所等。

高雄國際機場希望未來能發展為航空城。民航局針對台灣民航站的整體規劃進行研究，提出未來五年的發展計畫（包括檢視南台灣國際機場的功能與定位）。相關航空城的規劃可參考其他國家的經驗，特別是那些有足夠旅客和貨物運量的機場。香港、仁川、阿姆斯特丹史基浦、杜拜機場等每年旅客運量超過兩千萬人次、貨物運量超過一百萬公噸。此外，要成功打造航空城必須包括足夠的航線、便利的空中運輸分布以及具有產業優勢的物流服務。高雄國際機場就位於市中心，一直以來享有成熟商港和密集工業區的優勢。經過多年市政建設發展後，其空港、海港和周邊區域逐漸形成現代化貿易大城的原型。這個城市原型的發展將可帶動海空運輸的成長。目前機場設施容量仍可滿足到 2035 年的需求，有預定計畫改善整建機場以維持必要的營運條件。改

善工程包括航廈大廳整修與防水工程、航站大廳空調系統升級、國際線出境大廳報到櫃檯的汰舊換新等。

這裡有一個不容忽視的關鍵特色在於確保機場未來的開發整建必須納入世界級的購物、餐飲場所。隨著機場安檢要求的提高，旅客在航廈等候的時間越來越長，他們需要餐飲、購物來打發時間，還需要最有效率的報到櫃檯服務。他們需要而且喜愛適度的南台灣熱情好客！現在是時候招募觀光旅遊科系的學生到機場航廈，在旅客候機時進行旅客問卷調查，調查他們對南台灣旅遊經歷的意見看法。可提供小禮物鼓勵旅客參加問卷調查，可能的話，邀請航空公司贊助機票每月提供抽獎，讓一兩個幸運的旅客可獲得機票。全球幾乎所有在積極擴展旅遊業的國家都採納這種市調方法。為了取得最佳競爭優勢，我們需要明確了解顧客需求、欲望與期待。

高雄機場改善升級計畫進度報告：這是根據 ICAO ( 國際民航公約第 14 條規定跑道中線往外兩側各 150 公尺必須淨空 ) 規定在交通部民航局主導下由高雄國際航空站所提出的飛安改善計畫。計畫在 2012 年 11 月 13 日審議核定，就待內政部通過後即可實施。計畫也考慮機場圍牆和機場設施限高的問題，都市計畫法規的修訂有助於後續資金的到位。這項改善升級計畫涵蓋面積達 24.63 公頃。

### **建台水泥廠區計畫**

左營站是三個交通運輸系統匯集之處，建台水泥計畫開發周邊區域，將引進住宅、商業、服務等複合式功能，進一步帶動該區域成長中的商業活動。計畫包含 3.79 公頃土地作為住宅用途、2.32 公頃作為商業區。主要計畫的評估審議已在 2011 年 7 月完成，細部計畫在 2012 年 3 月 19 日已獲得高雄市都市計畫委員會審議通過。

### **高雄市立圖書館總館新建工程案**

令人驚嘆的高雄市立圖書館總館計畫經費達新台幣 15 億元，將為高雄居民打造一座世界級的圖書館。基地面積有 2 公頃，計畫興建八個樓層，總樓層面積達 37,119 平方公尺。工程專案管理技術服務的採購在 2010 年 2 月展開，由張瑪龍建築師得標。國際競圖評選過程分為兩階段，最後在 2011 年 2 月選出第一名作品：森林中的圖書館、圖書館中的綠樹 ( *Library in the Forest and the Tree in the*

Library)。施工已於 2012 年 10 月 15 日正式展開，預計在 2014 年底完工營運。預計總館藏書達 50 萬冊，最近「百萬藏書計畫」已經開跑，目標是透過各界捐贈充實館藏。

### **設計理念**

和伊東豐雄合作完成高雄國家體育館的設計建築後，劉培森建築師繼續為高雄市圖總館實現其綠色建築的理念，採用簡單、穿透性的設計並整合懸吊樓板式的結構設計。在建築物六樓的中央藉巨型天井的設計，將大片自然光及綠意有效引入各樓層，提供綠色、寧靜的環境並可達到節能。戶外花園可改善通風，促進室內空氣流動並達到自然循環。室外氣溫在攝氏 26 度以下時，中央空調將自動關閉以節省電源並提供舒適的閱讀環境。分別在西側和南側設計面對大片森林五米寬的陽台空間，在日正當中和下午太陽照射時，這片樹林可以提供遮蔭並且自然隔絕噪音，創造非常棒的自然閱讀環境。至於館內的閱讀空間，採極簡空間設計。

圖書館的室內空間分隔極具機能彈性，於大型樓板（67.2mx67.2m）四個的端角設立結構服務核。以懸吊樓板的方法將傳統結構柱轉換成鋼索，這可大幅改善內部空間與使用區域的穿透性和機能彈性。設計團隊同時也考量將圖書館設計為可以舉辦容納眾多人潮的活動場域，因此設計一個兩層樓高（挑高約 8.4m）的大型半戶外廣場，提供毫無阻礙的視覺與動線，觀眾在廣場參與活動時下雨艷陽都不怕。

### **建議**

圖書館總館也應考慮增加大量的英日文藏書，以吸引更多外商投資與人才進入勞動市場。中英日語等外語書籍的藏書選擇可依據國際暢銷書名單和本地讀者需求來提供。此外，應設立電子書方案，允許有識別證或居留證的民眾暫時「借閱」書籍。電子書方案的註冊方式應設計為首次親自到圖書館辦理，日後便可選擇在線上或親自辦理。電子書不會因為時間久遠而受到損壞，也不會受限於不良借閱使用習慣、氣候、溫度、濕度等影響，因此一旦圖書館系統建置電子書方案後，便可永久有效。電子書方案也可配合本地學校一致辦理，以提供更廣泛的材料基礎供研究、學術計畫使用。電子書也應提供英日文語言選擇。

### **教育**

高雄美國商會要藉此機會向提供非常高品質教育的高雄美國學校（KAS）與高雄馬禮遜學校（Morrison Academy Kaohsiung）表示讚賞，同時也要讚揚陳菊市長支持這

些國際學校。在校長 Tom Farrell 博士的監督下，KAS 每年有越來越多的畢業生進入長春藤學院就讀，有些學生則進入加州大學（UC）體系就讀。

高雄市正在實施各種教育措施，包括確保適性學習的公平資源分配、為高職提供社區教育資源、舉辦線上徵才、擴大高職免試入學方案、改善技職教育，以及建立產學合作方案等。

「受教權益網絡」的執行是要確保弱勢族群接受教育的權益。教育部 12 年國教政策的執行，包括公私立機構學費標準化、高職免學費方案、產學合作彈性學制與課程、免費技職教育課程等。

### **高雄欲發展金融產業**

在最近一個金融產業發展座談會上，陳菊市長呼籲中央政府解除對金融產業的限制、在高雄自由經濟示範區內設立一個金融中心，以協助城市改造。本地學者專家也提及建立離岸金融中心不僅將可吸引海外台資回流，並可引進陸資來台。台灣金融研訓院已受委託進行可行性研究。藉由設立世界級金融中心導入國際金融實務作法，投資、銀行業務、跨國企業發展等都將大幅提升，也可促進國際 B2B 交易。

