



American Chamber of Commerce Kaohsiung Taiwan
高雄美國商會

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ABOUT

About American Chamber of Commerce Kaohsiung Taiwan :

The American Chamber of Commerce in Kaohsiung (AmCham Kaohsiung) serves as a forum and representative body for U.S. and Taiwanese firms. It helps American companies integrate into the Southern Taiwan business community and allows firms in Taiwan to build better ties and associations with American firms. AmCham Kaohsiung assists American companies wishing to invest or trade in Taiwan. To achieve this, AmCham Kaohsiung works with the American Institute in Taiwan Kaohsiung Branch as well as the US Foreign Commercial Service in Taiwan, the American Chamber of Commerce in Taipei and the US Chamber of Commerce in Washington.

高雄美國商會簡介：

高雄美國商會為台灣及美國企業之間的溝通平台以及代表，使美國企業能更融入南台灣的企業環境，藉此幫助台美兩方企業建立更深厚的合作關係。為了幫助願意在台投資的美國企業，高雄美商也積極與下列組織合作：美國在臺協會高雄分處、美國海外商務服務處、台北美國商會以及華盛頓美國商會。

ACKNOWLEDGEMENTS

AmCham Kaohsiung is proud to publish its third annual White Paper in 2012. The excellent response and support we received while creating it merits acknowledgement. Officials from the City of Kaohsiung Mayor's office and Tourism Bureau, the Southern Branch of the Executive Yuan, the City of Tainan headed by Mayor William Lai, and Pingtung County Vice Magistrate Jhong Jia Bing 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 who got involved. Their combined efforts provided us with an exceptionally complete government perspective on a number of issues. AmCham Kaohsiung would also like to thank Ms. Frances Lee, from the National Immigration Agency, Kaohsiung City First Special Operation Brigade for supplying us with statistical data used in this report as well as her time and efforts regarding all things Kaohsiung. We received so much cooperation, insight and support from many key industry leaders during the entire process of putting this paper together. 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 for all the efforts and support from the American Institute in Taiwan (AIT), who were always tireless in their efforts to help in facilitating our project. And finally, we would like to thank our colleagues at AmCham Taipei for their valuable assistance and giving us the benefit of their 60 years of excellence. 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. In light of recent events such as the European Debt Crisis, the ongoing impact of the Economic Cooperation Framework Agreement (ECFA) and the City/County mergers in the south, this White Paper carries greater significance because it deals with issues that are critically important to creating a solid foundation for the future growth of Southern Taiwan. It is also in the interest of the Taiwan public at large, as 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 for a better future. Thank you for your attention.

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INTRODUCTION

2011 was a very positive year for Southern Taiwan. The ECFA agreement was beginning to show improved results, mergers of municipalities were becoming better integrated, and many development projects were underway.

Now that these foundation blocks are being set, it is time to look forward into how future development will impact Southern Taiwan in light of global economic stresses.

The end of 2011 and beginning of 2012 brought significant steps in trade and relationships between Taiwan and the world. The tourism industry, while still in its relative infancy, has already shown its potential as a major revenue source in the future economy.

Airport, harbor and marina modernization and internationalization efforts to make them as user-friendly to the world as possible are underway. Shipping, tourism, foreign investment and a series of development projects are coming together, with the goal of firmly establishing Southern Taiwan as a place where cargo will be trans-shipped, people will vacation, companies will invest, and corporate leaders and staff will relocate and live, and where high-tech and clean energy manufacturing will be among the many highlights in Taiwan's southern city portfolios.

For Southern Taiwan to become truly great, it must continue its efforts to Connect, Communicate, Coordinate, Cooperate and Compete. Each aspect of developing the future needs to maintain this "5-C" policy. To that end, each aspect of this white paper is interrelated as are 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 and initiatives.

Throughout all these improvements and developments, significant opportunities are available for Taiwan entrepreneurs, American businesses and international corporations that should not be overlooked nor underestimated.



Brian Aiello

President

American Chamber of Commerce Kaohsiung

This third edition of the Southern Taiwan White Paper is written and published by the American Chamber of Commerce in Kaohsiung (AmCham – Kaohsiung). It includes an overall assessment of Southern Taiwan's business climate, a review of the current priority issues for 2012 identified by the Chamber, as well as recommendations for each topic. The primary purposes of AmCham-Kaohsiung's annual white paper are understanding, information, and 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. All rights reserved. ©AmCham Kaohsiung

KEY RECOMMENDATIONS

KEY RECOMMENDATIONS

2012 will certainly be a year of new opportunities and challenges for Southern Taiwan. After the signing of ECFA, presidential elections and recent city/county mergers, there is much work to be done. The European debt crisis adds further complications into the economic mix.

- The expansion of EDZs (Economic Development Zones) and establishment FTZs (Free Trade Zones) is urgently needed in Kaohsiung, Tainan and Pingtung. More consideration needs to be given to the needs of potential business entities that might relocate here in Southern Taiwan. To enhance business here, we must “market” our cities as the best place to do business. In order to really attract foreign investment and business, we must understand their needs, and what our competition is offering. Potential investors and businesses want to know, “What does your city offer me, to help me relocate and grow my business, to help my investment see a return”?
- A greater level of communication and cooperation between local and central governments was a common issue raised. In order for the south to see real growth, the central government 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, more people will benefit and so will the political atmosphere.
- Look for new ways to cooperate with Sister Cities to enhance current relationships and learn from their successes and mistakes in their efforts to become more environment-friendly, more competitive, safer and more attractive to tourism.
- In development projects where big investment is needed from the private sector, the government should consider more attractive terms, especially for the “big names” that would themselves attract additional smaller but equally important investment that will create a more complete and successful project.
- Consideration should be given to having several professional and renowned city planners look at potential development areas and create their vision of what would make the best scenarios for the future economies and needs of Southern Taiwan cities. It is more difficult for local planners to get a “fresh” perspective. This is not a

judgment, only a fact of life. If the goal of city development is to create a more international and cosmopolitan city that will attract more foreign investment, then perhaps an outsider's perspective can be quite valuable for future planning. City planning needs to look at the big picture; how each area within the given city can be developed to complement other areas and projects. As a case in point, Taichung's financial, commercial and government centers offer what might be the best example of how development should be coordinated. The areas on both Taichung Port Road and Wenxin Road rival any metropolis in scale, grandeur, architecture, and living space. Foreigners that visit these areas come away with the feeling that, "I can live and do business here".

- Attracting new and/or foreign investment in Southern Taiwan is a matter of proper marketing. A city needs to ask some specific questions while developing their marketing strategy for bringing in good investment. What does this city have to offer in terms of logistics, friendly taxes, free-trade zones, investment and relocation initiatives, commercial and industrial space, human resources and a trainable workforce (a skilled workforce that can get things up and running quickly), good stable climate (political, economic, health & safety, environmental, 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 other potential 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 that will attract tourists as well as foreign companies, their international employees and families?

- Singapore, Malaysia, Thailand, Indonesia and the Philippines are all seeking tourists, investment and foreign companies. Singapore is perhaps the most successful in Asia. Southern Taiwan needs to be better at marketing and competing with these areas if it is going to see real improvements.
- The south looks to make its mark in the solar industry in a big way. Economic factors in Europe which are cutting back on solar subsidies can make this a good move for Taiwan. With lots of sunshine days, and available land, the solar industry should be right at home in Tainan, Kaohsiung and Pingtung alike. By developing this industry, solar power can also help to reduce the carbon footprint for energy in Southern Taiwan. Recent statements by the central government seem to indicate that there is a willingness to make solar power accessible for residential and commercial use. Green energy is a growth industry which will stimulate the

economy, create jobs and raise the image of Taiwan.

- Ensure that easy access and support industries are designed into all development projects.
- Organize visits from American companies to Southern Taiwan with coordination by government agencies such as TAITRA, AIT, MOFA, MOEA, as well as AmCham, for the purpose of discussing the great investment opportunities here. The proposed development of clean, high-tech industrial and science parks should be well-defined for potential investors.
- Work with initiatives, low cost financing and grants to help our traditional Petro-Chemical industries modernize in ways that will not cause any unnecessary mass exodus that will harm local economies and employment, while giving them the resources they need to become more in line with the environmental vision for Southern Taiwan.
- Continue outstanding efforts to enhance Business Development: Having easy access to comprehensive investment information is vital to attracting new opportunities in the city. This information needs to be able 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.
- Do give serious consideration to “typhoon-proofing” areas where

new solar 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 partnerships between American and Taiwan companies regarding the growing emphasis on solar power centers for Kaohsiung, Tainan and Ping Tung, where the geography, climate and people are all perfect for development together.
- Explore additional clean energy resources such as hydrogen, wind, water and geothermal, so that more of the power needed to meet current and future demands comes from renewables and environment-friendly sources. Make solar and wind power viable alternatives for small-scale residential and commercial properties as well as large-scale commercial and industrial sites.
- Establish relationships that will help to create a true international resort in DaPeng Bay, Pingtung. This project represents significant opportunities for the US, which is welcome by local government leaders who understand the potential two-way benefits that such partnerships can yield. This project will include a motorsports complex, marina, water park, go-kart track, light plane airport, golf and beach.

EXECUTIVE SUMMARY

Southern Comfort & Big Dreams

Difficult Challenges Ahead

- Development requires serious attention to access, traffic congestion and parking.
- The European Debt Crisis and competition from Mexico, Brazil and China will continue to place more emphasis and demands on Taiwan's creativity and business abilities, even with any benefits that come from the signing of the ECFA.
- A transition from traditional heavy industry manufacturing base to a cleaner, higher-tech economy will lead to real sustainable growth and economic development. Focus should be on renewable energy, foreign investment, tourism, and corporate relocation to the south.
- Continuing steps to make every effort to maintain traditional industry while providing support and resources to assist upgrades to make them cleaner and more efficient.

ECFA and the WTO

- The Economic Cooperation Framework Agreement (ECFA) is now another year older.

Southern Taiwan needs to continue to take full advantage of ECFA's benefits to enhance development while taking steps to minimize any negative impact. The entrepreneurial spirit and creativity of the people in Taiwan is an amazingly strong force.

- Taiwan must use ECFA to strengthen its business base while ensuring protection of intellectual property rights and continuing to promote a more stable situation in Asia. The door is now open to form new trade agreements throughout the world, and Taiwan must aggressively go after each opportunity for growth.
- Manufacturing in Taiwan needs to give its strongest efforts to promoting "Made in Taiwan" branding, as a world leader, while at the same time working to get a better understanding and compliance with worldwide standards. Think "Made in Taiwan, Used Everywhere"

Providing a Balance

- Education and training must be an ongoing developmental project and a vital part of Southern Taiwan's future. Educate and train according to future needs so that when students make the transition into the local workforce, they are best prepared with the talents and skills that are most needed.
- Renewable and sustainable energy will dominate the economy for decades to come. Taiwan must continue to seize this opportunity to be a world leader in clean energy so that we can exchange ideas and technologies with our friends, develop innovative solutions and export a better future to our neighbors. Southern Taiwan has ideal conditions for the development of clean energy technologies, demo projects, and integration.
- Job losses will continue to be both a challenge and an opportunity for real growth as local economies make the transitions into new and clean industries. Local and Central governments, and educational institutions must work together to provide training programs for those who lose jobs; at the same time, redirecting the overall

education system to suit the career needs of Taiwan's future.

- The government must continue to work very closely with the business community to fill up vacant commercial space.
- Integration of English and Japanese for signage and increasing public proficiency is also a big part of the ongoing upgrade in the south so that it will maximize its ability to attract quality tourism, foreign investment and robust growth. Much has been done already, but efforts need to be, expanded and improved.
- Continue efforts in creating online portals and easily accessible resources that accomplish 2 important goals. Clearly showing how this is the best place for investment and why international business wants to establish itself in Asia by coming here. Stress quality of life, quality of human resources and quality of our products.

Education

- Continue with developing a "Model E-Learning" program to ensure that students and teachers receive proper equipment and software training to reap the maximum benefits this can provide.

- Continue and expand ongoing dialogs between the local government and educators to ensure learning institutions get what they need after the merger to prepare students for careers in green technology, science, engineering, high-tech, and the sports, leisure, and tourism industries.
- Continue, establish and expand relationships between Southern Taiwan cities and its “Sister Cities” to ensure greater exchanges and cooperation.
- Continue working with local schools and foreign teachers in order to better understand what is best for students, and how to more easily 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.
- Continue to promote and expand an Internationally Oriented Education. As with many primary and secondary schools, and the vast majority of university courses that utilize American textbooks, a multi-layered approach with source material coming from a number of different countries is proven to give students a world-class perspective on curriculum at any grade. This leads to better opportunities and career choices.

Amending Regulations for a Better Post-Merger Business Climate

- Regulatory efforts must be attractive and friendly to foreign investment while ensuring long-term domestic business growth. Look at what steps have been done in cities that are the most effective at attracting foreign investment and model local regulations to be competitive with the most successful policies.
- Coordinate tax benefits and incentives with changes in land acquisition regulations and ensure the availability of domestic project financing to non-Taiwanese, in order to promote new business and expansion. Local measures should be comparable with those cities that are the most successful at attracting, and keeping new foreign business.
- Local governments and the Ministry of Economic Affairs Industrial Development need to continue their cooperation in order to best serve the future growth of Southern Taiwan.
- 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.

