



聚焦臺北—兩岸服務經貿 臺北展先機

■ 聚焦臺北

兩岸服貿協議對臺北市服務業的契機與挑戰：服務業占臺北市產業結構高達八成，其中批發零售服務業比重占全市營業額40%以上，其次為金融服務業、通訊傳播業及營造業。可以預見的是，兩岸服貿協議簽署完成後，陸資仍將持續以臺北市做為投資之首選地區，因此臺北市可能是各縣市中受惠最大、潛在影響最直接之城市。未來產業發展之重點，將集中在文化創意、觀光旅遊、國際美食、會展、醫療及金融等主軸產業上。然而另一方面需要注意的是，亦可能出現人才流失、外派人員家庭教育等議題造成壓力，因此「育才」、「留才」與「攬才」將是未來政府的重要工作。

兩岸服務貿易協議的金融產業開放效益：臺北不僅是我國政治、經濟及文化的匯集地，其便捷的交通及國際化的生活機能，更是國內各大金融機構總部及研究中心的所在地。兩岸服貿協議簽署後，宣告金融業大展身手的時刻來了，在政策方面建議臺北市應盡速設立「金融

專業園區」，聚集股市交易中心、外匯結算中心、金融爭議解決中心等重要金融機構；另一方面需強化金融專業與國際外語人才的培訓；最後，營造兩岸財富管理中心，吸引更多兩岸財富聚集，形成良性循環，進而更加提升臺北市經濟發展。

電子商務線上遊戲 登陸大突破：兩岸服貿協議中確定，陸方開放網路內容供應商經營許可證持股達55%，超越陸方目前對全球所有國家或地區所設定之持股條件，有利臺灣電子商務業者布局中國大陸，因此臺灣大型平臺業者將領先其他競爭者搶占商機；另一方面線上遊戲產業同樣在兩岸服貿協議中獲得大利多，臺灣所研發之線上遊戲產品的內容審批時限縮短為2個月，有助掌握遊戲出口時機，更可協助臺灣遊戲更迅速進入中國大陸市場。在兩岸服貿協議生效後，政府應持續強化周邊配套工作，才能具體落實簽署效益。

城市萬花筒

■ 臺北·最前線

上海招商引資 雙城互利交流：臺北市與上海市均為亞洲地區指標城市，近年來兩市透過輪流舉辦城市論壇，交換城市建設及管理經驗，建立深化且實質的合作模式，有鑑於此，臺北市政府籌組「2013年臺北市經貿訪問團」於7月2日至4日赴上海行銷招商，主辦「2013臺北市產業商機論壇」並於此行中參與上海市辦理的「2013上海·臺北城市論壇」，此行除了積極協助臺北市招商外、更針對市政建設參訪與交流，其中包括參訪上海市多媒體谷產業園區等交流行程。

臺北出發 商機無限：為了吸引陸資赴臺北市設立據點與投資，臺北市政府特別主辦「2013臺北產業商機論壇」，本次論壇主題包括：掌握智慧終端與行動寬帶的資訊通訊商機、如何協助企業在資本市場籌資暨推動優良企業來臺上市、協助企業成功發展、加強交流，擴大合作、中國大陸零售行業的崛起與未來以及布局

上海臺商經驗分享等。本次的論壇吸引非常多的上海企業參加，更是歷年活動中陸資企業參加最多的一次，顯示陸資企業對本次商機論壇的重視。

亞太經貿展先機 國際招商搶先行：為了加速拓展亞太經貿市場臺北市政府於2010年成立「亞太經貿服務中心」，整合臺北市政府相關局處資源，統籌招商引資工作，提高行政效能。在陸資暨臺商投資經貿交流方面，臺北市政府於2010年便籌組經貿訪問團赴大陸上海進行經貿交流，並辦理「臺北市投資說明會」，2012年的辦理「陸資暨臺商投資經貿交流計畫」，2013年籌組臺北經貿訪問團，舉辦「2013臺北市產業商機論壇」；而在亞太地區招商活動部分，也舉辦一系列的日本行銷招商活動，並積極接待各國參訪團，建立完善交流平臺。

Focus Taipei-Taipei takes preemptive opportunities from the Cross-Strait Agreement On Trade in Services

■ Focus Taipei

Opportunities and challenges from Cross-Strait Agreement On Trade in Services for service sector in Taipei City: The service sector in Taipei City constitutes as high as 80% of the municipality's industrial structure, with the wholesale and retail services contributing more than 40% of the city's turnover, followed by the financial services industry, the information and communications industry and the construction industry. It is foreseeable that after the signing of the agreement, mainland China investment will continue to choose Taipei City as a prime area for investment. As such, Taipei City stands to benefit most, with the more potential impact from the agreement than other cities and counties. The focus of future development for the city will center on such key sectors as cultural innovation, tourism, international cuisine, shows and exhibitions, healthcare and finance. On the other hand, issues of brain drain, and family education for expatriates could emerge as sources of stress and as such, talent "nurturing," "retention" and "recruiting" will become tasks of crucial importance for the government in the not too distant future.