### **引入更多外資進駐高雄**

為因應高雄縣市合併，市府地政局將開發區業務作為優先考量，以提高土地利用成效。人口集聚、市縣交界、重大建設、鄰近交通節點地區，將優先辦理市地重劃。可能會有外資參與的新市鎮投資興建案已經啟動土地利用方案。藉由舉辦「高雄海洋展」與「2014 台灣國際遊艇展」以及針對這些活動舉辦各種強力行銷宣導，高雄市將積極強化高雄遊艇海洋產業的優勢。為進一步善用媒體曝光宣傳的機會，「2014 台灣國際遊艇展」應廣邀貴賓及國際媒體到高雄參訪。

高雄市應積極參加區域性和國際性的郵輪聯盟、組織、協會等，形成組織的結盟以提升在國際上的能見度。這將可促進國際間對高雄的認識並提高外商投資的信心。高雄市也應增加和台灣港務公司高雄分公司的合作，主要目標包括簡化、提升 CIQS（海關、移民、檢疫、安全）。相關手續方便快捷，並且將有獎勵辦法吸引郵輪和外籍旅客到台灣旅遊。有一個宣傳方案「高雄 - 亞洲新灣區」介紹本市三個新地標的興建計畫：高雄世貿會展中心、海洋文化及流行音樂中心、高雄市立圖書館總館。還有節

能減碳計畫推動高雄的太陽能與綠能產業。總體興建計畫再加上水岸輕軌捷運系統總經費超過新台幣 150 億元。這將進一步吸引外商和商務移民到高雄。

### **經濟發展局招商處**

經發局應致力於改善投資獎勵辦法。中央政府通過的新法應確實執行，包括對產業創新研發計畫的獎勵及補助對象。此補助方案總經費超過新台幣 30 億元，允許個案補助最高新台幣 1,000 萬元。這個獎勵辦法將有助於強化研發能力對本市企業提供實質協助，並且推動產業升級。為實質改善失業情況，市府持續實施「小蝦米商業貸款」方案，這屬於地方型產業創新研發推動計畫 ( SBIR )。此外，經發局也持續辦理產業輔導計畫。為推動產業發展而新修訂辦法包括融資利息補助、房地租金補助、房屋稅補助、勞工薪資補貼、勞工職業訓練費用補助等。

將會建置並維護招商資訊資料庫，以有效掌控本市可投資土地的相關訊息，並協助潛在製造業投資者尋找合適的土地。該資料庫將在 2013 年 3 月建置完成。這個資料庫主要是供潛在製造業者查詢本市土地供需資料，包括尚未投資或低利用程度的工業用地等。這些土地位於本市的工業開發區和重要工業園區內 ( 例如加工出口區等 )。未來業務包括設置資料庫篩選功能、標示土地價格、土地情況等資訊，並且定期進行更新。預計這將提升辦理閒置工業用地供需的效率，進而促進潛在投資的可能。有效協助製造業者將可減少搜尋土地所花費的成本，並加快投資的可行性，對所有人都有利。

### **建議**

設置單一服務窗口並指派一名專責人員負責單一個案計畫，這種方式將有助於釐清投資計畫內容，並在整個行政流程中有效追蹤個案情況。定期舉辦跨部會議以整合市府資源、消除投資障礙將可提升整體效率。為解決楠梓加工出口區第二園區東側日益嚴重的交通壅塞問題，市府新闢一條道路在 2012 年 1 月完工通車。這項工程展現了高雄市政府願意積極協助廠商的需求。楠梓加工出口區第二園區污水下水道工程、中央分隔島遷移以及交通量提升等問題都在市府協助下完成。楠梓加工出口區第二園區目前進駐廠商包括穎崴科技、日月光集團、李長榮集團等。

為協助企業取得銀行貸款，市府已採取各種作法了解廠商融資需求、協助製造業者尋求融資管道，並依個案情況主動和銀行進行協商。這將有助於業者申請相關貸款與政府補助，並積極為銀行與投資者之間建立溝通管道。協助招募人才：免將創意影業最近招募更多員工。2012 年 7 月 23 日在報紙刊登徵人廣告，為此從 7 月 24-29 日勞

工局和經發局共同舉辦四場徵才活動，有 400 多個求職者參加，其中 150 人獲得訓練機會，之後 115 人進入免將影業，其中 74 位年輕新進人員是高雄本地人。

高雄即將成為台灣第一個自由經濟示範區。這個示範區須享有免稅優惠，相關港區開發需要進行以吸引更多外資投入，並且也應包括一個加工區。應考慮將此經濟示範區擴大至全市，這將可為地方經濟創造更多機會，因為如此以來地方業者才不會被排除在外。

## **姊妹市**

### **高雄市政府**

市政府期望促進高雄市與其姊妹市更快速、更頻繁的對話交流與意見分享。(目前高雄的美國姊妹市包括：夏威夷檀香山、田納西州諾克斯維爾市、佛羅里達州潘沙克拉市、喬治亞州梅岡市與平原鎮市、阿拉巴馬州莫比爾市、奧克拉荷馬州陶沙市、德州聖安東尼市、阿肯色州小岩城市、科羅拉多州科羅拉多泉市、佛羅里達州邁阿密市、奧瑞岡州波特蘭市、華盛頓州西雅圖市、佛羅里達州羅德岱堡市)。高雄和姊妹市學校的學術交流包括透過視訊技術促進雙方溝通，並透過互訪促進文化交流。這方面已有很棒的例子：奧克拉荷馬州的 Jenks East Intermediate School 與博愛小學、澳洲布里斯本市的 Indooroopilly State School 與福東小學、南韓釜山市的 Young-yun High School 與正興國中等。

為加強高雄姊妹市關係、推動建立姊妹市活動，市府秘書處積極鼓勵高雄市進行訪問和商務考察。另外，市府各局處也有姊妹市認養計畫，可根據城市的特色專長事務和市府一個或多個部門配對交流。以美國姊妹市為例：德州聖安東尼市由財政局認養；奧瑞岡州波特蘭市由教育局、經發局和警察局認養；佛羅里達州邁阿密市由教育局和海洋局認養；奧克拉荷馬州陶沙市由教育局認養等。高雄市定期派代表團參與波特蘭玫瑰節，除官方代表團外，樹德家商也有學生表演團體參加遊行以提高城市能見度。此外，波特蘭和西雅圖代表團也常年派代表團參與高雄燈會與高雄國際龍舟賽等。2012 年是高雄和檀香山締結姊妹市關係 50 周年，檀香山特此舉辦免費 Aloha 音樂會慶祝活動。市府高層官員親自參與活動並且有高雄本地表演藝術家隨團演出。這場慶祝活動代表了檀香山和高雄友誼長存，是兩市關係發展重要的里程碑。

### **高雄市國際學生獎學金**

高雄市國際學生獎學金設立目的是要鼓勵優秀外籍交換學生。對熱心參與文化交流或社會服務活動的外籍高中學生都可提出申請。入學審查過程對來自於姐妹市或友好城市的學生給予提高權重加分。此計畫目標是尋求和具備相似潛力的姊妹市積極建立關係。在審查獎學金申請人資格時，將優先考慮那些具有對於能促進海洋產業雙邊交流與合作的相關產業背景的學生。這個方案的設立將有助於運用與發揮學術、研發、經貿夥伴關係交流的優勢。