Private School Education

- Much work remains to be done in raising awareness on the needs and values of private schools in Southern Taiwan. It is essential to encourage and support international schools if we want to have truly international cities. Many local international schools need continual assistance from local governments in the areas of land, facilities and in obtaining permits to renovate or build on existing campuses. Private schools must 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.

Local Education Enhancements

- High level educational institutions that offer degrees in the arts are well suited for many students in the

south. Continued upgrades to “National University” status will provide better funding and career opportunities.

Power for the People

- With the expected increases for energy that will come from completion of the variety of projects and continuing development of the tourist industry, future energy needs need to be determined, planned for, funded and built in order to meet these demands. Focusing on clean and alternative energy sources, upgrading existing facilities, and allowing for innovative methods of conserving and generating electricity should be a priority,

The Big Picture

- Kaohsiung, Tainan and Pingtung must continue their efforts to firmly establish and maintain six (6) key advantages for attracting foreign investment, 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;
 6. Complete provisions for foreign businessmen including excellent accommodations, restaurants, mass transit, and entertainment.

TOPICS

1. KAOHSIUNG

The merger's main challenges so far are in issues related to raising the former county areas to city standards.

ECFA return has not been as positive as hoped for thus far, although the greatest boost has been in fruit & fish businesses.

Results from both the merger and ECFA will take time to develop, and require continuous attention to make sure everything is being done to realize the greatest potential.

New developments

There is a focus by the Uni-President Group to develop international investment around the Dream Mall area that is part of a new "DC21" program.

AIRIS is a company wanting to develop air cargo out of Kaohsiung

Rhythm & Hues a special effect company from the US is also coming to Kaohsiung.

3 areas in Kaohsiung are being earmarked for industrial development, with a current target of 45% private/55% government stake in terms of development.

2015 will see CPC close some of its facilities that are now within sight of the ever-expanding metropolitan neighborhoods. While the environment requires changes in the traditional economic landscape, it is vital to work closely with long-standing manufacturing and industrial partners to assist in helping them to make the necessary improvements that will ensure a smooth transition and a robust future.

Kaohsiung unemployment numbers are about 0.5% above the rest of Taiwan, and re-employment is of primary concern. Underemployment and/or unemployment are blamed primarily on the numbers of companies that have left the Kaohsiung area without replacement opportunities for new jobs. Kaohsiung looks to have central government assistance in helping to create Solar Industry Development (Pingtung & Tainan have also expressed similar aspirations for developing major solar energy industries).

Wage stagnation is also a major concern, as is its contribution to a growing wealth gap. The recent elections saw a 74% voter turnout which is actually low for a Taiwan presidential election cycle. Some have expressed a connection between increasing wealth gap & low voter turnout, and that if the gap continues to increase, voter turnout will decrease. Regardless of the possible connection, it is vital for the Taiwan economy to grow in all sectors. Fortunately, Taiwan is a great place for entrepreneurship to flourish given proper support.

The Convention Center & Yacht Manufacturing Center should be completed by the end of 2013, and in operation in time for the 2014 International Boat Show. This can be seen as the birth of a major industry for Kaohsiung, and we must do everything we can to ensure its success.

The sister city relationships with Kaohsiung need further nurturing to enhance growth. In May & June of 2011, during visits to 5 of Kaohsiung's sister cities in the US (Seattle, Portland, San Antonio, Tulsa & Miami), all had one similar theme repeated; a desire to have a closer and more mutually interactive exchange with Kaohsiung. Fortunately, Mayor Chen has taken it upon herself to make a recent visit to LA & Miami. Additional visits should be planned, particularly to San Antonio, Seattle and Portland who place a great deal of importance and support concerning the sister city program. In particular, Kaohsiung & Miami can look towards working closely together on both the boating & Digital Content industries.

Kaohsiung is also looking at expanding the MRT & light rail, which is a good thing. However, calls for investment in the expansion have yet to yield any suitors. The city has said that they will build it themselves, but that will also be quite difficult to fund and finance.

In tourism, Kaohsiung saw a 43% increase in visitors from China, however a loss in visitors from elsewhere. Overall totals were quite similar showing that gains in mainland Chinese tourism are negated by lower numbers from other countries. What is potentially most troubling is the amount of money spent by those tourists. While 3.65 million tourists is a pretty good number, it still highlights a number of issues that need to be addressed. The HSR has indeed helped tourism quite a bit. Easy and quick access to the south is critical for tourism. Eco-tourism, backpackers and luxury seeking tourists are all important. Changes that would allow for individuals from China to visit Taiwan as tourists can help attract visitors who are more concerned with having a memorable travel experience, rather than those who seek only the cheapest travel bargains.

Funding for infrastructure projects to help develop tourism is split about 50/50 (local/central governments). The city needs to present plans for development projects each year in October. Then funding is released to the city based on the priority of items in the plan. With this in mind, the central/local governments need to communicate & cooperate as much as possible.

The completion of the yacht manufacturing center, convention center and increasing the number of international flights into and out from Kaohsiung are the most vital projects to focus on at this time. International flights expanded from 26 destinations in 2010 to 50 destinations in 2011.

It should be mentioned that it is extremely important to remain focused on the “Big Picture”, even when pouring over the smallest details. Travels throughout Taiwan have revealed some interesting things. Development in many Kaohsiung locations seems to be somewhat disorganized and disconnected.

According to city officials, petroleum and its bi-products are still responsible for the worst pollution; 3 industrial power plants and China Steel were cited in meetings with officials as being the worst polluters. The EPB (Environmental Protection Bureau) wants to begin fining the worst polluters. These industries are among the oldest in the area and must be dealt with firmly, but with consideration.

There is a long-standing issue of Kaohsiung companies with Taipei HQ's, having unbalanced tax revenue going to Taipei. This is a policy issue that we prefer not to comment on. However, efforts to create a more balanced economic situation will result in continuing growth for all of Taiwan.

Although 9 major development projects by the central government were announced last year, not much progress is apparent. Some in the city government say that resource allocations might be worsening, not improving, although at the time of this document's publication, no data was received to support or rebut this claim. These 9 projects should be considered to be of great importance to the future economy of the city, and therefore given priority status. There are many opportunities for international involvement in these projects, and efforts need to be doubled to ensure that potential contracts and opportunities are readily available to the international community via appropriate and coordinated online, TAITRA, MOEA, and MOFA resources.

EPZ's

Problem:

The local Economic Processing Zones (EPZ's) have excess manufacturing capacity in terms of manufacturing work space and labor. In other words, there are more potential workers and commercial spaces available than are in demand.

Theory:

This excess capacity can be addressed through a combination of efforts from the local economic development bureau, the economic processing zones government, and commercial brokers and investors.

Background of EPZ Problems:

1. Too many buildings in EPZ's are too old and cannot match the requirements of most high-tech product manufacturing plants (which the city wants to attract to these areas).
2. Unlike local manufacturing companies, most MNC's (Multi-National Corporations) or MNE's (Multi-National Enterprises) are not willing to put substantial capital to buy / build their own manufacturing plants. Renting a "build to suit" manufacturing plant is the most preferable real estate strategy for most MNC's/MNE's.
3. Currently, MNC's in EPZ's can only rent the redundant spaces released by the local building owner (who is also the main occupier of the building). However, most local manufacturing companies are not willing to lease redundant space in their buildings to other companies for long term because the building owner might then sacrifice their flexibility to expand their operations in the same buildings if the redundant spaces are leased for long term.
4. Renting space is hampered due to the EPZ regulations requiring 50% occupancy of space by the landlord. In many cases, the landlords do not utilize 50% of their existing building space for manufacturing.
5. Thus, the building sale and leasing markets in Kaohsiung EPZ's are very quiet. Only few real estate brokers will focus in the market of KEPZ.

Recommendations:

1. Allow long term real estate investors to invest in EPZ's and develop the manufacturing plants in EPZ's for long term leasing purposes. Two advantages: (1) speed up the redevelopment of old manufacturing plants into the new ones which better match current requirements of hi-tech manufacturing companies; (2) build high quality manufacturing plants (i.e. build to suit) and lease to MNC/MNE for long term.
2. Local economic development agencies can partner with commercial real estate brokers to promote the advantage of EPZ's globally. If the development agencies identify any foreign manufacturing company interested in establishing plants in an EPZ, then the real estate brokers can help this foreign manufacturing company to find real estate developers / investors which will build and lease the manufacturing plant in an EPZ for them.
3. The administration office of an EPZ should not require all occupiers have to develop high-rise manufacturing plants (i.e. more than 3 stories) in the EPZ. In fact, usually, a low rise building (1 to 3 stories building) already in the area meets the requirement of single occupier. The administration office of an EPZ should not force the occupier to develop a high rise building with the building area which is more than the actual area requirements of that occupier. This will highly increase the development cost and force the potential occupier to drop the plant establishment plan in that EPZ.
4. Allow greater flexibility to existing landlords to sublease their manufacturing space. Using local economic development agencies partnered with professional commercial real estate brokers to match existing facilities with suitable MNC's looking to invest in Taiwan. These partnerships can be short, medium and long term depending on the needs of both the existing landlord and investing MNC. This will fill the gap of landlords who have excess space, but do not know how to value, market, or develop the space. Commercial real estate brokers can manage these spaces for the landlords and provide greater economic benefit for the Kaohsiung region.

2. PINGTUNG

Central government money has been allocated for ongoing repair/rebuild projects related to the damage caused by typhoon Morokot. No funding for new projects related to the typhoon damage has been allocated however.

Perhaps the number one focus for development in Pingtung County is in Solar Energy, especially to offset the impact of nuclear energy.

ECFA has provided no significant change in agriculture in Pingtung. A main concern is that food imports coming from China need to meet standards for quality and health.

There is a county initiative to lend land to small farmers to help nurture growth in agriculture in the county. An experimental project would see land from Tai-Sugar.

A “Peace Corps” type NGO might help to compensate for the shrinking size of the military, and offer viable alternatives for young adults to provide community service while earning credits of financial assistance for higher education. This might also help grow a community service-based industry and provide a good environment for future government jobs. It would also help to stimulate the economy in a direct way. Funding would help local Corps members and their families while providing direct quality of life improvements to the community.

For Pingtung, it is important to continue to shift higher education focus more towards the arts than sciences, as it would create more benefits to the local population’s culture, talents and history.

It is also important for the central government to continue in its efforts to merge existing schools and upgrade them to national status which would bring in better and much needed funding.

The main industrial growth sector for manufacturing is in second generation processing or assembly rather than core manufacturing from raw materials. This should allow for more environment-friendly industrial development.

There is also a need for improvements in transportation infrastructure in the form of expansion of the rail, light rail, the HSR and MRT systems. Highway 3 & 88 have helped road access tremendously, but Taiwan is moving forward with mass transit projects, and Pingtung should be included as economic development makes mass transit more viable. Mass transit infrastructure development should be planned to complement economic development projects so that access can keep up with increasing demands. Access is one of many important factors in attracting foreign investment.

The potential growth in the B&B (Bed and Breakfast) industry can be helped greatly by loosening existing regulations.

Pingtung also looks to develop eco-tourism as well, since it would work well with existing conditions in the county.

DaPeng Bay (A.K.A. The Pen Bay) is a planned multifaceted international resort area that will eventually include a motorsports complex (nearly completed), go-kart track, light plane airport, water park, beach, golf course and marina. Historic buildings have been preserved and renovated for use as on-site hotel rooms and museums. It has been stated that the central government will give serious consideration to and support funding of economically viable projects. In order for DaPeng Bay to meet these requirements, several steps need to be taken. Fortunately, it does seem that available land is well-suited for this resort's development plans. The existing motorsports complex will accommodate up to 30,000 spectators. However large this number seems, it must be said that international racing events can attract well over 50,000 people a day. That means access by air, sea and land must be able to accommodate this level of traffic, and have room for expansion. The owners and management of this resort must always consider implementing flexibility into all areas of resort development that will allow for growth as needed without major disruptions in event planning and execution. In order for this area to meet its full potential, some major names must sign onto the project. These would include hotels, restaurants and other resort theme related enterprises. The Hard Rock Resort and/or Planet Hollywood are among the caliber of franchises that should be courted. For motorsports, the track is certified for FIA Grade 2. It should also be certified and sanctioned by organizations according to the type of racing and events they wish to promote. It will be a challenge, but the higher the level of sanctioning, the greater potential for high-level sponsorship and events. In addition, this will affect the number and quality of support businesses like restaurants, merchandise, etc. In other words, the better the level of track sanction, the more attractive sponsorship and supporting

business will “buy-into” the plan. Proper attention needs to be given to safety training, not only for emergency crews but also for drivers. Programs to teach high-performance driving skills to amateur and aspiring professional drivers will also enhance and promote safety on the roads. Although there is an onsite medical facility and helipad, proper training and staffing will be required that meets official requirements. In addition, efforts are needed to coordinate between the facility and a properly equipped and staffed nearby hospital; perhaps I-Shou hospital which is only 10 minutes away by helicopter. Merchandising should be aligned with the themes of the resort and mainly international in nature, but with local representation as well in order to be attractive for all visitors. The same should be for restaurants and food vendors. If this venue is to be accepted by both domestic and international visitors, it must have a good balance in the food, souvenirs and merchandise it offers. The golf course will be designed and built to attract the maximum variety of golfers and tournament organizers. The same can be said for the marina. Communication between the resort planners and the Taiwan Yacht Manufacturers Association should begin immediately and continue with the idea of getting their support.

Sister city relationships should be established with US cities that can best match the resort areas assets and greatest needs. Daytona Beach Florida and Los Angeles California are 2 potentially good cities. Choices should include those US cities that are active and successful in motorsports, boating, and leisure time activities similar to what DaPeng Bay has in mind. It is vital for the resort to create an attractive English and Japanese web site as well as to compile data that will be used to attract investors by showing the potential for RIO in this project.

Sanctioning bodies for various types of motorsports

FORMULA CAR RACING

- [IRL](#)(Indy Racing League) - IRL, [Indy Lights](#)
- [IMSA](#) (International Motor Sports Association) - [FBMW Series](#), [Star Mazda Series](#), [Atlantic Championship Series](#)
- [SCCA](#) (Sports Car Club of America) - US
- [Formula Pro Racing](#)
- [FRCCA](#) (Formula Car Club of America)

STOCK CAR RACING

- [NASCAR](#) (National Association for Stock Car Auto Racing) - Cup Series, Nationwide Series, Truck Series
- [ARCA](#) (Automobile Racing Club of America)
- [ACT](#) (American-Canadian Tour)
- [ASA](#) (American Speed Association)

- [FASCAR](#)
- [Mid-American Stock Car Series](#)
- [MMRA](#) (Miniature Motorsports Racing Association)
- [USAR](#) (United Speed Alliance Racing)

ROAD/SPORTSCAR RACING

- [IMSA](#) (International Motor Sports Association) - [ALMS](#), [GT3 Challenge](#), [IMSA Lites](#)
- [Grand Am](#) - Rolex Sports Car series, Koni Challenge Series
- [SCCA](#) (Sports Car Club of America)
- [NASA](#) (National Auto Sport Association)
- [USERA](#) (United States Endurance Racing Association)
- [ASA](#) (American Speed Association)
- [BMW Car Club of America](#)
- [CASCA-OR](#) (Canadian Automobile Sport Clubs - Ontario)
- [MCSSC](#) (Midwestern Council of Sports Car Clubs)
- [PCA](#) (Porsche Club of America)
- [Porsche Owners Club](#)

DRAG RACING

- [NHRA](#) (National Hot Rod Association)
- [IHRA](#) (International Hot Rod Association)
- [ADRL](#) (American Drag Racing League)
- [AHRA](#) (American Hot Rod Association)
- [AHDRA](#) (All Harley Drag Racing Association)
- [ANDRA](#) (Australian National Drag Racing Association)
- [FHRA](#) (Finnish Hot Rod Association)
- [NZDRA](#) (New Zealand Drag Racing Association)
- [CIFCA](#) (California Independent Funny Car Association)
- [MSCS](#) (Midwest Super Comp Series)
- [NMCA](#) (National Muscle Car Association)
- [PMRA](#) (Pro Modified Racing Association)
- [IFRA](#) (International Fuel Racing Association)
- [DRAW](#) (Drag Racing Association of Woman)
- [JDRL](#) (NHRA Jr. Drag Racing League)

DRIFTING & RALLY

- [FIA](#) - Sanctioning Body for WRC (World Rally Championship)
- [NASA Rally Sport](#) - US Sanctioning Body
- [Rally America](#) - US Sanctioning Body
- [USRC](#) (United States Rally Championship) - US Sanctioning Body
- [IRC](#) (Intercontinental Rally Challenge)

SPRINT CAR & MIDGET RACING

- [WoO](#) (World of Outlaws)
- [USAC](#) (United States Auto Club)
- [ASCS](#) (American Sprint Car Series)
- [ARDC](#) (American Racing Drivers Club, Inc.)
- [ASA](#) (American Speed Association)
- [Auto Value Bumper to Bumper Supersprints](#)
- [BMARA](#) (Badger Midget Auto Racing Association)
- [BCRA](#) (Bay Cities Racing Association)

- [CFSS](#) (Checkered Flag Sprint Series)
- [Colorado 1200 Outlaws](#)
- [HOSS](#) (Hoosier Outlaw Sprint Series)
- [NCRA](#) (National Championship Racing Association)
- [NCMA](#) (Northern California Modified Association)
- [NEMA](#) (North Eastern Midget Association)
- [Race Saver Sprint Series](#)
- [Sprint Bandits](#)
- [SCRA 360's](#) (Sprint Car Racing Association 360's)
- [Virginia Sprint Series](#)
- [Wilroc Sprint Car & Supermodified Racing](#)

MOTORCYCLE RACING

- [AHDRA](#) (All Harley Drag Racing Association)
- [AMA](#) (American Motorcyclists Association) - US Governing Body
- [FIM](#) (Federation Internationale de Motorcyclismo) - World Governing Body
- [FHRA](#) (Finnish Hot Rod Association)
- [MA](#) (motorcycle Australia) - Australian Governing Body
- [ACU](#) (Auto Cycle Union) UK Governing Body
- [MSA](#) (Motorsport South Africa) - South Africa Governing Body
- [FFM](#) (Federation Francaise de Moto) - France Governing Body
- [MCUI](#) Southern Centre - Governing Body of Republic of Ireland
- [ASRA](#) (American Sportsbike Racing Association) US Sportsman Level Governing body
- [PMRA](#) (Premier Motorcycle Drag Racing Association)
- [CCS](#) (Championship Cup Series)
- [MDRA](#)(Motorcycle Drag Racing Association)
- [MIROCK](#) Superbike Series

KART RACING

- [WKA](#) (World Karting Association)
- [IKF](#) (International Karting Federation)
- [SKUSA](#) (SuperKart USA) - Karting Series in U.S.
- [GLPro Series](#) (Great Lakes Pro Series) - Karting Series in U.S.
- [CIK-FIA](#) (Europe)
- [FIK](#) (Federazione Italiana Karting)
- [Stars of Karting](#) - Karting Series in U.S.
- [WSK Promotional SRL](#) (International)

AUTOCROSS RACING

- [SCCA](#) (Sports Car Club of America)

VINTAGE/ANTIQUÉ RACE CARS

- [Atlantic Coast Old Timers Auto Racing Club](#)
- [HSR](#) (Historic Sportcar Racing)

3. 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. It is also a city filled with streets that are too narrow, and an infrastructure that was never intended for the growth that has occurred. As a result, delays in traffic and confusion in getting around has been a source of frustration for both international visitors and Taiwan residents. Challenges in securing central government funding for new development projects has been hampered by a number of factors including both the responses needed to address natural disasters like Typhoon Morokot, to priority issues being earmarked in other cities because of perceived political or socio-economic considerations. For whatever reason, Tainan has found itself in need and has actively explored remedies. There are two areas in particular that will be discussed in detail here. The first is the AnPing Road area and the second is the HaiAn Road area.

AnPing road is easily one of the most popular destinations for tourists and a great deal of time and resources have been invested in this district of the city. The results are mostly quite pleasant with nice open areas for walking around and a lot of spots for food, snacks, & local specialties. This area is designated as a "Green Area."

HaiAn Road is a really artsy area that is somewhat reminiscent of Greenwich Village in lower Manhattan. Lots of art; lots of good food; lots of local flavors and culture, but the traffic could ruin anyone's idea of fun. So the idea was to create a sizable parking area underneath the street, limit the vehicles above ground to deliveries only, and make the entire area quiet and friendly for pedestrians and bicycles; in short, a green tourist zone. Sounds like a great plan, but after 15 years, the parking area is finally nearing completion, much to the ongoing complaints of the residents. In fact, this innovative solution for making it easier for those visitors who come by car or motorcycles should be replicated elsewhere around the island. Especially for a foreigner, this is a great solution to the problem of parking.

Tainan has two great museums in its future as well. The ChiMei museum should be completed in about two years and there is another art museum in the planning stage.

Tainan's greatest asset is its rich historic and cultural venues which attract many visitors year-round. There is also an excellent variety of restaurants, local specialties and entertainment. Tainan's greatest liability is its lack of efficient access from the road. Although the new #84 and the #1 and #3 freeways go through Tainan, local traffic can be slow and quite congested. There has been a

concerted effort to resolve traffic issues, but more work is needed and central government funding is essential. With better access, Tainan can really grow economically. With companies like Corning, ChiMei, and many more, a very good foundation is in place for robust growth.

2011 Tainan Development Policy

I - To build cultural capital for leading Taiwan

- Plans to build art museums belonging to the Tainan people.
- Establish a television support center to help foster growth of media production in the city.
- Restore and repair monuments and historical buildings (Wu Yuan, Association of Patriotic Women of the Church Hall, Governor's Mansion, Museum of Seamounts, the Forest Department Store, and Original Waterways Clean Water District in Tainan)
- Support subsidies to the arts to promote the combination of arts education and school resources at all levels, fostering artistic talents and creativity from a young age
- Culture exhibition and exposure via arts activity centers in various districts for the public to expand the arts culture. Hold static and dynamic shows and cultural activities – 74 events are already on the planning calendar with grants of up to NT\$20,000 per event, multi-level support of the arts with a total funding of NT\$1.53 million involving some 16,000 people.
- Develop cultural and creative goods by actively promoting local industries, raising awareness within the design industry and creating industrial success
- On March 26th 2011, Tainan officially inaugurated the Cultural Asset Management Service declaring that Tainan City, with its wealth of both tangible and intangible cultural assets, would enter into the new era of professional management and maintenance, promotion of cultural asset preservation, and building cultural capital commitment.

- Development of local literature studies, preservation and exhibition:
 - (A) Tainan's first literary award ceremony, recognizing 30 individuals, was held at the North Gate on December 17th, 2011.
 - (B) To commemorate Tainan literary master Ye Shitao, the aboriginal forest in Tainan City was chosen as the future home of the "Ye Shitao Literature Museum."

- Promotion of the development of cultural and creative industries-related businesses:
 - (A) Tainan City Council proposed branding the city as: "Old Tainan, Cutting-Edge Style" to promote fashion and design development programs. With government funding of NT\$8 million, the goal is to brand Tainan as a center where ancient culture blends seamlessly with cutting edge design, thus creating a complementary industry.
 - (B) Organized "2011 Tainan Monument Art Bazaar" with the idea of establishing a vibrant outdoor environment to promote artistic, cultural and local specialties with an intimate ambiance.
 - (C) Through a series of interviews, videos and recordings, create a lively media campaign to promote the cultural history and atmosphere of Tainan. This would also serve as a modern database which could be easily accessed, thus having the potential to provide a positive influence on cultural, historical, and industrial developments. Interviews with Mr. Liu Asu, was completed in February 2012 and interviews with Ms. Wang Xiulian from the first generation of women architects, is scheduled for October 2012 completion.

II - Accelerate investment and job creation to build economic prosperity in Tainan

- Construction of a high quality investment environment
 - (A) " Liu Ying Science and Technology Industrial Park" plan:

First phase includes the sale of about 81.57 hectares, with the potential land area development of about 97.32%. Phase I would create up to

NT\$4.96 billion in investments, NT\$6.96 billion in annual production value and 750 jobs. Phase II would involve the sale of about 65.45 hectares, with the potential land area development of about 94.51%. Phase II would create up to NT\$15.78 billion in investments, NT\$28.62 billion in annual production value and 2,333 new jobs.

(B) "South Branch and Industry Support for LCD TV Industrial Zone" (Tree Valley Park) plan:

More than 105.24 hectares of land have been sold (68.6% of available land allocated for this plan), creating NT\$20.43 billion in investments, NT\$13.76 billion in annual production value and 4,050 jobs.

(C) "Yong Kang Science and Technology Industrial Zone," plan:

As of December of 2011, 115 vendors have been approved and 76.31 hectares sold (about 94.98% of total available land), creating NT\$ 37.46 billion in investments, NT\$23.69 billion in annual output value and 7,758 jobs.

(D) "Chi Gu Technology Industrial Zone" plan:

Environmental impact assessment has been approved by the Environmental Protection Department and is on record; however additional reports seem incomplete at this time.

(E) "Southern Textile Exhibition Center" plan:

Both the Tainan Textile Company and The Commercial Times newspaper had a signing ceremony on June 22nd of 2011. The Commercial Times estimated investment within 5.5 years would total up to NT\$77 million (\$25 million in renovations and \$52 million in operating costs). 12 exhibitions are to be executed in the first full year, increasing annually to 25 exhibitions during the 5th year. The first exhibition at the Southern Textile Exhibition Center was in November of 2011.

(F) "Tainan Old Industrial Areas Renovation" plan:

A total of NT\$36,427,500 will be spent renovating some of Tainan's oldest industrial areas. Jia-li industrial zone would receive NT\$16.5 million in funding for improvements; the Bao-an industrial zone will see NT\$11.49 million; Xin-shi industrial park will get just over NT\$2.9 million; and the An-ding industrial area will see NT\$5.5 million, with smaller amounts going into the renovation of other sites. Currently, this plan is underway.

□ Creating a wave of investment in Tainan:

(A) Investment results after merger and upgrade of Tainan City and County:

225 new businesses, NT\$105.67 billion in new investment, NT\$94.764 billion in new annual output value and more than 20,000 new jobs.

(B) Major investments:

Conference and Exhibition Center, Crowne Plaza Tainan, the Eminent Luggage Company and 30 other major plans.