## 觀光旅遊

2011 年，來台旅客 1,550 萬人中只有 144 萬人從高雄入境。2012 年本白皮書可取得的數據為 1 到 11 月，這段期間來台旅客 1,602 萬人中有 146 萬人從高雄入境。儘管觀光旅遊業有明顯的成長，佔 GDP 的 4.6%，但和全球平均 10% 相比仍有很大落差。美國免簽證計畫允許持有有效晶片護照的台灣公民上網輕鬆申請授權許可，且費用低廉。新規定允許兩年內可多次入境停留達 90 天。台灣預期免簽證計畫上路後每年將有約 60 萬台灣人赴美。夏威夷航空公司有可能開闢直飛高雄的航線，但目前正協商要求降低機場降落費。高雄則尋求推動高雄國際機場和洛杉磯國際機場直飛航班的可能。台灣人在美大多集中在洛杉磯、舊金山、休士頓、紐約等城市。去年來台的日本遊客和陸客人數上升。

高雄市正採取各種作法推動觀光旅遊產業。飯店須通過政府制定的標準取得星級，高雄有六家台灣評定為五星級的飯店，包括國賓、漢來、金典、福容、義大皇冠假日飯店、義大天悅飯店（不在市中心）。為增加本市高品質旅館住宿的選擇，將興建兩個全新的五星級飯店，一個將座落在夢時代區域，另一個位於往北約 15 分鐘緊鄰新的 Costco 賣場（目前正由義聯集團 / 義大興建中）。兩家飯店均預計在三年內完工營運。為打造一座更有趣的高雄市，目前正制定推動三個新計畫，包括橋頭糖廠台灣舞蹈秀、原住民舞蹈表演以及 34 間物產商家主題旅遊等。

觀光旅遊業主打的意象向來包括：城市、海洋、農場、廟宇、海鮮等。高雄規模最大的觀光景點包括佛光山佛陀紀念館，每年吸引約一千萬名遊客；其次為駁二特區，每年約兩百萬名遊客。目前正規劃更多的夜間活動和表演秀，以吸引更多觀光客並且提升居民夜生活選擇。此外目前也在策劃推銷「暖冬遊高雄」，吸引從較寒冷國家來的遊客到高雄享受艷陽高照的好天氣。高雄市也積極爭取各種運動球隊到這裡舉行冬季 / 春季訓練營，此外目前也正努力說服美國職棒大聯盟的 2014 年開幕戰可以移師高雄，如此一來也可完美搭配下個春季義大犀牛隊在澄清湖球場的初登場。

高雄港埠旅運中心、市立圖書館總館、世貿會展中心、流行音樂中心等新建工程陸續完工後，將可大幅提升港區的觀光休憩活動。屆時將規劃推出租船服務提供私人遊港，每兩小時的費用為新台幣一萬元；另外一旦政府許可核配後也將推出從高雄港出海的海上遊樂行程。愛河也將推出新的遊河服務，包括天鵝船、從威尼斯引進的貢多拉船和獨木舟等，使遊客可以更悠閒暢遊這條已有全新面貌的愛河。高雄希望將港口 / 愛河一帶打造為城市的藝術浪漫之心，形塑高雄為浪漫港都，吸引年輕情侶到遊甚至成為結婚蜜月的首選。其他旅遊行銷創意還包括蓮池潭滑水活動。

「高雄市旅館及民宿品質提升計畫」已邁入第三年，2010 年有 16 家旅館通過認證，2011 年有 14 家旅館，2012 年有 5 家民宿、20 家旅館通過認證。此外，為方便到高雄住宿的遊客選擇優質的住宿，由高雄應用科技大學觀光管理系及資管系合作開發建置跨平台的「高雄好住宿 app」，可以在 google play 找到該款應用軟體：

<https://play.google.com/store/apps/details?id=com.kh.khgoodstay>。不管是使用 iPad、iPhone 或 Android 手機，均可下載 app，搜尋 2010 年至 2012 年通過認證的高雄市優質住宿。值得注意的是這個 app 目前只提供中文版本，我們希望在很快的未來也可以看到英日文版本。

結合夜間觀光活動、旅遊景點、休閒與健康、美食和其他元素等將可強化高雄的豐富性。有另一個活動「高雄物產鹹酸甜遊學趣」，主打高雄市獨特的山海河城市兼具，多元環境孕育不同產業風貌，且地理位置適中、進出往來都非常便利。高雄也擁有獨特的農漁村景觀和豐富的物產，增添城市的魅力風情。為強調這些地方物產資源，2012 年夏天市府推出「高雄物產鹹酸甜遊學趣」的活動，串連高雄各物產與民宿、文創觀光工廠、農漁村等，以互動、遊學式的體驗帶領遊客旅遊觀光。「暖冬遊高雄 - 精彩五線好」的活動讓遊客可以感受高雄秋冬宜人氣候之美，到六龜泡溫泉以及到美濃賞蝶等。活動包括五條路線，分別為(1)《山城花語湯之旅》：行程路線經過六龜、美濃、與旗山；(2)《紫蝶生態部落行》經過茂林；(3)《濱海 17 鮮味行》經過彌陀、茄荳、梓官與鼓山；(4)《品味總舖內門行》經過內門、甲仙、美濃與旗山；(5)《鳳邑樂活古早味》經過鳳山、燕巢、大樹、岡山與橋頭。參加這些行程的遊客可獲得市府贈送旅遊手冊，內有地方物產簡介、折價券、促銷優惠使用等，將有助於帶動地方產業。



市府也計畫將旗津區公所改建為青年旅館，將旗津醫院改建為國際觀光旅館，以進一步帶動觀光旅遊產業、吸引外資到高雄。目前，這些計畫還在分區使用變更審查階段。

## 交通運輸

為打造「30 分鐘生活圈」的新運輸型態，市府規畫轉運樞紐方式將各個大眾運輸網絡連結起來。以高雄車站、左營高鐵站為兩大主轉運樞紐，鳳山、岡山、小港、旗山為四大次轉運樞紐。這些轉運樞紐將整合鐵路運輸（台鐵、高鐵）以及國道客運、公路客運及市區公車等各層級路線，建構完善大眾運輸路網。交通局也規劃一套公車捷運（BRT）系統，提升城市的公共運輸服務。此計畫已向中央交通部爭取補助辦理 BRT 系統設計與沿海幹線可行性研究。成本相對較低的 BRT 系統預計將有助於補足鐵路路網不夠綿密的缺失。

國道 10 號自由路下匝道交通壅塞問題：市府和交通部高公局合作在國 1 南向轉國 10 西向匝道設置紅綠燈，以避免車流匯入平面車道車流壅塞回堵。目前的車流動向配置無法在交通尖峰時段有效紓解車流量。想要下自由路或博愛路匝道的西向車輛被迫匯入從國 1 南向轉國 10 的車流。應考慮增建車道，這樣從國 1 進來的車流就不必匯入國 10 準備下自由路 / 博愛路出口匝道的車流。這裡是大量車流匯集之處，造成交通壅塞難解。