□ Upgrading and promoting the development of new industries, counseling:

New city science and technology plan:

1. Biotech Industry – the November 2011 “Tainan Green Energy and Biotech Industry Expo” at the Southern Textile Exhibition Centre had about 400 exhibitors, while handling a series of activities such as biotech and green energy industry forums, product technology presentations, industry survey results and employment services.
2. Green energy investment – as of December 2011, eight local manufacturers have entered into this project (億芳能源、台灣超導節能、奇力光電、昱邦光電、綠罇電能、聯合能源、達能科技、新世紀光電) with a total of NT\$10.6 billion in investments, and an expected annual production value of NT\$10 billion.

3. Development of electric vehicle industry – Tainan submitted a proposal to the central government in June of 2011 for a "smart electric vehicle pilot program"

4. Fashion - "2011 Tainan Image Fashion Design Competition" was held on November 5th at AnPing Castle.

“Traditional Market Renovation and Improvement” plan:

(A) Improve the traditional retail markets with funding of about NT\$58 million.

(B) Promotions for 5 traditional markets using NT\$1.2 million in funding produced NT\$5.15 million in increased sales and overall revenues up to just over NT\$19 million.

Establishment of SME credit guarantee fireflies project.

Low-carbon economy:

Set up "Sun City Project Office" for dealing with solar photovoltaic technology issues. In November of 2011, authorized 2 solar projects (17 houses generating 134kWp and 8 houses generating 24.38kWp electricity from solar), under the "100 Annual Grant Sun Community PV System Implementation Plan".

III - Construct tourism based on international expectations

Integration of tourist resources to strengthen the city's tourism marketing:

Government resources will be used to strengthen tourism promotion and promoting existing cultural monuments, folk festivals and specialty snacks. Improve tourist information services to create a friendly environment for tourists and to promote the beauty of Tainan City. The goal is to enhance sightseeing and increase the economic benefits of tourism development.

Hold city-wide cultural events and festivals by incorporating agricultural products over the four seasons, educating the public through an array of perspectives, and giving insights into the historical culture, industries and humanities of the city.

- Hold more medical tours, golf tours, sightseeing cruises and other emerging tourism plans. Use existing areas of the AnPing district to develop peripheral regions including AnPing Harbor. Incorporate available water transportation and closure of the old AnPing district and waterfront districts to develop the National AnPing Harbor Historical Park.
- Tainan Airport: promoting direct cross-strait flights and international charters to both Japan and China.

IV - Agriculture

- The 2011 Taiwan International Orchid show created export orders up to NT\$7 billion, clearly demonstrating its agricultural prowess.
- The amount of Aiwon mangos exported to Japan amounted to approximately 1,665 metric tons, breaking the previous year's record of 1,160 tons.
- Green Gold program for promoting health and safety in agriculture:
 - Counseling organic farmers to verify organic cultivation areas; Tainan's certified organic agriculture in 2011 totaled 129 farms with a total area of 215.71 hectares [19 rice (11.53 hectares); 76 vegetables (143.43 hectares); 26 fruits (44.74 hectares); and 8 farms growing other crops (16.01 hectares)].
 - Establishing a substantial organic agricultural area: On July 14th, Taiwan Sugar Corporation signed an agreement to rent land totaling 156,801 square meters of land to organic farming.
- New Farmer's School of Tainan City is using fallow agricultural land to give young people incentives to revive agriculture.
- Build export pipelines through agricultural exhibitions and promotional activities at home and abroad to increase income for low wage farmers.

V - Promote a green and sustainable low-carbon building industry

- On August 4th, 2011 the Environmental Protection Agency of the Executive Yuan announced that Tainan has been selected as the only low-carbon model city in Southern Taiwan. "Universal low carbon lifestyle," "efficient low carbon transport," "low carbon sightseeing," "multiple green energy solutions," "low carbon energy saving building materials and construction methods," "recycling society," "low carbon campus environment" and "ecological city function" are eight major characteristics that together, create a standard of environmental excellence for a model low-carbon community.

VI - Ensure secure, convenient, and peaceful travel around Tainan

- Open up urban roads:

Completion of a project that opened eight roads relieving congestion and improving access was completed at the end of 2011.

- NT\$2.75 billion was secured from the central government for specific road construction projects. 11 road projects have now been completed, with a total length of 12.3km, at a cost of slightly more than NT\$3 billion.

- Communication channels to produce and improve project:

(A) Two additional freeway exit projects to begin in June and November of 2012 to be completed in December of 2014

(B) Improve Rende interchange in a 3-step project

- Proposed project to build five new connecting roads to the Science Park.
- Project of moving 8.23 km of existing railway underground is estimated to be completed in 2017.
- Proposed construction of six new roads in the downtown area to improve access and congestion costing NT\$58.6 million and totaling 1.85 km.

Additional road projects:

(A) Tied in with the City Road Project (Provincial Road), a total of five roads are being improved – widened and smoothed, at a funding of NT\$370 million, expected to be completed in 2013.

(B) To provide a SOP for roadwork:

1. Newly built or expanded roads may not be excavated for three years after work has been completed.

2. Road renovation, repair and minor improvements may not be excavated for one year after work has been completed.

3. Roads cannot be opened to traffic until paving materials have been allowed to properly set for six hours.

Establishing a video public monitoring system for the purpose of enhancing public safety and security, which meets or exceeds the minimum requirements of law and order, taking into account human rights.

Improvements in traffic safety including adding road markings, blind-spot mirrors, pavement markers and signage.

VII - Water management and disaster prevention, maintenance of public security, protection of life and property safety

36 separate flood control projects have been completed; Ten additional projects are still under construction.

Small and medium-sized drainage improvement projects, river projects and wastewater/sewage facilities are underway to enhance the quality of water and minimize damage caused by flooding.

Research & development of Tainan City disaster prevention and rescue plan.

Future development strategy

To successfully promote the Sun City Project, the Tainan City Government economic development agency has planned a number of promotion methods as below:

- Set up a project office

The establishment of "Sun City Promotion Office" to provide advisory services and community advocacy through its professional team so that people can share Solar Solutions and gain a better understanding of the benefits and uses of solar technologies.

- Set up a dedicated Web site

"City of Tainan Information Network" will set up solar photovoltaic information providing regulatory information and a professional media platform related to building solar powered systems.

- Coordinate green energy banking and financing

Coordination of Cathay United Bank and "city banks" aimed at "people" and "enterprises" looking to establish solar photovoltaic projects that need financing. An exclusive homepage contact window open to the public has resulted in Cathay United Bank providing financing for up to 80% of the total value and with repayment periods up to 15 years for "Roof-top Solar" projects for private home owners and housing.

- Foster education advocacy

Hold more community advocacy presentations, interview activities, and participation in intelligent green city exhibitions. Issue press releases for event marketing and create promotion materials for general use.

- Promotion of a public premises leasing mechanism

Promoting and establishing a leasing mechanism specifically suited for public premises and commercial tenants to accommodate up to 8mw photovoltaic roof-top systems.

Electric car industry

- Foster the development of an electric car industry.
- Assist in developing manufacturing of vehicles;
- Assist in developing conversion and retrofit kits;
- Assist in upgrades in technical applications for recharge stations and batteries;
- Assist in the development and promotion of electric vehicles for export as well as for domestic use.

- Provide demonstrations and of smart electric vehicles to help stimulate industrial restructuring, technology improvements, supply chain integration, conversion of components (such as LED lighting) to make vehicle more energy efficient, and development in vehicle electronics and modules that reduce energy consumption.

Green Energy Industry

1. PV and LED development

Investment in green energy industry as the global trendsetter with overall environmental advantages of Tainan City in the production base of PV cells and support companies within the current area communities.

2. Development goals

Through the help of the fabricated metal products industry (1,310 companies), machinery and equipment industry (876 companies) and motor vehicle and parts dealers (432 businesses), deep green energy industries will stimulate development in core services, with the goal of making Tainan an International Center for eco-tourism and investment in green energy.

- Bio-Tech Industry

Promoting economic and trade developments starts with agricultural industries, management of biological science and technology, primary food deep-processing industries and aquacultures. In agricultural and the primary industry area, stability in raw material sources, environmental monitoring and raw materials test analysis are essential. With a strong foundation in bio-technology research and development, excellent agricultural assets, professional talent, and tech-funding incubation, Tainan will become a leading Asia-Pacific health, technical development and manufacturing city that features medical and eco-tourism, sightseeing for medical, and bio-tech clusters, organic farms and a strong bio-technology industry marketing counsel in segmented markets, improving business environment and international real estate organization.

- Fashion and Design

With a strong cultural attraction as its foundation, fashion and design will promote the city as an international tourist and leisure hub.

- Tainan is a stronghold area for shoemaking and the textile industry: 480 total manufacturers, 325 textiles, 148 garments and home furnishings, 7 man-made fiber industries.
- Tainan has the highest design department density in Taiwan.

Performance Numbers

(A) 2011 Tainan overall quantitative performance indicators

Performance Indicator	At the end of year data	Rate of growth / %	Tainan's Ranking among the five municipalities
Number of Companies registered	29,710	795 / 2.75%	1
Amount of the registered capital of the company	NT\$775.9 billion	NT\$31.4 billion / 4.22%	3
Number of Businesses registered	56,107	922/1.67%	2
Business capital	NT\$10.2 billion	NT\$0.46 billion / 4.69%	2
Number of workers insured	713,954	28,350 / 4.14%	2

Number of workers insured from November 2010 to November 2011 data.

Data source: Business Department of the Ministry of the Economy,
Insurance Council of Labor Affairs of the Executive Yuan

(B) 2011 Tainan City Government industrial zone investment results

In 2011, 225 new investments by the government totaled NT\$108.1 billion creating an estimated annual production value of NT\$91.16 billion and 20,704 new jobs.

1. Yongkang, 45 new investments in industrial area of science and technology totaling investment of NT\$36.25 billion, estimated annual production value of NT\$22.06 billion and 7,382 new jobs created.

2. Ying Liu, 44 new science and technology industrial zone investments totaling NT\$23.96 billion, estimated annual production value of NT\$32.12 billion and 3,008 new jobs created.

3. Tree Valley Park added five new investments totaling NT\$20.43 billion, estimated annual production value of NT\$13.76 billion and 4,050 new jobs created.

(C) Tainan City- Important investments in the future business plan

To promote industry development, the City Council will promote the "industry has a home, home has an industry" policy with a future towards "green energy," "bio technology," and "cultural creativity."

1. High Speed Rail Conference and Exhibition Center

Tainan City and Taiwan High Speed Rail will cooperate to develop the Tainan High Speed Rail Station area into a Convention and Exhibition Center. This project is expected to accommodate the development and management 600 booths and will provide related ancillary commercial facilities, introduce potential manufacturers in media and will expect investment of approximately NT\$1,800 million.

2. State-owned land to develop

Tainan City Council and Ministry of State-owned Property will handle state-owned land development cooperation in the Tainan City commercial area, building a rich and commercially integrated park conditioned for major investment with an estimated annual output of about NT\$160 million and 1000 new jobs.

Planning is ongoing with concepts to converge Tainan culture, technology, green energy, services, hotels, restaurants, and boutique department stores from different industry alliances to create a more diversified business model that maintains common themes and expands commercial and cultural activities. This includes upgrading land use effectiveness to achieve multiple benefits.

VIII Future Prospects

Tainan City Government's Sun City Project depends on a common promotion and implementation of programs tied to the central government's "million roof" policy. This policy is an expanded photoelectric application for domestic needs led by solar PV module manufacturers, commercial system and power plant investments, and building a related services center in Tainan. Green energy

development combined with official government cooperation will produce a regional industry service force and international global marketing force under the "Tainan Forever" policy. The ultimate goal is to create a world-class green city in Tainan.

Tainan tourism development vision

Cultural monuments, local products and ecological resources combine to boost tourism development opportunities. The current plan and future policy goals are as follows:

1. Development of cultural tourism routes to create employment opportunities.
2. Tainan literary map: Tainan is a living museum. As Taiwan literature depicted in the works of master Ye Shitao, "Tainan is a good place where people are inspired to dream, love, get married and get along well." By walking through literary "maps," tracing the old routes, eating the local specialties, visitors will be able to find an entirely different atmosphere. This city will enhance the cultural budget and promote the development of culture and tourism industries.

Night Markets

Tainan has a number of night markets that attract quite a few visitors. However, these are located nearby newly built, high-end housing. The congestion and parking problems have been causing problems for the city. The markets are very popular and bring in large numbers of people. However, real estate values in these areas are declining due to the markets' popularity. This is a difficult problem to resolve. Can these markets be relocated to more suitable sites that will still be easily accessible?

CONCLUSION

This third edition of the AmCham Kaohsiung White Paper has been expanded to include Kaohsiung, Tainan and Pingtung. One theme runs throughout the previous pages; Southern Taiwan is rapidly developing into a cleaner, more environment-friendly place where new business opportunities and job creation are at the forefront of all local governments. Taiwan's central government has made great efforts in providing funding for numerous development projects. With the European Debt Crisis and the sluggish U.S. economy, coupled with growth in China's manufacturing and new competition from Mexico and Brazil, great challenges are ahead for Taiwan. However, the ever strong entrepreneurial spirit of the Taiwan people is perhaps their greatest asset.

In discussions with the various Southern Taiwan local government officials, it became quite clear that all are looking to attract foreign investment, with a desire to see much of it coming from the U.S. In almost all the projects and plans mentioned in these pages, opportunities abound for U.S. business involvement. Taiwan's long standing commitment towards working with the U.S. 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 that was not discussed in the previous pages was the growing potential for Taiwan companies to act as liaisons or middlemen for U.S.-China business opportunities. Taiwan offers an interesting advantage for those companies looking to do business in China, but don't because of the fears of IP rights violations or the lack of understanding of the laws and culture in China. Taiwan has a long history with the U.S. and many business relationships have been established and well-maintained throughout the years. This does represent potential opportunities on all sides. 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.

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American Chamber of Commerce Kaohsiung Taiwan
高雄美國商會

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SOUTHERN TAIWAN WHITE PAPER



南台灣 白皮書

台南 · 高雄 · 屏東

March 22nd, 2012



ABOUT

About American Chamber of Commerce Kaohsiung Taiwan :

The American Chamber of Commerce in Kaohsiung (AmCham Kaohsiung) serves as a forum and representative body for U.S. and Taiwanese firms. It helps American companies integrate into the Southern Taiwan business community and allows firms in Taiwan to build better ties and associations with American firms. AmCham Kaohsiung assists American companies wishing to invest or trade in Taiwan. To achieve this, AmCham Kaohsiung works with the American Institute in Taiwan Kaohsiung Branch as well as the US Foreign Commercial Service in Taiwan, the American Chamber of Commerce in Taipei and the US Chamber of Commerce in Washington.

高雄美國商會簡介：

高雄美國商會為台灣及美國企業之間的溝通平台以及代表，使美國企業能更融入南台灣的企業環境，藉此幫助台美兩方企業建立更深厚的合作關係。為了幫助願意在台投資的美國企業，高雄美商也積極與下列組織合作：美國在臺協會高雄分處、美國海外商務服務處、台北美國商會以及華盛頓美國商會。

致謝

2012 年，高雄美國商會很榮幸發表第三本年度白皮書。在製作這本白皮書的過程中我們受到各界大力的支持與回應，特此致謝。高雄市長辦公室及觀光局官員、行政院南部聯合服務中心、台南市長賴清德市府團隊、屏東縣副縣長鍾佳濱等，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。在此，我們對所有參與的官員由衷表達感謝之意。他們的盡心盡力提供我們了解政府對一些議題的完整觀點。高雄美國商會在此也要感謝內政部入出國及移民署高雄市第一專勤隊的李鳳珠女士提供本白皮書可使用的統計數據，以及在高雄議題上給予的協助。在製作這本白皮書的過程中，許多產業界領袖也給予我們大力的協助、意見與支援。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）由衷表達感謝之意，AIT 總是不吝對我們提供各種協助與支援。最後，我們要謝謝台北美國商會的同事提供寶貴的協助，他們 60 年來的卓越成就使我們獲益良多。謝謝挪出寶貴時間參與且分享意見、知識與經驗的所有人士，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。有鑑於近來對歐債危機、「兩岸經濟合作架構協議」（ECFA）實施後的衝擊與南部縣市合併等議題的討論，這本白皮書的發表更具重大意義，它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、合作與致力於創造美好的未來。謝謝。

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序論

2011 年對南台灣而言是非常正面的一年。ECFA 實施後開始展現改善的成果，縣市合併後已開始落實整合，有許多發展計畫也正在進行。

基石已經奠定了，從現在開始展望未來，隨著全球經濟情勢緊張，我們應審視未來發展將如何影響南台灣。

2011 年末、2012 年初，有了許多重大進展影響台灣和全球的貿易及關係，觀光產業儘管相對來說仍處於萌芽期，卻已展現能成為未來經濟重要收入來源的潛力。

機場、海港、遊艇專區等正努力走向現代化與國際化，創造更友善更迎合全球的環境。海運、觀光、招商以及一系列發展計畫正匯聚在一起，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、企業領袖與員工重新進駐與生活的地方，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。

南台灣若要成為真正精彩的地區，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。為此，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。

這些改善與發展計畫的推行，為台灣企業家、美商公司和國際企業帶來巨大商機，這樣的契機不容忽視與低估。

Brian Aiello



President – AmCham Kaohsiung.

第三本南台灣白皮書由高雄美國商會（AmCham-Kaohsiung）編製發表，內容涵蓋對南台灣商業環境的整體評估，檢視商會視為重要的 2011 年議題，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了解、資訊與倡導。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

主要建議

2012 年對南台灣而言必定是充滿新契機與挑戰的一年。ECFA 完成簽署、總統立委合併選舉結束以及縣市改制合併後，各方仍有許多工作尚待完成。歐債危機將使經濟情勢更趨複雜多變。

- 擴建經濟開發區及設立自由貿易區，是當前南高屏最迫切的需求。對於可能進駐南台灣的企業，須加以考量他們的需求。為活絡地方商業經濟，我們必須強行銷將城市塑造為最適合做生意的地方。為了能真正吸引到國外投資與外商，必須了解他們的需求及我們的競爭優勢。潛在投資人和企業想要知道：「你們城市可以提供我什麼，幫助我進駐投資，讓生意成長、投資看見回報？」
- 三縣市均提到中央與地方之間需加強溝通協調。南部要看見實質成長，中央政府須扮演主

要角色，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與地方之間的關係，但唯有攜手合作才能有益於更多民眾，政治氣氛也是如此。

- 積極尋找和姊妹市合作的新方法，以促進雙方現有的關係，並汲取姊妹市的經驗教訓，向他們學習如何推動環保、提升競爭力、改善治安和促進觀光。
- 對於需要大量民間資本的開發案，政府應考慮開出更吸引人的條件，尤其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。
- 應考慮聘請專業知名的都市規劃師來看一看潛在開發區域，針對哪種規劃策略藍圖最能滿足南部縣市未來經濟發展及城市需求，提供他們的見解。本

地規劃人員很難開創令人眼光一亮的全新視野，這不是批評；生活現實就是如此。如果縣市發展目標是朝向更能吸引外資、更國際化的大都會，或許外人的角度對未來規劃更為寶貴。都市規劃須綜觀大局，縣市境內各個區域的發展必須能相輔相成。以台中為例來說明，台中的金融、商業、行政中心或許可做為應如何協調整合發展的最佳範例。台中港路及文心路一帶，兩旁建築物無論從規模、外觀氣勢、建築風格及生活空間來看，均可和世界上任何一個大都會匹敵。看過這個區域的外國人離開時的感受是「我可以在這裡生活、做生意。」

- 吸引新的投資及外商進駐南台灣關鍵在於適當行銷。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）、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可以吸引觀光客、外商公司、外商員工及家屬？
- 新加坡、馬來西亞、泰國、印尼、菲律賓等國家都在積極招攬外商投資及吸引國際遊客。星國或許是亞洲最成功的例子。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。
- 南部正尋求在太陽能產業上大幅增加能見度。歐洲國家因經濟因素削減對太陽能產業的補助，這點對台灣很有利。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。中央政府最近的談話似乎顯示了有意推動太陽能商用及家用系統更為普及。綠能

是成長中的產業，可以刺激經濟、創造就業機會且提升台灣形象。

- 確保在所有開發案中做好交通運輸及周邊協力產業的規劃。
- 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，規劃美國企業商務考察團參訪南台灣，討論投資機會。目前提案推動的乾淨、高科技產業及科學園區應做好完善規劃，以吸引潛在投資者。
- 配合政策計畫、低成本融資和補助金等措施，幫助傳統石化業進行現代化更新，避免造成任何不必要的產業大規模出走，傷害地方經濟和就業；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。
- 持續大力促進商業發展。可以不費力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。

- 認真考慮在發展新太陽能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，對此應推動美商與台灣廠商建立夥伴關係。這些地區的地理氣候和人文因素很適合共同合作發展。
- 應探索其他的乾淨能源資源，例如風力、水力、地熱等，促使有更多電力供應來自於再生能源和對環境友善的能源，以因應目前和未來的電力需求。推動太陽能及風力發電系統的普及應用，取代傳統發電；應用範圍除了小規模家用及商用系統外，也應推廣至大規模商用及工業用系統。
- 建立關係以協助屏東在大鵬灣打造一座真正國際級的度假村。這項開發案對美商公司而言深具商機，地方政府高層很

歡迎美國人參與，因為他們深知這樣的夥伴關係可以帶來潛在雙向利益。度假村開發案包括賽車場、遊艇碼頭、親水公園、卡丁賽車場、輕型飛機場、高爾夫球場及海灘等設施。

摘要

親切南方 夢想遠大

面臨的困難挑戰

- 發展的同時需要認真解決交通往來、塞車和停車等問題。
- 即便有了 ECFA 簽署後所帶來任何益處，但面對歐債危機以及墨西哥、巴西、中國等競爭對手，將繼續突顯對台灣創造力與商業能力的看重與需求。
- 從傳統重工業製造基地轉變為更乾淨、更高科技的經濟型態，這將能促進實質的永續成長與經濟發展。重心應放在推動再生能源產業、引進國外投資、促進觀光，以及吸引企業重新進駐南台灣。
- 持續各種努力在維護傳統產業的同時，也提供資源協助升級，幫助它們轉型為更乾淨、更有效率的產業。

ECFA 與世界貿易組織 (WTO)

- 《兩岸經濟合作架構協議》(ECFA) 實施後又過了一年。南台灣應善加利用 ECFA 帶來的利益促進發展，並努力減少任何負面的衝擊。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。
- 台灣必須運用 ECFA 來鞏固商業基礎，同時保障智慧財產權，並持續促進亞洲更穩定的情勢。現在與世界各國簽訂新的貿易協定的大門已敞開，台灣必須積極爭取每一個可帶動成長的機會。
- 台灣製造業必須優先著力於推廣「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。想想「Made in Taiwan, Used Everywhere.」(台灣製造、全球通行)。

提供平衡

- 教育訓練是台灣南部未來成長不可或缺的條件，必須持續推展。教育訓練的內容應著眼於未來的需求，使學生畢業進入當地職場時，能具備最需要的技能。
- 再生能源和永續能源將會主導未來數十年的經濟發展。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。
- 工作機會的流失對促進經濟實質成長而言是挑戰也是機會，因為地方經濟正轉型為新興產業和乾淨產業。地方、中央政府和教育機構必須協力合作，提供失業民眾職業訓練課程；同時也應對教育體系訂出新方

向，以符合台灣未來發展的職場需求。

- 政府必須持續和商業界密切合作，解決商辦、廠辦大樓閒置的問題。
- 整合公共場所的英日文標誌和提升外語的公共服務，也是持續推升南台灣發展的重要條件，以期推動高品質的觀光、擴大吸引國外投資和促進成長。這方面過去已做了許多努力，但仍應繼續擴充、改善。
- 持續建置各種可以輕鬆取得投資訊息和資源的入口網站，確保這些資訊的提供可以達成兩個重要目標：彰顯南台灣是投資的最佳區域，以及說明國際企業進駐南台灣是立足亞洲的最佳方式。應突顯南部的生活品質、人力資源品質和產品品質等特點。

教育

- 持續建立「e 化學習系統模式」課程，確保師生能獲得適當的

設備與軟體訓練，以發揮數位化學習的最大成效。

- 持續拓展地方政府與教育人員對話的平台，確保教育機構能在縣市合併後獲得所需的資源，幫助學生做好職場準備，進入綠色技術、科學、工程、高科技、運動、休憩與觀光產業等領域。
- 持續拓展南部各縣市和其姐妹市的關係，促進雙方更廣泛的交流合作。
- 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。
- 持續推動以國際為導向的教育。台灣許多中小學和絕大多數的大學課程都使用美國的教科書，但研究證實採取多面向策略、使用不同國家的教材，能夠提供任何年級的學生具備

國際觀。這可以導向學生未來更好的機會與職場選擇。

修改法規為縣市合併後創造最佳的商業環境

- 改善法規環境必須一方面能吸引國外投資、對外商友善，並同時能有利於國內商業的長期成長。南台灣應借鏡其它城市之長，仿效他們成功吸引外商的地方政策和規範。
- 將租稅優惠與獎勵措施和土地取得法規的變更加以整合，確保外國人也有獲得國內專案融資的機會，以鼓勵新事業的設立與拓展。地方政策措施必須和其他成功吸引且留住國外新投資的城市相仿。
- 地方政府和中央政府的經濟部工業局應持續合作，確保對南部的未來成長做最好的服務。
- 開辦單一窗口的公司設立登記制度，以簡化程序吸引國外投資與新設公司。這套制度應力求便利可行，並且定期更新。

私校教育

- 南台灣仍有待努力對一般民眾宣導私立學校的需求與價值所在。若要成為真正國際化的城市，我們必須鼓勵、支持國際學校。許多在本地的國際學校需要地方政府持續的協助，包括土地、設施和取得校園整修或擴建的許可證等。私立學校必須展臂協助社區發展，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的教育。優質的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

提升地方教育

- 提供藝術學位的高等教育機構很適合南部的學生。持續協助這些學校升格為「國立大學」將有助於提供學校更多的經費資源，並且給予學生更多的就業機會。

民享

- 隨著各項發展計畫的興建完工以及持續推動觀光產業下，可以預期未來能源的需求將大幅增加，因此應及早評估、規劃、籌措資金和建置來因應這些能源需求。可以優先考慮的措施包括：應著力於發展乾淨能源與替代能源，更新現有發電設施，以及允許創新的節能和發電方法。
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