利用車輛偵側器測量改善工程前後的車流速度顯示，自由路出口匝道在下午尖峰時段的平均車速從時速 24 公里增加到 28 公里，國 10 鼎金系統西向道路車速從 30 公里增加到 35 公里。儘管有所改善，但時速 24 公里（15mph）、35 公里（21.75mph）仍是慢到令人倍感沮喪。國 10 和周邊道路壅塞情況仍有待大幅改善。再加上路竹、本州工業區的成長，進入國 1 車輛和南向進入市中心的車輛將使這些地區的交通壅塞更為嚴重。主要幹道擴建工程完成也不過是幾年前而已，現在因為通勤人口增加早已抵銷車流改善的情況。一般而言，博愛路和民族路路段接上國 10 的道路使用情況，以及國 1 各交流道系統（九如路、建國路、中正路、三多路、中山路以及 88 快速道路）等道路容量幾乎已達上限，尤其是尖峰時段更是不敷使用。用路人不耐塞車之苦可能會暴怒，更會遊走法規邊緣，事故發生率會增加，車流減速導致車輛排放廢氣增加只會帶來更多的污染。

迴轉車輛已成為十足令人討厭的問題，應制定新的道路規則並確實執行。有太多車輛在主要十字路口試圖迴轉，阻礙其他車輛通過路口往往使得交通打結。應在所有主要十字路口禁止迴轉，改由在車流量較少的鄰近路段拐角處允許迴轉或是使用迴轉

專用車道。此外，許多主要幹道有太多小的街道交叉，而且往往有紅綠燈控制，不僅對用路人容易造成混淆而且也破壞主要道路的車流移動。這些小街道應只允許併入主要道路外線車道且豎立停車再開標誌而非用紅綠燈控制。這樣可減少信號燈總數並消除交叉車流、改善交通安全。遠程目標應針對主要幹道設計左轉專用道（請確實執法取締那些違規利用左轉專用道搶道直行的用路人）。此外，左轉專用道的燈號時差改成綠燈早開允許左轉車輛先行，而非綠燈結束時再讓左轉車輛通行的作法已取得成效。行車安全與宣導方案應進一步擴大實施，包括道路交通安全與用路人安全，在廣播、電視、網路、平面等各個媒體強力宣導。最近由一位住在高雄的外籍人士進行非正式調查顯示，本市十字路口有 33% 的用路人發生違規，其中 1/3 闖紅燈、1/3 等紅燈時超出白色禁止越線、1/3 停在斑馬線上。

高雄智慧運輸中心已完成市中心交通號誌線上同步的功能，並預計在 2014 年完成全市的時相同步連鎖。輕軌系統將採適應性信號控制（紅綠燈在感測到有輕軌車接近時自動延長燈號時間）。

## 交通局

根據 2011 年人口普查結果，65% 的人口依賴機車作為移動載具。為建立更好的行人環境並降低路邊違規停車情形，交通局選定幾個重點區域，包括瑞豐夜市、新崛江商圈、高雄車站等針對機車族實施新規定。為促進大眾運輸系統的使用普及化，實施機車停車格收費規定並增設禁止機車停放人行道與騎樓。2012 年，機車使用率已降到 50%。市府將繼續提升大眾運輸網絡滿足民眾需求。

此外，為連結各個運輸系統並提升效率，交通局根據不同的需求和人口集聚將大眾運輸系統劃分為好幾類。2012 年 7 月，高雄市每個行政區「區區有公車」的目標已 100% 達成。其他目標還包括改善服務、更好的候車環境以及降低誤點等。主要行政區規劃設置六大轉運中心，以建構完善大眾運輸路網。同時為提供身心障礙居民更好的服務，市府將擴大無障礙公車與康復巴士的服務。其他計畫包括油電混合動力公車、電動車、10 條路線的公車捷運（BRT）系統等將在不久的未來實現。交通局的目標是提供更好的服務、達成無縫接軌的大眾運輸、增加大眾運輸的使用率，並致力於打造永續環保的綠色都市。

高雄市繼續實施各種政策措施以提高大眾運輸使用率，包括跨年晚會、演唱會與其他活動時間點的整合，提供優惠票價（捷運轉公車或公車轉捷運享半價轉

乘優惠、學生幸福月票新台幣 799 元、幸福月票 999 元、7 種優待票等 )，以及改善公車路網 ( 捷運站、接駁車轉乘資訊全面更新，繼續捷運站接駁公車之服務 )。

### **停車**

為提高民眾使用捷運，已減少中山路停車格。2013 年，違規停車拖吊業務將全面民營化 ( 目前公家及民營拖吊兩者都有 )。「高雄好停車 app」可提供查詢高雄市停車資訊，今年新增設 7,000 個停車位。號誌故障維修服務請打專線：07.229.9804。

### **公車**

高雄市正在興建六個公車站點，其中五個靠近捷運站，以完備運輸系統。公車捷運系統 ( BRT )：高鐵左營站->中華路->高雄車站。目前本市有 11 台純電動大巴士，造價比傳統公車高出三倍。

### **公共設施**

2000 年展開公共基礎設施分布調查研究，截至 2012 年已完成 12 個行政區的分布調查 ( 11 個在縣市合併前的高雄市加上鳳山區 )。仁武區、鳥松的公共基礎設施調查研究應可在 2013 年完成。已向中央申請補助完成其餘的 24 個行政區。計畫是每年完成兩個行政區的調查研究。初期經費將需要新台幣 1 億 5 千萬元，完成總面積達都市計畫分區共 14,874 公頃的調查。其中部分經費由工務局編列年度預算，其餘則由中央補助。

### **其他發展概念與活動**

- 統一集團打算在夢時代附近打造一座 3D 影城。
- 高雄世貿會展中心計畫獲得中央補助 31 億元。
- 高雄市區鐵路地下化計畫總經費達 99.8 億元，預計 2017 年完工。

這將串連三大區域：高雄市區、左營、鳳山，並且將新增 8 座通勤車站，班次間隔 10 分鐘。屏東潮州捷運化計畫將可串連潮州、左營與高雄市區。高雄捷運紅線將更向北延伸到達岡山站 ( 2013 年 4 月 )，最遠達路竹市中心；往南邊的延伸線目前正在討論規劃中；往西延伸可經由鐵路串連達成。

- 太陽能船計畫繼續進行，將再興建 10 艘預計 2012 年可完工啟用，打造高雄成為全台灣最大的太陽能船隊。

## 屏東

一般來說，屏東主要是農業社會，目前屏東希望能朝更有韌性、不易受風災影響的產業發展，並且希望產業發展能與在地自然資產更為一致，屏東就是擁有這些自然資源才成為如此美麗的地方。這裡全年天氣良好、陽光充沛，非常適合發展太陽能技術。由於其經濟基礎仍然是在農業，因此土地價格和土地利用都很適合發展。