大方向

- 高雄、台南、屏東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

議題

1. 高雄

縣市合併後，高雄至今面臨的主要挑戰是如何將前高雄縣地區推升至城市標準層級。

ECFA 實施後對高雄的正面效益至今並未如預期的高，然最大的助益是在水果和漁產類。

縣市合併和 ECFA 的成果都需要一段時間發酵，必須持續關注各個層面以確保充分實現最大潛能。

新發展

統一集團將布局夢時代購物中心區域，加入稱為「21 世紀夢想城市 (DC21)」的國際投資開發案。

美商 AIRIS 公司有意願推動高雄航空貨運園區的投資計畫。

美國好萊塢視覺特效公司 Rhythm & Hues (R&H) 也將進駐高雄。

高雄在產業發展上目前有三大區域，目標是民間注資 45%、政府出資 55%。

2015 年中油高雄煉油廠即將遷廠，該區域也已可預見未來將有快速擴張的都會發展。儘管環境保護考量使得傳統經濟產業需要轉型，但很重要的是必須和這些已在高雄立足生根的製造業、傳統產業夥伴密切合作，協助他們進行必要的升級改善，以確保穩定度過轉型期朝向健全的未來發展。

高雄失業率較台灣其他城市略高出 0.5%，如何促進再就業是高雄的重要議題。失業及未充分就業主要可歸因於企業出走後，沒有新的工作機會可以替換。高雄向中央爭取經費補助來協助推動太陽能產業發展（屏東及台南也已表達類似的產業願景）。

薪資所得停滯不前是另一個憂慮，這導致財富差距日益擴大。最近的總統、立委合併選舉結果顯示投票率為 74%，從台灣的總統大選周期來看這其實是很低的。有一些人士認為低投票率和日益擴大的財富差距有關，並提出如果貧富差距繼續拉大，投票率將會下降。無論這兩者之間是否有關聯，很重要的是台灣經濟成長必須要靠所有產業並進。可幸的是，只要獲得適當的支援，台灣人民就可充分發揮創業精神。

高雄世貿展覽會議中心和遊艇製造專區預計將在 2013 年底完工啟用，可即時迎接 2014 年台灣國際遊艇展的舉辦。這將催生高雄的一個新產業，我們必須盡一切努力確保活動取得圓滿成功。

高雄需要深化姊妹市交流連繫，促進雙方關係成長。2011 年 5 月至 6 月到高雄五個美國姊妹市（西雅圖、波特蘭、聖安東尼、淘沙、邁阿密）拜訪期間，大家一致表達希望和高雄發展更熱絡的互動關係。可喜的是，陳菊市長最近親自訪問洛杉磯及邁阿密。未來應規劃更多的姊妹市訪問行程，尤其是到聖安東尼、西雅圖及波特蘭，這些城市極為看重和支持姊妹市計畫。在此特別提出，高雄和邁阿密可以商討共同合作，推動雙方的遊艇及數位內容產業。

高雄也積極尋求拓展捷運路網和輕軌建設，這是個好事。但這項計畫的招商成果並不順利。市府已表示將自行興建，但也坦承未來財源籌措將會困難重重。

在觀光產業方面，陸客來台到高雄旅遊人次增加了 43%，但他國遊客不增反減。台灣整體情況也很類似，陸客增長幅度因他國遊客減少而抵銷了。最令人擔憂的是中國觀光客在台消費總金額的問題。儘管陸客總人次達 365 萬是很漂亮的數字，卻也突顯許多問題仍有待解決。高鐵確實為觀光產業帶來不少助益，快速便利的交通往來對南部觀光甚為重要。生態旅遊、背包客、頂級遊客等也同樣重要。與其吸引只會殺價的廉價團客，到不如做出必要改變來爭取自由行陸客，進而吸引那些想要在台灣留下深刻旅遊體驗的遊客。

為協助帶動觀光產業而提出的基礎建設案，通常由地方和中央各出資一半，地方政府必須在每年 10 月向中央提出發展計畫申請書，中央編列補助經費則依計畫書項目的優先順序釋出。因此地方和中央應盡可能進行溝通協調。

現階段高雄應著力於遊艇製造專區及世貿展覽會議中心的如期完工，以及開闢高雄國際直飛航線。國際直飛航線已從 2010 年的 26 個城市增加到 2011 年的 50 個城市。

在此須提出，在注意枝微末節的同時，「顧全大方向」至關重要。在台灣各地旅遊時往往能發現一些有趣的事情，而高雄許多地區的發展似乎有些混亂、脫節。

根據市府官員表示，石油及其副產品仍舊是高雄重大污染的元凶。在和官員會面訪談中，高雄的三座火力發電廠和中鋼被舉出是最大污染源。對此，環保局已準備著手開罰。這些是高雄歷史最悠久的產業，因應措施的執行必須堅定，但合乎人情。

長久以來，高雄面臨企業將總部設於台北導致「南稅北收」不平衡的問題。關於這項政策議題我們不願有所評論，但如果能試圖創造更均衡的經濟情勢，將會促進全台灣持續成長。

中央政府去年宣布九大發展計畫，但至今並未有明顯進展。高雄市府有一些人表示資源分配困境可能會繼續惡化、不會有所改善，但在本白皮書付梓出版前並未收到資料可以支持或反駁這種說法。這九項計畫應視為對高雄經濟未來發展甚為重要，應置於優先地位。這些開發案有很多向國際招商的機會，應加強各種準備規劃作業，確保在適當時機可以將招標或投資訊息向外揭示，並統籌透過網路、外貿協會、經濟部、外交部等管道向國際社會宣傳的資源。

加工出口區

問題：

高雄境內加工出口區在製造能力上均出現廠辦商辦空間與勞力過剩的情況。換言之，可運用的潛在勞工和商辦均供過於求。

理論：

這種加工能力過剩的問題可從市府經濟發展局、加工出口區管理局、商辦仲介業者及投資者等各層面協調整合加以解決。

加工出口區問題之背景：

1. 加工出口區內有過多老舊廠辦，無法符合多數高科技產品製造廠的要求，而這些產業也正是市府欲招商吸引的對象。
2. 不同於本土製造業者，多數跨國企業不願投入大量資本用於購買或自建廠房；他們的策略是傾向於承租可「訂製建造」(build-to-suit) 的廠房。
3. 目前，在加工出口區內的跨國企業只能承租廠辦所有權人（通常也是該建物的主要使用人）釋出的剩餘空間。然而，大部分本國製造業者不樂於將其廠辦閒置的空間轉租開放讓其他廠商長期承租，因為若有其他長期承租戶在同一棟廠辦內，所有權人可能無法彈性運用閒置空間以適時擴增營運。
4. 廠辦承租受到牽制，因為加工出口區管理條例規定所有權人必須使用 50% 的面積。有許多例子顯示，所有權人並不會將其現有的 50% 建物空間出租作為製造用途。
5. 因此，高雄境內加工出口區的商辦廠辦買賣和出租市場非常沉寂，只有極少數的房屋仲介業者會專注於經營這塊市場。

建議：

1. 開放允許長期房產投資人可以在加工出口區內投資開發興建可供長期租賃用途的廠房。這種作法有兩項優勢：(1)加速老舊廠辦的再開發利用，以期更符合當前高科技製造公司的要求。(2)建造高品質的廠房（即 build-to-suit 訂製建造），並開放跨國企業可長期承租。
2. 地方政府的經濟發展局處單位可與房仲業者建立夥伴關係，向國際宣傳加工出口區的優勢。若市府單位得知國外廠商有興趣在加工出口區設置廠房，則房仲業者可以提供媒合，協助該國外廠商尋找願意在加工出口區興建、出租廠房的開發商或投資人。
3. 加工出口區管理局不應要求所有使用人開發興建高樓層廠辦（超過 3 樓）。事實上，通常低樓層廠辦（1-3 樓）就已足夠符合單一使用人的需求。加工出口區管理局不應強迫使用人開發興建廠房面積超過他們實際所需的廠辦大樓，這將大幅增加開發成本，甚至迫使潛在的使用人終止他們在加工出口區的建廠計畫。
4. 允許現有廠辦所有權人更多彈性的轉租條件。利用地方政府各經發單位和專業房仲業者的夥伴關係，提供媒合協助有意在台投資的跨國企業尋找適當的廠辦設施。這種夥伴關係可長可短，依照廠辦所有權人和國外廠商雙方需求而定。這種方式可以填補所有權人有剩餘廠房空間卻不知道如何利用、開發及行銷的缺口。

2. 屏東

中央政府已撥款分配地方辦理莫拉克風災重建等各項既定工程，但對後續重建工作並沒有提供新的補助款項。

也許當前屏東縣的首要重點發展為太陽能產業，尤其可因此抵銷核能發電的衝擊。

ECFA 實施後對屏東的農業發展並未帶來重大的變化，主要的考量在於從中國進口的食品必須符合品質、安全和健康標準。

屏東縣政府推出一項政策出租土地給小型農戶，以推動當地的農業發展。有一項實驗計畫將再開發利用台糖公司在屏東縣境內的土地。

利用類似於美國「和平工作團」(Peace Corps) 的非政府組織模式，也許能幫助彌補軍方日益縮小的人力資源，並提供可行的替代方案給年輕人一方面從事社區服務，另一方面也可同時賺取獎助學金學分就讀大專院校。這種模式也許能帶動以社區服務為基礎的產業形成，並為未來公職就業機會創造良好的環境，同時也有助於直接刺激經濟成長。利用這種非政府組織來資助的模式不僅可扶助各地成員和家屬，同時也可直接促進社區生活品質的改善。

對屏東而言，應繼續將其高等教育的發展重心從工科轉向藝術領域，這將對當地人文歷史文化創造更多的利益。

同時中央政府也應繼續推動屏東現有大專院校的整合，將這些學校升格為國立學校，促使他們獲得所需的補助經費。

製造業的重點發展應在於二次加工或組裝業，而非從原料生產製造的初級產業，這可促使產業發展對環境更友善。

屏東也應致力於改善交通運輸的基礎建設，包括鐵路、輕軌、高鐵和大眾捷運系統的擴建。國道 3 號和 88 快速道路已大幅提升屏東對外交通，但台灣的交通運輸正朝大眾捷運系統發展，也應考慮在屏東建置捷運，因為捷運可帶動地方經濟發展。規劃大眾捷運基礎設施時應配合經濟開發計畫，確保交通運輸可以跟上成長需求。交通便利是能成功吸引國外投資的重要因素之一。

將現行法規鬆綁，以促進民宿產業（B&B）的潛在發展。

屏東也應朝向發展生態旅遊產業，當地現有條件很適合生態旅遊。

大鵬灣已規劃一個國際級複合休閒度假村，該區域興建完工後將擁有一座競速賽車場（已接近完工）、卡丁車小型賽車場（go-kart）、輕型飛機場、親水公園、海灘、高爾夫球場、遊艇碼頭等設施。此外，古蹟建築物也獲得妥善的維護整建，可提供作為旅館房間休憩用途，以及博物館參觀等。據載中央政府將審慎考慮編列經費補助可行的經濟發展計畫。為符合要求，大鵬灣應採取各種必要措施。可喜的是，在大鵬灣區域似乎已有足夠的土地可滿足國際休閒度假村開發計畫。大鵬灣國際賽車場將可容納多達三萬名觀眾。無論這個預期人數有多大，我們必須指出國際級賽車活動一天能吸引超過五萬名觀眾。這意味著海陸空運輸都必須能因應屆時蜂擁而至的大批人潮，以及當地能增加住宿空間。度假村業主和管理階層必須思考，在開發度假區的各個層面能因時制宜，在允許成長擴建的同時又不會阻礙賽事活動的規劃與執行。為使大鵬灣地區能完全發揮潛力，必須要有知名品牌進駐，包括飯店、餐廳及其他和度假村主題相關的業者。國際連鎖集團像是 Hard Rock 和 Planet Hollywood 都是可吸引招商的對象。至於賽車場的建置，大鵬灣國際賽車場是符合 FIA Grade 2 等級的賽道。針對不同的賽車競技運動，大鵬灣應積極爭取相關國際賽車協會的認可及支持；這是頗具挑戰的目標，但能獲得越高層級的賽事認可，就越有機會獲得更多的贊助及活動舉行。此外，賽事認可層級也將影響周邊產業的數量與服務品質，包括餐廳、主題商品規劃

行銷等。換言之，比賽場地認可層級越高，就能吸引越多強而有力的贊助商和周邊業者加入國際度假村開發計畫。應特別注意安全訓練議題，不僅是緊急救難人員還有車手也應接受適當的安全訓練。可推出各種賽車競技訓練課程給業餘及專業車手，這種做法也可提升推廣道路安全。雖然目前大鵬灣當地設有醫療中心以及直升機飛機場，但還是必須強化人力資源配置及訓練以符合國際賽事的官方規定。此外，應協調該醫療中心配合鄰近有充足人員、完善設備的醫院，例如可以考慮直升機飛行僅需 10 分鐘即可抵達的義大醫院。商品開發銷售規劃（merchandising）應配合度假區的主題設計，以國際性為主又能帶點本土特色，以迎合廣大的遊客市場。餐廳飲食規劃也應如此。度假區若要能吸引來自國內外各地不同的遊客，就必須在提供餐飲、紀念品、主題商品等選擇上取得良好的平衡。高爾夫球場的設計建造，要能盡量吸引最多的球友和各種層級的選手以及國際賽事協會。遊艇碼頭的規劃也應如此。大鵬灣度假區籌備單位應立即和台灣遊艇工業公會展開溝通對話，持續尋求他們的支援協助。

屏東應和美國城市締結姊妹市關係，汲取國際經驗並為大鵬灣休閒度假區尋找最佳的諮詢對象。佛羅里達州德通海灘市（Daytona Beach）及加州洛杉磯是很好的選擇。在尋找可能的締盟對象時，應考量和大鵬灣欲發展的賽車競技、遊艇、休閒遊憩活動上已有成功經驗且很活躍的美國城市。很重要的是，大鵬灣休閒度假區應建構英日語網站，提供吸引人的網頁內容，並收集資料說明未來獲利潛力，以吸引投資者的目光。

各種賽車運動之國際認可機構

方程式賽車（FORMULA CAR RACING）

- [IRL](#)(Indy Racing League) - IRL, [Indy Lights](#)
- [IMSA](#) (International Motor Sports Association) - [FBMW Series](#), [Star Mazda Series](#), [Atlantic Championship Series](#)
- [SCCA](#) (Sports Car Club of America) - US
- [Formula Pro Racing](#)

- [FRCCA](#) (Formula Car Club of America)

美式賽車 (STOCK CAR RACING)

- [NASCAR](#) (National Association for Stock Car Auto Racing) - Cup Series, Nationwide Series, Truck Series
- [ARCA](#) (Automobile Racing Club of America)
- [ACT](#) (American-Canadian Tour)
- [ASA](#) (American Speed Association)
- [FASCAR](#)
- [Mid-American Stock Car Series](#)
- [MMRA](#) (Miniature Motorsports Racing Association)
- [USAR](#) (United Speed Alliance Racing)

道路式賽車 (ROAD/SPORTSCAR RACING)

- [IMSA](#) (International Motor Sports Association) - [ALMS](#), [GT3 Challenge](#), [IMSA Lites](#)
- [Grand Am](#) - Rolex Sports Car series, Koni Challenge Series
- [SCCA](#) (Sports Car Club of America)
- [NASA](#) (National Auto Sport Association)
- [USERA](#) (United States Endurance Racing Association)
- [ASA](#) (American Speed Association)
- [BMW Car Club of America](#)
- [CASCA-OR](#) (Canadian Automobile Sport Clubs - Ontario)
- [MCSSC](#) (Midwestern Council of Sports Car Clubs)
- [PCA](#) (Porsche Club of America)
- [Porsche Owners Club](#)

直線加速賽車 (DRAG RACING)

- [NHRA](#) (National Hot Rod Association)
- [IHRA](#) (International Hot Rod Association)
- [ADRL](#) (American Drag Racing League)
- [AHRA](#) (American Hot Rod Association)
- [AHDRA](#) (All Harley Drag Racing Association)
- [ANDRA](#) (Australian National Drag Racing Association)
- [FHRA](#) (Finnish Hot Rod Association)
- [NZDRA](#) (New Zealand Drag Racing Association)
- [CIFCA](#) (California Independent Funny Car Association)
- [MSCS](#) (Midwest Super Comp Series)
- [NMCA](#) (National Muscle Car Association)
- [PMRA](#) (Pro Modified Racing Association)
- [IFRA](#) (International Fuel Racing Association)
- [DRAW](#) (Drag Racing Association of Woman)
- [JDRL](#) (NHRA Jr. Drag Racing League)

漂浮拉力賽 (DRIFTING & RALLY)

- [FIA](#) - Sanctioning Body for WRC (World Rally Championship)
- [NASA Rally Sport](#) - US Sanctioning Body
- [Rally America](#) - US Sanctioning Body
- [USRC](#) (United States Rally Championship) - US Sanctioning Body
- [IRC](#) (Intercontinental Rally Challenge)

短跑道拉力賽 (SPRINT CAR & MIDGET RACING)

- [WoO](#) (World of Outlaws)
- [USAC](#) (United States Auto Club)
- [ASCS](#) (American Sprint Car Series)
- [ARDC](#) (American Racing Drivers Club, Inc.)
- [ASA](#) (American Speed Association)
- [Auto Value Bumper to Bumper Supersprints](#)
- [BMARA](#) (Badger Midget Auto Racing Association)
- [BCRA](#) (Bay Cities Racing Association)
- [CFSS](#) (Checkered Flag Sprint Series)
- [Colorado 1200 Outlaws](#)
- [HOSS](#) (Hoosier Outlaw Sprint Series)
- [NCRA](#) (National Championship Racing Association)
- [NCMA](#) (Northern California Modified Association)
- [NEMA](#) (North Eastern Midget Association)
- [Race Saver Sprint Series](#)
- [Sprint Bandits](#)
- [SCRA 360's](#) (Sprint Car Racing Association 360's)
- [Virginia Sprint Series](#)
- [Wilroc Sprint Car & Supermodified Racing](#)

摩托車賽車 (MOTORCYCLE RACING)

- [AHDRA](#) (All Harley Drag Racing Association)
- [AMA](#) (American Motorcyclists Association) - US Governing Body
- [FIM](#) (Federation Internationale de Motorcyclismo) - World Governing Body
- [FHRA](#) (Finnish Hot Rod Association)
- [MA](#) (motorcycle Australia) - Australian Governing Body
- [ACU](#) (Auto Cycle Union) UK Governing Body
- [MSA](#) (Motorsport South Africa) - South Africa Governing Body
- [FFM](#) (Federation Francaise de Moto) - France Governing Body
- [MCUI](#) Southern Centre - Governing Body of Republic of Ireland
- [ASRA](#) (American Sportsbike Racing Association) US Sportsman Level Governing body
- [PMRA](#) (Premier Motorcycle Drag Racing Association)
- [CCS](#) (Championship Cup Series)
- [MDRA](#) (Motorcycle Drag Racing Association)
- [MIROCK](#) Superbike Series

卡丁車賽車 (KART RACING)

- [WKA](#) (World Karting Association)
- [IKF](#) (International Karting Federation)
- [SKUSA](#) (SuperKart USA) - Karting Series in U.S.
- [GLPro Series](#) (Great Lakes Pro Series) - Karting Series in U.S.
- [CIK-FIA](#) (Europe)
- [FIK](#) (Federazione Italiana Karting)
- [Stars of Karting](#) - Karting Series in U.S.
- [WSK Promotional SRL](#) (International)

Autocross 賽車 (AUTOCROSS RACING)

- [SCCA](#) (Sports Car Club of America)

骨董車賽車 (VINTAGE/ANTIQUE RACE CARS)

- [Atlantic Coast Old Timers Auto Racing Club](#)
- [HSR](#) (Historic Sportcar Racing)

3. 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 and 地標的保存、修復上也是台灣做得最好的城市之一。然而，台南街道往往過於狹窄，隨著都市快速發展，原有的基礎建設已不敷需求，導致交通壅塞、街道混亂，不僅國際觀光客就連台灣居民也時常覺得很苦惱。台南在爭取中央補助新開發計畫上遭遇了許多挑戰，包括因應像莫拉克颱風一樣的重大天然災害，以及中央因各種政治或社經認知因素考量而優先選擇其他城市的政策議題。無論如何，儘管台南處境窘困卻也積極尋求解決之道。有兩個區域特別要在此討論：安平路及海安路周邊區域。

安平路是台南最受遊客青睞的熱鬧街道之一，市府已投注許多資源和心力在這個區域。成果令人滿意，安平路一帶有許多開放空間遊客可以到處逛逛，品嚐道地的府城小吃美食、欣賞地方特色小品。這個區域已劃定為「綠色區域」。

海安路則充滿藝術氛圍，令人想起紐約曼哈頓下城的格林威治村。這個區域人文氣息鼎盛，有各種地方藝文店家、美食小吃等，但當地交通情況卻可讓任何人玩興全失。市府曾計畫在海安路建造大型地下停車場，並限制地面交通只准送貨車輛可以進出，改造該區域為對行人和自行車騎士友善的寧靜環境；簡言之，將海安路打造為綠色觀光地帶。聽起來是很棒的計畫，但十五年過去了，在地下停車場終於已近完工之際卻仍舊聽到當地居民持續抱怨。事實上，這個創新的解決方案對開車或騎車前來此地的遊客甚為便利，應可複製到台灣其他各地。特別對身為外國人而言，這是解決停車問題的好方法。

台南在未來將擁有兩座很棒的博物館，奇美博物館預計將在兩年內完工，另一座美術館正在規劃階段。

台南的最大資產莫過於文化古蹟建築物不勝枚舉，終年吸引各地遊客的到來，還有各種美食小吃及娛樂活動包羅萬象。另一方面，台南的最大負擔在於缺乏有效的道路交通。雖然新通車的 84 號快速道路加上國一國三高速公路均通過台南，但市內交通擁擠混亂。地方各單位已協調整合試圖解決交通問題，但仍有許多改善的空間，中央補助也是不可或缺的一環。一旦有了更便利的交通運輸，將可促進台南經濟實質成長。再加上康寧、奇美及其他許多企業已為台南打下良好基礎，未來穩健的都市發展可期。

2011 台南發展政策

I – 打造文化首都領航台灣

- 打造屬於台南人的美術館（籌備中）
- 成立影視支援中心，協助帶動本市媒體製作產業的成長
- 保存、修復老屋和歷史遺跡（吳園、原台南愛國婦人會館、原台南縣知事官邸、鹽山博物館、原林百貨、原台南水道淨水區等）
- 支持和補助藝文活動，推動藝術教育，結合各級學校資源以從小培養孩子的藝術潛能和創意思維。
- 在各區活動中心辦理文化藝術活動、動態表演或靜態展示等，本年度已編列 74 個場次、每場次補助 2 萬元，補助總金額達 153 萬元，吸引超過一萬六千多位民眾參與。
- 積極推廣地方特色產業，開發在地文創商品，促進文創相關產業的合作參與，並鼓勵設計業者為各產業增加創新的價值。
- 2011 年 3 月 26 日台南市立文化資產管理處正式揭牌成立，開啟台南市文資保存的新紀元，為台南擁有的豐富有形和無形文化資產提供專業管理和維護，推廣文資保存和傳承，宣示建立文化首都的決心。
- 推廣地方文學研究發展、保存和展示：

- (A) 首屆「台南文學獎」2011 年 12 月 17 日於北門頒發，共有 30 人獲獎。
- (B) 為紀念表彰一代文學大師葉石濤對台南在地的貢獻，已選定原山林事務所為籌備設立「葉石濤文學館」的館址。

□ 推動發展文化創意產業：

- (A) 台南市提出「老台南、新時尚」的概念來推動流行時尚設計產業，編列 800 萬元的預算，目標要將府城形塑為古老文化和時尚設計兼容並進的都市，發展傳統文化和現代時尚融合的新興產業。
- (B) 舉辦「2011 台南古蹟藝術市集」，活動的發想在於開闢一個活潑熱鬧的戶外環境，推廣在地藝文特色商品，營造社區溫馨的氛圍。
- (C) 透過一系列採訪、錄影、記錄等方式建立生動的宣傳方式，來推廣在地文化歷史。這些媒材也可匯聚成一個現代的文化資料庫，便於大眾使用，藉此對文化、歷史、產業發展等產生正面的影響。專研文史的劉阿蘇先生的採訪在 2012 年 2 月完成；台灣戰後第一代本土女性建築師王秀蓮的採訪預定在 2012 年 10 月完成。

II – 加速招商、創造工作機會、促進台南經濟繁榮

□ 建構優質投資環境

(A) 「柳營科技工業區」開發計畫：

第一期開發區包括土地出售面積約為 81.57 公頃，佔可售土地面積達 97.32%。第一期預估可吸引投資額 49.6 億元，創造年產值 69.6 億元，增加 750 個工作機會。第二期開發區包括土地出售面積約為 65.45 公頃，佔可售土地面積達 94.51%。第二期預估可吸引投資額 157.8 億元，創造年產值 286.2 億元，增加 2,333 個工作機會。

(B) 「南科液晶電視及產業支援工業區」(樹谷園區) 開發計畫：

土地出售面積已超過 105.24 公頃（土地出售率達 68.6%），將可吸引投資額 204.3 億元，創造年產值 137.6 億元，增加 4,050 個工作機會。

(C)「永康科技工業區」開發計畫：

截至 2011 年 12 月為止，廠商申請案已核准計 115 件，土地出售面積達 76.31 公頃（土地出售率達 94.98%），將可吸引投資額 374.6 億元，創造年產值 236.9 億元，增加 7,758 個工作機會。

(D)「七股科技工業區」開發計畫：

此開發計畫的環境影響評估案已獲得環保署通過核定在案，但目前其他相關作業報告似乎尚未完成。

(E)「南紡世貿展覽中心」計畫：

台南紡織公司和工商時報出席 2011 年 6 月 22 日舉行的南紡世貿展覽中心合作案的簽約儀式。工商時報將在五年半內預計投入 7,700 萬元（2,500 萬元為改造興建費用，5,200 萬元為營運成本）。啟用第一年內預估將舉辦 12 場次的會展活動，到第五年時將逐步增加至每年 25 場次。南紡世貿展覽中心的第一場會展活動已於 2011 年 11 月舉辦。

(F)「台南老舊工業區更新改善」計畫：

台南老舊工業區更新計畫將獲得總補助金額達 NT\$36,427,500。佳里工業區將分配到 1,650 萬元，保安工業區 1,149 萬元，新市工業區 290 萬元，安定工業區 550 萬元；其餘較小的金額則是用於其他區域的更新計畫。目前這些更新改善工程已陸續辦理發包施作中。