2009 年太平洋颱風季造成的死傷令人驚訝，而其中最具破壞性的颱風就是莫拉克颱風。莫拉克也是台灣有歷史記錄中造成最多死傷人數的颱風。短短三天內降下的雨量超過 2.7 公尺 ( 106.3 英吋 )，是正常一年累積雨量的 1.7 倍。暴雨導致土石流淹沒村莊、公路橋樑柔腸寸斷。破記錄的大雨帶來廣泛的水災使數千人受困偏鄉多日，道路橋樑斷裂更使得救援工作困難重重。這場自然災害導致 4,800 人無家可歸，造成 20 億元以上的財產損失。傳統農業、養殖業可說是受創最慘重的產業，這也促使官員認真重新思考未來的產業發展是不是應該轉向更有韌性、更不易受颱風潛在破壞的產業。乾淨能源和太陽能發展似乎成了最自然而然的解決方案。

### **進行中的開發案**

#### **大鵬灣**

首先我們看看大鵬灣風景區 BOT 案。這是一個多面向的開發案，最終願景是打造國際級、全方位的休閒度假遊憩區，環繞一座國際標準認證的的賽車場；度假村的主題意象匯集陽光、海洋、空氣等要素。除國際級賽車場之外 ( 400 公尺直線加速賽道、road course 賽道、兩座環狀賽道 )，風景區還將包括有高爾夫球場、海灘、遊艇碼頭、水濱公園、卡丁車賽車場 ( go-kart )、超輕航機 / 輕航機機場、飯店、餐廳、主題國際購物中心和地方購物商場等。雖然此開發案已在進行中，但進展緩慢；今年屏東縣政府將積極推動加快開發進程。高雄美國商會認為這項計畫有潛力成為不只是全台灣 - 而是全亞洲最大的觀光景點之一。

賽車競技運動在亞洲越來越受歡迎，賽車同好的人數也不斷在成長中。事實上，這項運動為美國和日本賽車產業帶來擴展市場的龐大商機。在台灣發展賽車競技運動不僅可以帶動新車銷售量 ( 福特、GM、克萊斯勒車廠聽好了！ )，而且也將有助於發展高性能零配件、aftermarket 改裝零件、商品開發銷售規劃、服飾等相關周邊產業。高雄美國商會建議也應積極爭取大鵬灣成為車手訓練營的場地，委由可以提供培訓、認證車手的美國企業來舉辦、經營。培訓課程可以非常多元化，例如道路安全講習、賽車執照、為執法機關訓練特勤駕駛人員等。培訓課程對象可進一步擴大納入重機、

摩托車，甚至很適合駕照被吊銷的道路使用人來上課。提升道路行車安全一直是許多人對南台灣的期待。除了可使用賽道來測試各種車輛外，福特、克萊斯勒、GM 等車廠以及其他幾乎所有業者都可在此提供高性能運動車與賽車會員俱樂部等各種活動。取得更多國際賽車協會認證可對大鵬灣賽車場來說至關重要，因為就可能成功爭取更多國際級賽事到這裡舉辦。

賽車樂園度假村若搭配 Planet Hollywood、Hard Rock 等這類國際連鎖餐廳飯店將能相得益彰，他們應認真考慮到這裡投資。此風景區將匯集各式各樣的活動，因此很適合作為度假勝地。高爾夫球場將佔地約 70 英畝，目前正在進行環評。超輕航機 / 輕航機機場將佔地約 450 英畝，跑道長 450 公尺，目前正依地方法規進行評估審查。興建水濱公園已納入初步計畫中，需尋求資金挹注。

台灣正大力推動遊艇產業的發展（請見高雄章節相關討論），若可以在大鵬灣賽車場附近興建遊艇港，配合 F1 方程式賽事的舉行讓遊客到此彷彿就像到了摩納哥或是杜拜。此休閒度假村如果要真正經營成功就必須有配套措施完整的規劃開發。餐飲、活動、購物等服務不僅必須是台灣的佼佼者，也必須引入國際知名品牌。屏東縣政府將小琉球劃入大鵬灣風景區一併整合規劃，正積極爭取國際飯店集團到此投資。目前，從大鵬灣開車一小時範圍內就有優質旅館住宿可選擇，包括義大皇冠假日飯店、漢來、福容以及 85 大樓等。但一個蓬勃發展的休閒度假遊憩區對飯店房間的需求量很高，因此這個地區還需要提供更多的旅館住宿選擇。

此外，政府積極推動電動公車作為高鐵站與捷運站之間的接駁使用，以完備交通運輸路網。電動公車造價高，但南部發展的同時也須兼顧環保生態考量。這個地區的路聯外道路系統已很完善、並且養護情況良好。屏東縣府也希望發展氫能燃料電池汽車與機車，作為小琉球的運具。目前，屏東土地成本比鄰近的高雄低，這個優勢應能有助於屏東談成不錯的交易。因預期大鵬灣風景區開發帶來效益也已開始帶動當地房價上漲，但居民還不願意賣。

此 BOT 案政府注資部分將在 2013 年底到位。有數個財務狀況導致此成立已超過 10 年的開發案延宕多時，也因此引發民眾不滿越來越嚴重。既有建築物限高的法規問題將在 2013 年底解決，此舉將加快開發讓投資更具吸引力。縣府正積極協助大鵬灣發展交通運輸的部分，完工後將串連青洲濱海遊憩區。BOT 總投資額估計達 175.5 億元，其中政府已注資 50 億元，民間約 20 億元，後續也將投入更多金額。應該盡快完成修

改地方法規，擴大允許在大鵬灣及鄰近的墾丁國家公園進行賽車活動，才不會因為法律滯礙使投資人卻步。賽車場占地約 29 英畝，road course 賽道總長約 3.5 公里，目前已經開放使用，可以有限度的舉行賽事活動。2014 年 10 月是賽車樂園預計可以全面營運的期限，BOT 特許經營權到期為 2058 年。

## 綠能

屏東縣政府非常樂見於美國企業到這裡投資綠能產業。屏東縣積極發展太陽能和綠能產業，在林邊地區有三家太陽能面板廠，生產由台電收購。中央政府推動的「陽光屋頂百萬座」計畫，鼓勵學校、政府機關設置太陽光電系統，政府提供優惠電價保證收購 20 年，預期投資報酬可達 10-12 年。由於中國對自家面板產品課徵關稅的新政策，預料將會為台灣製造的太陽能面板帶來龐大的助益。

屏東的其他發展計畫包括選定約 20 平方公里的六塊厝農場，計畫於 2016 年開發為「屏東縣六塊厝綠能產業園區」，作為乾淨替代能源的高科技產業聚落。發展適合高齡長者安養與長期照護的「幸福村」，計畫預定在 2013 年中完成。和平陸橋附近的區域將開發為占地 71,149.4 平方英尺的購物中心與飯店，由政府提供土地與合理租金，也可能開放業者承購。從 2012 年 11 月開始，屏東縣府積極安排投資說明會吸台商回流與美資進駐屏東。

## 台南

台南是寶島台灣的宗教與文化之都，是擁有悠久歷史的一座古城，在古蹟建築物和地標的保存、修復上也是台灣做得最好的城市之一。在維護其豐富的歷史宗教文化特色之際，台南亟欲轉型為現代化全方位的城市，在發展轉型的過程中台南大多獨立自強，因此也面臨許多獨特的挑戰，尤其是其最老舊的社區一帶。儘管如此，台南也取得了非常顯著的成果，其達成目標的堅韌和決心值得外界讚揚。城市的首要目標包括生技、高科技、農業 / 養殖技術、生態技術等領域的產業發展，以及觀光旅遊業的成長，促使台南能成功招商引資，這需要時間且要有遠見。台南市政府擁有非常有能力的行政團隊及賴清德市長優秀的領導能力，再加上良好的教育設施以及一些台灣最強的企業領導人，為台南奠下紮實的根基，以建立他們的集體夢想城市。台南也是台灣面對自然災害最不易受影響的城市之一。