□ 開創投資台南風潮：

(A) 招商成果：

台南縣市改制升格後已引進 225 個新廠商進駐，投資額達 1,056.7 億元，創造新的年產值達 947.64 億元，增加超過 2 萬個就業機會。

(B) 重大投資案：

大台南會展中心、台南 Crowne Plaza 飯店、萬國通路公司（行李箱製造商），以及其他 30 件大型投資案。

□ 推動發展新興產業：

打造科技大台南計畫：

1. 生技產業 – 「2011 大台南綠能與生技產業博覽會」11 月在南紡世貿展覽中心舉行，共有 400 多個攤位。除了實體展示外，還舉辦一系列的活動，包括綠能與生技產業論壇、最新產品技術發表會、產業調查結果發表、就業媒合會等。
2. 綠能投資 – 截至 2011 年 12 月為止，共有 8 家廠商（億芳能源、台灣超導節能、奇力光電、昱邦光電、綠鑄電能、聯合能源、達能科技、新世紀光電）已加入這項計畫，總投資額達 106 億元，預估總產值達 100 億元。
3. 電動車產業 – 台南市府已於 2011 年 6 月向中央政府遞交「智慧電動車先導運行計畫」構想書。
4. 流行時尚產業 – 「2011 台南意象流行時尚設計競賽」11 月 5 日於安平古堡舉行決賽。

□ 傳統市場更新改善計畫：

(A) 傳統公有零售市場的更新改善計畫總經費約 5,800 萬元。

(B) 總經費達 120 萬元的振興五大傳統市場商機計畫，促使市場銷售額增加 515 萬元，整體營收超過 1,900 萬元。

- 成立「火金姑信用保證專案貸款」計畫，協助台南的中小企業取得資金需求。

- 低碳經濟：

成立「台南市陽光電城推動專案辦公室」，專責太陽光電技術等議題。在「陽光社區」太陽光電系統補助計畫之下，2011 年 11 月已核准兩件補助案（分別為 17 戶、設置容量達 134kWp，以及 8 戶、設置容量達 24.38kWp）。

III – 建構具國際水準的觀光產業

- 整合觀光資源，加強城市觀光行銷：

為推動觀光產業，台南豐富的文化歷史古蹟、民俗節慶、特色小吃等觀光資源可加以整併，加強遊客資訊服務，打造對旅遊觀光友善的環境，大力推廣府城之美，目標是增加旅遊觀光產業帶來的經濟效益。

- 辦理全市大型文化節慶活動，舉辦具有四季農產品特色及主題的大型活動，帶領民眾從各種角度及視野認識在地文化、產業與歷史人文。
- 發展推動醫療觀光、高爾夫球旅遊、郵輪觀光和其他新興旅遊產業。善用現有的安平古堡與周邊區域的旅遊資源，運用水道運輸，大力推廣安平港國家歷史風景區。
- 台南機場：推動兩岸定期直航航班以及直飛日本和中國的包機業務

IV – 農業

- 2011 台灣國際蘭展成效卓越，外銷訂單金額達 70 億元，無疑展現了台灣精緻農業的堅強實力。
- 愛文芒果外銷總量約 1,665 公噸，外銷日本的數量更是創下歷年最佳記錄，達 1,160 公噸。
- 發展綠金農業，提高農產品之安全衛生：
 - 輔導有機農場辦理產銷履歷驗證：
2011 台南通過驗證的有機農場共有 129 間，總耕作面積達 215.71 公頃，包括 19 間有機米農場（11.53 公頃）、76 間蔬菜農場（143.43 公頃）、26 間果樹農場（44.74 公頃），以及 8 間種植其他作物的有機農場（16.01 公頃）。
 - 成立有機農業專區：
7 月 14 日台糖公司簽訂協議同意出租土地成立有機農業專區，總面積達 156,801 平方公尺。
- 活化休耕地措施，設立新農人學堂，吸引年輕人返鄉務農。
- 建立外銷管道，辦理農產品國內外展售促銷活動，協助低收入農戶增加收入來源，。

V – 推動綠能產業和永續低碳產業

- 2011 年 8 月 4 日行政院環保署宣布台南獲遴選為南部唯一低碳示範城市。
有八個主要面向來進行評比選定是否能成為低碳示範社區，包括低碳生活、低碳運輸、低碳觀光、多重綠能解決方案、節能減碳綠建材與建築工法、資源循環、低碳校園、生態都市機能等。

VI – 確保舒適、便利且安全的家園環境

□ 道路興闢拓寬工程：

2011 年底完成 8 條道路開闢工程，紓解交通壅塞，改善交通往來。

□ 向中央爭取到 27.5 億元補助特定道路興闢工程，其中 11 件已完工，道路總長達 12.3 公里，總施工費用約為 30 億元。

□ 交流道增闢改善工程：

(A) 增闢交流道：國道高速公路在台南地區將增設兩個交流道，工程施作預計分別在 2012 年 6 月和 11 月展開，2014 年 12 月完工。

(B) 仁德交流道改善計畫將分三階段進行

□ 新闢五條南科聯外道路建設工程

□ 總長度 8.23 公里的台南鐵路地下化工程預計將在 2017 年完工

□ 為改善市區交通壅塞問題，6 條市區新闢道路工程已完成，總建設費用為 5,860 萬元，建設長度達 1.85 公里。

□ 其他道路開闢拓寬計畫：

(A) 配合台南市路平專案（省道路段），共有 5 條路段進行拓寬和路面改善工程，總經費合計 3.7 億元，預計在 2013 年完成。

(B) 道路工程標準作業程序（SOP）：

1. 道路新闢或拓寬工程完成三年內禁止再挖。
2. 道路翻修改善完成一年內禁止挖掘。
3. 道路工程完成必須管制封閉交通，讓路面養護 6 小時後方能通車。

- 為強化公共安全，建立一套錄影監控系統，除了符合法規最低要求外也將人權保障納入考量。
- 交通安全設施之改善維護，包括加強道路標誌標線、增設反射鏡、交通標誌維護等。

VII – 水資源管理、災害防範、公共安全維護、保障生命財產安全

- 已完成 36 個水患治理計畫，另有 10 個計畫正在施作中。
- 加強中小排水疏浚工程、流域治理計畫、汙水處理設施等，以提升用水品質、降低水災所造成的損害。
- 研擬訂定台南市災害防救計畫

未來發展策略

為順利推動「陽光電城」計畫，台南市政府經濟發展局規劃了數個推動作法，分別說明如下：

- 成立專案辦公室

成立「陽光電城專案推動辦公室」，透過專業團隊人員，提供諮詢服務和社區倡議宣導活動，協助民眾了解分享太陽能節能減碳解決方案、加深對太陽光電技術的應用和效益的認識。

- 架設專屬網站

設立「台南陽光電城資訊網」，提供太陽光電專業資訊及法規訊息，並建立系統商與民眾之間的媒合平台。

- 協調銀行對綠能業者提供融資

協調國泰世華銀行和其他金融機構針對欲設置太陽光電系統的廠商或一般民眾提供優惠融資。國泰世華銀行已推出貸款成數最高可達八成、還款年期最長達 15 年的民眾自宅屋頂設置太陽光電系統的優惠融資專案，並設立專門的聯絡窗口。

- 促進社區宣導

辦理社區宣導座談會、採訪活動等，參與智慧綠能城市博覽會，發佈新聞稿加強活動行銷，製作一般文宣品。

- 推動公有房舍租賃機制

推動台南市公有房舍及一般商辦屋頂設置 8MW 太陽光電系統。

電動車產業

- 推動電動車產業在地發展
- 協助電動車製造研發
- 協助廠商轉型升級
- 協助充電站和電池技術應用的升級
- 協助電動車產業國內外行銷
- 打造智慧電動車運行示範區，協助帶動相關產業轉型，提升技術更新，電動車產業供應鏈整合，零組件轉換（例如 LED 車燈）等，協助汽機車電子、電機產業的能耗研發

綠能產業

3. 發展 PV 及 LED 產業

台南具有整體環境優勢，為太陽光電 PV 電池的生產重鎮，相關周邊材料已形成產業群聚，適合投資發展綠能產業。

4. 發展目標

藉由協助金屬製品產業（現有業者 1,310 家）、機械設備產業（876 家）以及汽車與零組件業者（432 家），綠能產業將帶動在地核心服務，使台南成為生態觀光和綠能投資的國際重鎮。

- 生技產業

以推動經貿發展為目標，從農業出發，經營生物科技、精緻農業產業、初級食品加工產業和水產養殖業。在農業和初級產業方面，發展重心在於穩定原料來源、環境監控與原料檢驗分析。藉由強化生物科技研發、農業資產、專業人才培育和資金挹注等，台南將可成為亞太生技研發製造重鎮，提供醫療觀光與生態觀光、有機農場及生技產業行銷等。

- 流行時尚和設計產業

台南具有深厚的在地文化特色，核心目標是將台南打造為國際觀光旅遊休憩重鎮。

- 台南是台灣製鞋、紡織業的大本營，相關廠商共有 480 家，包括紡織業 325 家、成衣及服飾品業 148 家、人造纖維業 7 家。
- 台南也是台灣設計科系密度最高的城市。

績效數據

(A) 2011 年台南市整體量化績效指標

績效指標	年底數據	成長率 (%)	五都名次
公司登記家數	29,710 家	795 家 / 2.75%	1
公司登記資本額	7,759 億元	314 億元 / 4.22%	3
商業登記家數	56,107 家	922 家 / 1.67%	2
商業資本額	102 億元	4.6 億元 / 4.69%	2
勞工保險人數	713,954 人	28,350 人 / 4.14%	2

註：勞工保險人數為 2010 年 11 月與 2011 年 11 月數據相比

資料來源：經濟部商業司、行政院勞委會勞工保險局

(B) 2011 年台南市政府工業區招商成果：

2011 年台南市政府工業區新增投資 225 家，投資總額達 1,081 億元，預估年產值 911.6 億元，創造就業人數 20,704 人。

1. 永康科技工業區新增投資 45 家，投資總額 362.5 億元，預估年產值 220.6 億元，創造就業人數 7,382 人。
2. 柳營科技工業區新增投資 44 家，投資總額 239.6 億元，預估年產值 321.2 億元，創造就業人數 3,008 人。
3. 樹谷園區新增投資 5 家，投資總額 204.3 億元，預估年產值 137.6 億元，創造就業人數 4,050 人。

(C) 台南市未來重要投資招商計畫

在經建會推動的「產業有家，家有產業」政策下，台南已選定未來將朝向「綠色能源」、「生物科技」、「文化創意」等為重點產業發展。

1. 高鐵會展中心

台南市已於交通部高鐵工程局合作開發會展中心，預計經營規模可容納 600 個攤位數，並提供相關附屬商業設施，引進相關優良潛在廠商進行媒合，預計總投資金額約 18 億元。

2. 國有土地合作開發

台南市與財政部國有財產局合作辦理國有土地合作開發，在鄰近台南市商業精華地區，打造一座綜合型園區，創造年產值約 1.6 億元和 1,000 個就業機會。

規劃概念以符合台南文化、科技、綠能等內涵為主軸，並與周邊服務業、餐飲、精品百貨異業結盟，採用多元化模式經營。此投資開發案將可帶動地方傳統文化產業與商業的發展、提高周邊地區的商業活動以及提升土地使用效能。

未來展望

台南市陽光電城計畫的推動未來將結合中央政府「百萬屋頂」政策，擴大台南市太陽光電應用的需求，引領太陽光電 PV 模組製造商、系統商與電廠投資業者、相關服務業者進駐大台南地區，促使台南的綠能產業發揮群聚效應，提升行銷全球的能力，進而實現「永續大台南」的政策方針。最終目標是要將台南打造為國際級綠能應用的示範城市。

台南觀光產業發展願景

對於文化古蹟、鄉村特產及生態資源如何結合觀光發展商機，目前的計畫措施及未來的施政目標說明如下：

1. 發展文化觀光路線、開拓就業機會。
2. 府城文學地圖：文化首都台南本身就是一座生活博物館。誠如台灣文學大師葉石濤筆下所描繪的府城文學地圖 - 這是個適合人們做夢、幹活、戀愛、結婚、悠然過日子的好地方。透過文學地圖路線場景的行走，追尋葉老走過的路線、吃過的東西，遊客必能發現完全不同的文學氛圍。台南市將增加文化預算編列，促進文化觀光產業的發展。

夜市

台南擁有數個夜市均頗受遊客歡迎，但這些夜市的位置靠近許多新建成的高級住宅區，人車壅擠和停車問題已對市府帶來挑戰。一方面熱鬧夜市帶來大量人潮，但另一方面這些區域的房價也因鄰近夜市而下滑。這個複雜的問題仍有待解決。這些夜市是否能另覓其他更適合且交通進出一樣便利的地點？

結論

高雄美國商會第三年度的南台灣白皮書擴大納入高雄、台南及屏東等三個縣市。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，地方政府的施政重心均放在招商及促進就業。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。面對歐債危機和美國經濟停滯不前，再加上中國製造能力的崛起以及墨西哥、巴西等新興競爭對手，台灣面臨許多嚴峻挑戰。然而，台灣人民堅強的創業家精神是其最大資產。

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，其中也期盼吸引美商進駐。在本次白皮書中提到的開發案，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。本次白皮書並未討論的一個議題是台灣企業可以作為美中商業投資之間的中間人或聯絡人。對於想要到中國做生意卻又因害怕智慧產權被侵犯或缺乏對中國法律文化的認識而裹足不前的美商來說，台灣提供了有趣的優勢。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。這對所有人而言都具有潛在商機，南台灣值得對此深究。

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

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