**群創光電**宣布擴大在台南投資約新台幣 50 億元 ( 172.65 百萬美元 )，加強研發與自動化機器設備。該公司有來源指出群創積極提升在全球面板市場上的競爭力，並協助台灣進一步作為開發更高附加價值產品的研發中心。來源也表示群創正推動建立一個更垂直整合的商業模式。這次在台南擴大營運的投資預計將創造 4,500 個工作機會。來源也提及儘管公司擴大投資，但群創 2013 年的營收預計持平。群創執行長段行健表示 2013 年的目標是全力衝刺觸控面板與平板電腦用的面板市場，並且將其 PC、TV 面板廠轉向生產獲利更高的觸控面板，以提高群創在智慧型手機的市佔率。

台南市政府積極爭取中央部分或全額補助市府推動的一些有趣、值得做的計畫。

**亞太棒球訓練中心**：台南希望打造一座棒球村可以提供各種層級的棒球培訓與服務，爭取成為少棒、職業棒球聯盟的訓練基地。台南冬天溫暖的好天氣後也可吸引韓國、日本的冬季移地訓練到台南。市府已選定訓練中心興建地點，但需要中央的補助。賴市長希望在其第二任期結束前盡可能完成這個計畫。國際棒球總會會長法拉加利 ( Riccardo Fraccari ) 已經到過台南勘察並受聘擔任計畫的最高顧問。台南目前正積極向國際棒球總會爭取，將亞太國際棒球訓練中心列為國際棒總在亞洲講習、訓練、比賽的主要基地。台南也希望吸引美商投資參與這個計畫。

**新台南博物館**已有完善的發展計畫，總工程經費為新台幣 19 億元，目前仍在籌措經費。



**高鐵直達車計畫：**台南持續爭取高鐵台南直達車，市府認為有很多數據顯示台南站的旅客量大，證明直達車是本地的迫切需求。有了直達車將有助於改善台北 - 台南的商務往來，並且帶動更多遊客來台南。為建立大台南會展中心，市府也與高鐵局合作，已選定在高鐵台南車站特定區中、面積約 2.57 公頃的商業區規劃開發設置。此外，為積極帶動會展中心周邊服務產業發展，市府已於 2011 年制定「臺南市獎勵會議展覽活動實施辦法」，提供最高額新台幣 80 萬元獎勵，增進舉辦展覽誘因，現階段與高鐵局積極合作辦理招商事宜。支持高鐵直達車計畫的數據包括 2012 年九天春節載客量，臺南站的總計輸運逾 21 萬人次，年節期間單日旅客量就打破 2011 年的紀錄。

**捷運化系統：**「台南捷運化公共運輸系統計畫」包括公車捷運化、台鐵捷運化、轉運站開發、彈性運輸、票證整合及先進運輸系統等內容，這項計畫也需要中央的資源補助。

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曾文、南化水庫清淤工程需要加速進行。三年前的八八風災重創這兩座水庫，造成水庫容量減少 1 億 1000 萬立方公尺，需要中央有關單位積極面對，加速清淤進度以避免造成南部農業、民生用水危機。

**鐵路地下化：**「台南市區鐵路地下化計畫」最初於 2009 年 9 月核定通過，工程從永康橋往南延伸，全長 8.23 公里。總工程經費為新台幣 293.6 億元，預計 2017 年完工。未來是否增設地鐵線與地下通勤車站將視地方需求而定，且需中央支持補助。該工程細部設計、機電系統設計、環境監測、周邊工程發包等作業正積極進行中。鐵路地下化是台南市未來發展的重大建設，也是城市發展的關鍵契機。

**國立臺灣史前文化博物館南科考古館：**整體計畫是為了保存出土珍貴的文物與文化資產，計畫總經費為 15 億元，惟至今預算仍未到位。

**防洪：**治水預算尚有新台幣 450 億元的缺口。十年來共爭取 150 多億元的治水預算。但根據水利署訂定的防洪標準，台南整體治水共需 600 多億元。在中央補助經費到位之前，市府需擬定治水應急方案，在單日降雨量不超過 250 毫米前提下，達成防洪標準。

**濱海沙洲復育：**這是不斷發生的老問題，需要長期解決方案以及中央經費補助（不確定中央主管機關是哪一個單位）。估計總經費約需新台幣 5 億元（這是總經費，而非每年費用）。紐約州長島的南海岸線海灘沙洲侵蝕的問題也引起很大的關注，當地建造一系列的緩衝塊抑制沙石的流動，在不影響沙灘自然美景的情況下大幅降低每年沙洲侵蝕的程度。這個解決方法也許在台南也行得通。

**安平港直航廈門：**安平港隸屬中央管轄，計畫投資新台幣 8 億 8 千萬元打造一座國際水岸公園。這個計畫當然有助於促成直航，同時也可帶動觀光旅遊收益使地方受惠。安平港距離廈門很近，因此這兩個港口的直航將可推升南台灣工商業從安平港外銷到中國大陸。

**中國大陸直飛台南：**四川機場已有代表和台南討論四川直飛航線的可能，台南也樂見於促成和中國大陸沿岸城市的直飛航線。便利的空中交通運輸是推升經貿、帶動觀光的重要關鍵，因此這項計畫必須慎重考量。台中、台南、屏東、高雄等都在積極擴建與改善城市機場，因此這是個複雜的議題。應先辦理可行性研究來決定投資規模是否對各個城市是在經濟上可實行的。招攬想要投資引進知名品牌購物和餐飲服務到這些機場設施的業者，這會有助於抵銷機場擴建改善計畫的成本、提高計畫成功的可能性。

**台南有 11 個姊妹市，**包括加州蒙特瑞市與聖荷西市、密蘇里州堪薩斯市、俄亥俄州哥倫布市、佛羅里達州奧蘭多市、阿拉斯加州費爾班克斯市、奧克拉何馬市、阿拉巴馬州亨茨維爾市、伊利諾州卡本戴爾市、德州拉雷多市、華盛頓州史諾霍米須郡等。近年來，可以很明顯看到姐妹市關係可以為雙方帶來顯著共同利益。台南應努力拓展和這些姊妹市建立更緊密的關係，發展更多雙邊教育、文化、商務交流的機會。

**建設新臺南十大旗艦計畫：**包括「投資大臺南」、「親水大臺南」、「文化首都創意城市」、「魅力城鄉觀光樂園」、「新農業、新農村、新農人」、「低

碳綠能大臺南」、「溫暖大臺南」、「安全大臺南」、「智慧城市大臺南」、「便捷城市大臺南」等計畫。這些計畫對台南的建設發展具前瞻性，將執行效益、預算評估，每季進行檢討，以符合市民需求、因應城市發展變化。

### 研究發展考核委員會計畫

- (A) 在提供無線寬頻網路服務上，台南希望可以成為台灣首屈一指城市。
- (B) 建立公開資料平台，提供更高品質、更方便使用的政府開放資料。雖然 Data as a Service (DaaS)這類型的內容服務尚未成熟，但此平台的建立可視為一個指標性的內容服務平台。
- (C) 農村智慧化行銷服務策略規劃：導入創新科技與適地服務規劃操作的方式，除可透過在地居民自主式發掘各農村特色外，更可運用其設計、創意來進行包裝行銷，發展該地的核心價值，創造當地的特色經濟。進而吸引青年人口回流投入地方產業營造，增進農村市場產值。同時，農村行銷服務模組平台可分期導入大台南各地特色農村，達到創立農村環境教育圈之遠程願景。
- (D) 行動觀光服務系統策略規劃：府城是南台灣集古蹟廟宇、地方國際特色美食、地方藝術工藝、購物、美景等於一身之旅遊勝地。依照現今創新行動服務 SoLoMo 功能特性模組 ( Social、Location、Mobile )，進行 APP 細部功能應用規劃，滿足府城遊客在旅遊中 Anytime、Anyplace 之需求。長期目標不僅成為國人可使用之觀光護照，更是具國際代表性的行動觀光護照。
- (E) 智慧電動車策略規劃：本計畫將調查發展各類電動車服務的需求，包括自行車、機車、汽車、公車等選擇。待整體規劃設計完成後，本計畫將針對各項增值服務需求，分期完成建置電動車相關增值應用服務，促進電動車服務計畫於台南開花結果，提升台南市民關注此計畫之程度，同時提高電動車運輸服務風氣。
- (F) 智慧電網策略規劃：1. 根據先進國家的經驗，台南智慧電網建置首要著重於先進讀表系統，即智慧電表的導入，以作為智慧電網佈建基礎。為了進一步能整合九份子地區所有智慧電表之用電資訊，並調配電力，本案將利用 GIS 系統作為電網整合平台，提供即時電力資訊、警報設定、電能產出分析、歷史資料查詢、即時趨勢圖表。2. 後續的建置目標為將台南打造為全台灣第一個擁有 100% 智慧電網的城市。

### 城市行銷

市府設有新聞及國際關係處負責台南對外國際關係之聯繫窗口，市政國際考察、城市行銷及外賓參訪行程規劃與接待業務等國際事務。在城市行銷則藉由多元媒體行銷管道，提升本市能見度。

### **經濟發展局**

透過設立國際招商單一窗口服務來建構友善投資環境，並且促進產業活絡發展。台南縣市合併於 2012 年 11 月底完成。台南招商成果亮麗，公司登記家數成長率 ( 2.79% )、商業資本額成長率(4.09%)，共計增加 491 件投資案，吸引 3,491.3 億元投資額，創造 4,925.56 億元產值及增加 33,831 個就業機會。

大台南會展中心計畫是為推動大台南整體都市發展，在高鐵台南特定區建置一座可容納 600 個標準攤位的多功能複合式場館。計畫目標是促成於 2016 年底前興建完成。

因應兩岸經貿往來需求的大幅提升，加上兩岸 ECFA 簽署後帶動的雙邊交流商機，目前積極推動安平港發展為自由貿易港區 ( 或自由經濟示範區 )，並促成兩岸直航，提昇港埠競爭力，以開創兩岸經貿交流整體能量。

### **台南特色產業**

台南特色產業包括：

橡膠製品製造業；金屬製品製造業，含金屬表面處理業；機械設備製造修配業；電腦、電信及視聽電子產品製造業；電力機械器材及設備製造修配業；運輸工具製造修配業，含汽車零件製造業；精密、光學、醫療器材及鐘錶製造業；食品業；液晶電視製造裝配業；光電材料及元件製造業；物流倉儲業；電力設備製造業 ( 電池組裝、照明設備組裝 )；汽車製造修配業 ( 電動車組裝、汽車組裝、油電混合車組裝 )；基本金屬製造業；化學材料製造業；化學製品製造業等。

### **教育局**

幼兒園登記方案以提升幼教品質並減輕家長經濟負擔，提供 2-4 歲就讀公立幼兒園免學費，是全面提升學前教育品質很重要的計畫。

推動終身教育，台南推動終身學習計畫的目標包括加強補習班管理稽查及公共安全考核；推動成人基本教育及新住民生活適應課程；鼓勵社區協力興學，培力公民素養，參與社會公共議題；建構樂齡學習空間，輔導社區大學發展及管理。

建置雲端教育，拓展國際視野：設置雲端教育中心，持續更新學校資訊教學設備；運用網路資源，協助學生運用科技，提供偏遠地區及弱勢民眾數位學習機會，縮減城鄉數位落差；提升偏遠地區英語師資，成立教師專業社群，提升教師資訊科技能力；打造南台灣天文教育園區；推動外語建置師資人力庫，提升國際英語村效能，加強國際交流。

### **新農業、新農村、新農人**

新農業、新農村、新農人旗艦計畫：

(A) 農村再生 (B) 新農業、新農村、新農人

1. 發展地方特色米計畫
2. 建立現代化蔬菜生產專區
3. 設置雜糧生產專區
4. 建置水果生產專區
5. 建立花卉生產專區
6. 推動設置養殖漁業生產專區
7. 水產品安全管理計畫
8. 輔導高生物安全之養殖模式
9. 無污染及節能畜產業
10. 補助社區執行綠美化
11. 發展農漁村產業文化及農村旅遊
12. 打造觀光休閒漁港

### **2013 年重要計畫**

- (A) 建置農業生產專區，發展新農業。
- (B) 廣續建設養殖漁業生產專區，提升水產品質量。
- (C) 加強畜產飼料及飼養管理，確保畜產品衛生安全。
- (D) 落實犬貓源頭管理，推動流浪犬絕育及工作犬認養。
- (E) 舉辦第一屆臺灣國際芒果節及 2013 臺灣國際蘭展。
- (F) 辦理漁港公共設施工程、遊艇修造及商業用地標租與觀光魚市直銷中心營運。

(G) 辦理野生動物、珍貴樹木保育，加強溼地保護，營造生物多樣性。

(H) 輔導推動有機農業、產銷履歷、吉園圃，生產安全健康農產品。

### **觀光旅遊**

為提升觀光旅遊產業，未來政策推動目標如下：

開發具有重大歷史意義的文化遺產，成為文化觀光聚焦所在，不僅可以帶動觀光旅遊產業成長，也能為城市創造收益。伴隨悠長歷史的是其豐富的飲食文化，而台南有很大優勢。一般而言，台灣食物產非常多元，可以說是一鄉一特產、一鄉一特色。台南更是因為其廣大農田、宜人氣候和全年適合種植的優勢成為全台著名的美食天堂。事實上，很多遊客到此就是特地為了要嚐遍在地美食小吃；在飽嘗美食之餘，順道走走悠遊府城的美麗風光，不僅滿足味蕾也豐富了視覺享受，還可消耗剛剛食指大動後的卡路里。在台南有東山咖啡、玉井芒果、新市白蓮霧、善化清燙牛肉、下營鵝肉等各種數不清的地方特產。

### **外商直接投資 ( FDI )**

台南縣市在 2010 年 12 月 25 日合併升格為直轄市。和高雄一樣，縣市合併後帶來許多挑戰，但也創造更多契機。最主要的挑戰在於將前台南縣地區推升至城市標準層級，為教育、商務、人民建立公平公正的環境，而這不是簡簡單單就能做到。然而，合併後可用土地面積與人口大增，創造了全新的投資、發展和城市營收的領域。此外，新資產包括打破舊有縣市劃分帶來的產業，也開啟許多農業和旅遊景點。一旦不用受限於府城邊界，未使用或未充分利用的土地開發將變得相當不同。面對城鄉合併的經濟發展新局面，台南於 2012 年初新設投資商務科，作為台南全球招商單一服務窗口，協助有興趣投資廠商解決土地取得、廠房設立、工商登記、勞工及環保法令等相關問題。

### **五大新興產業**

台南嘗試吸引與支持生物科技、綠色能源、智慧電動車、智慧綠建築及文化創意 ( 流行時尚 ) 之特定產業進駐台南，帶動台南產業與服務升級。

農業的經貿發展是核心目標，結合生物科技與原本就很優質的農業產業。台南若要成為綠色低碳城市，就要積極推動綠色能源產業、智慧電動車與智慧綠建築。另一個核心目標是台南成為國際觀光文創休閒重鎮為核心目標，發展具潛力之流行時尚業、文化創意業與都市更新，並整合台南歷史文化資源與傳統工藝產業。產業升級策略包括輔導等措施，協助投資者因應環境變遷，同時整合台南市本身產業競爭優勢，以期

能優化長期投資環境，促進工商業發展及就業成長，提升地方繁榮發展，提高中央相關政策的能見度，共創雙贏。

## 教育

深化技藝教育，發展適性學習；規劃適性、多元課程及輔導生涯發展；落實常態編班，建立補救教學機制；提供弱勢學生免費午餐及教科書等補助；提供特殊境遇及弱勢學生免費課後照顧服務；開辦身心障礙學生寒暑假及課後照顧專班；落實身心障礙學生融合教育及研發普通班之簡化教材，達成教育機會均等的理想。

其他發展台南教育部門的措施包括建構優質文化，強化校園安全；提升教師專業發展及校務評鑑機制；持續辦理老舊校舍拆除重建、校舍結構安全補強，校園歷史建築保存等。

台南市政府致力於結合在地大學讓高中職與大學合作與銜接，與在地產業合作讓學生順利進入職場，相關配套措施如下：技職教育與大專院校及產業合作，進行策略聯盟。鼓勵台南地區 18 所大專院校與附近高中職建立策略聯盟與教育夥伴關係，進行資源整合與共享，以建立橫向聯繫與垂直整合機制，帶動社區教育學習的有效發展。

透過各種教學活動、研討會、觀摩會、競技比賽及專題製作等活動，促進高中職對社區大專院校的深入了解，進而提升學生就近入學的意願。

1. 配合大專院校發展學校本位課程，促使課程設計上能有效垂直整合，並更能因應社區的特殊需求，發展在地化特色。
2. 成立大台南教育資源整合中心，進行經費、人力、物力、空間等任務分工，以創造最正面的學習環境。
3. 策略聯盟的方式分成教學、研究、服務、設備資源整合及行政支援與協助等五大方面，以積極推動校際交流。
4. 選定有意願合作之廠商，由高職、大專院校及合作廠商共同規劃研提合作計畫，並優先招收家庭經濟弱勢之學生。

5. 結合技職教育與產業發展，建立以兼顧就學就業為基礎之新教育模式，落實國中技藝班及職業試探體驗活動加強國中生涯發展教育。
6. 開設技藝專班與技藝學程，提供學生自我探索、生涯探索、觀察模仿、模擬概念及實作技巧等核心能力。
7. 辦理高中職適性升學制度宣導，協助學生依性向、興趣、志願、或在校學習各項表現等做為進路發展之依據。
8. 結合證照制度重視理論與實務教學，發揚技職教育「做中學、學中做」實務教育之辦學特色。
9. 推動學生實用、活潑、多元技藝課程，落實高中職多元升學進路輔導。
10. 學校結合區域或相關產業共同規劃「最後一哩」就業學程，以協助轉銜至產企業界，並輔導充分就業為主要目標，強化學生再學習、跨領域創新及實務經驗。
11. 學校與合作廠商建立多元雙向的對話平台，結合資源共同規劃開設產業需求之課程，培訓符合產業發展及需求之專業技術人才，縮短學校人才培育與業界人才之落差。
12. 建立學生能力評量機制，評估學生現有能力和就業能力差距，開設專業補足性課程。



## 結論

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高雄美國商會第四年度的南台灣白皮書擴大內容，針對一般性的議題提供更全面的概述，並且納入和高雄、台南、屏東等三個縣市有關的議題。此次有一個主題貫通全文：南台灣正快速發展為更乾淨、對環境更友善的地方，地方及中央政府的施政重心均放在招商、促進就業並且兼顧環境改善。台灣中央政府已做了許多努力編列預算補助數個發展計畫。面對全球債務危機和美國經濟停滯不前的問題仍舊擾人，再加上中國、南韓、印度、墨西哥、巴西等競爭情勢變化，台灣仍面臨許多嚴峻挑戰。然而，這些變化不僅為台灣帶來新的機會，也為到亞洲擴大市場版圖的國際社會帶來契機。台灣人民堅強的創業家精神與創新能力也許是其最大資產，但地緣政治和全球經濟情勢的變化都有助於使台灣成為更具吸引力的經商地方。

和南部地方官員的訪談中很清楚發現，所有地方政府均積極辦理國外招商，而且明顯偏好吸引來自於美國和日本的投資。在本次白皮書中提到的開發計畫，絕大多數對美國企業而言是處處有商機。台灣長久以來致力於和美國建立各種互惠互利的商業關係，這種心意有增無減。但南台灣需要投注更多心力進一步了解國外投資者及外商的在台需求。一個對台灣特別有機會的地方是台灣極有潛力擔任為美中商業機會牽線的聯絡人或中間人。最近一項調查發現，在中國經營的美國企業有 40% 已經準備好要放棄在中國的營運設施。

對於想要到中國做生意卻又因擔憂智慧產權被侵犯或缺乏對中國語言、法律、文化的認識而選擇不去的企業來說，台灣提供了許多優勢。台美情誼悠久，雙方建立了各種商業關係，多年來也緊密維繫這些關係。台灣是個欣欣向榮的民主國家，遵行法治且有許多和美國相當類似的標準及規範。政治上、文化上、經濟上、地理上、策略上和物流後勤上，台灣是美國很完美的合作夥伴，從各方面來看都呈現了巨大的機會。無論是對那些第一次到亞洲投資的公司，或是已經在這個地區的企業，或是那些曾經離開台灣為指望更低製造成本和勞力成本卻落空的企業，南台灣都值得他們一探究竟。

**南台灣具備以下六大優勢，包括：**

1. 優越的地理位置和物流條件

2. 優良的海空雙港與全年氣候舒適宜人
3. 完整的產業聚落
4. 充沛的人力供應
5. 完整的產業交通網路
6. 完整的提供外商良好的食衣住行育樂

高雄美國商會

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