Benefits of financial industry liberalization from Cross-Strait Agreement On Trade in Services: Taipei City is not only the political, economic and cultural center of Taiwan, but also a point of convergence for the headquarters of various domestic financial institutions and research centers due to its easy of accessibility and convenient facilities promoting international lifestyles. The signing of the agreement also means that it is time for the financial sector to shine. In terms of policy, it is recommended that Taipei City should establish a "Finance Park" as soon as possible to bring together major financial institutions such as the stock exchange, FOREX

settlement center, financial dispute resolution center etc, while strengthening the training and cultivation of individuals who specialize in finance and foreign languages. Lastly, the government would do well to establish a cross-strait wealth management center to attract more assets from Taiwan and China in order to create a positive cycle that would further facilitate the economic development of Taipei City.

Electronic commerce: online games-a major breakthrough in penetrating the mainland China market: The terms of Cross-Strait Agreement On Trade in Services stipulate that the mainland China government will open its market for digital online content and allow offshore providers of online content acquire as much as 55% of the shares in domestic companies with a business operations permit. This exceeds all other existing legal shareholding caps the Chinese government has permitted for businesses from other nations and territories around the world and is therefore especially beneficial for Taiwanese electronic commerce operators looking to acquire a foothold in mainland China. Naturally, ECFA gives Taiwanese operators of large online platforms a unique edge for business opportunities compared with other competitors. Not only that, the online gaming sector also receives other major benefits from the agreement-for example, content review for online game titles developed by Taiwanese companies will be cut to 2 months, which helps game developers better manage the timing of product exports, while allowing Taiwanese games to penetrate the mainland China market more rapidly. Once the terms of the agreement officially take effect, the government should keep up its efforts to improve auxiliary measures in order to truly capitalize on the benefits of the agreement.

City Kaleidoscope

■ Taipei Frontline

Business solicitation in Shanghai-an exchange of mutual benefits for the two cities: Both Taipei City and Shanghai are recognized as major cities in Asia and the have held various bilateral city forums on a rotating basis over the past few years, for exchanging experience on city construction and administration in order to establish an in-depth and concrete model of collaboration. It was with this objective in mind that Taipei City government assembled its "2013 Taipei City economic and trade delegation" to visit Shanghai from July 2nd-4th, to host the "2013 Taipei Industrial & Commercial Opportunities Forum" while attending the "2013 Shanghai-Taipei City Forum" hosted by the city of Shanghai. The trip not only involved proactive business solicitation for Taipei City, but also included visits and exchanges related to city administration, with activities including a visit to the Shanghai Multimedia Valley TusPark.

Setting out from Taipei-unlimited business opportunities: In an effort to appeal to mainland China investors to establish their bases of operation and invest in Taipei City, Taipei City Government hosted the "2013 Taipei Industrial & Commercial Opportunities Forum," with topics covering: capitalizing on business opportunities in information communication through smart end-point and mobile broadband technologies; assisting outstanding businesses to become listed companies in Taiwan and raise funds in the capital market; assisting corporations to achieve successful development, strengthening exchanges, expanding cooperation, the emergence, rise and future of

China's retail industries along with Taiwanese businesspeople sharing their experiences of doing business in Shanghai. The forum attracted the participation of Shanghai corporations and set a new record for the most Chinese corporations in attendance. This clearly reflects the importance Chinese companies attach to the forum.

Preemptive opportunities in the Asia-Pacific market-a head start seeking international business: Taipei City Government established the "Asia-Pacific Economic and Trade Service Center" in 2010 to integrate the resources of relevant Taipei City government departments, oversee business solicitation and fund raising operations, thereby improving administrative efficiency. With regards to exchanges on investment and trade between Chinese businesses and Taiwanese firms, Taipei City Government has been sending economic and trade delegations to Shanghai since 2010 and has organized events such as the "Taipei City Investment Seminar" and the "Investment and Trade Exchange Program for Chinese and Taiwanese Businesses" (2012). This year, Taipei City Government has also assembled a Taipei City economic and trade delegation and organized the "2013 Taipei Industrial & Commercial Opportunities Forum" in Shanghai. As for business solicitations in the Asia-Pacific region, Taipei City Government has also held a series of marketing and business events in Japan while actively receiving delegates from different nations in an effort to establish a comprehensive platform for relevant exchanges.

■ 國際城市快遞

FTA卡位戰 韓國的經貿自由化之路：從2004年韓國第一個FTA正式生效到現在，短短九年間，已經成功簽署並生效的FTA高達8個，締約國更衝到45個國家，貿易量涵蓋率達到35%，若依締約國GDP計算，韓國在全球的經濟領土已達到61%，名副其實成為世界貿易大國。本

文分析其戰略乃透過搶攻各大洲據點國家、同步多軌洽簽、全面性協商、結合能源外交政策等策略，讓韓國這匹黑馬在短時間之內衝出國際。此外，韓國政府更採用完整的全民宣傳與企業補償計畫，務實面對簽訂FTA可能帶來的負面效應。

臺北競爭力

迎接未來挑戰 臺北市準備好了：本期採用經濟學人研究機構2013年6月公布的「關鍵熱點—2025年全球城市未來競爭力評比」。相較於2012年的評比成果，臺北市全球排名大躍進14名，與世界金融中心蘇黎士並列全球第11名，領先包含華盛頓、首爾、洛杉磯、法蘭克福等

國際樞紐城市；於亞洲則排名第4名，城市前景令人相當期待。此外，參考2013年7月遠見雜誌公布的「2013縣市總體競爭力大調查」，臺北市不僅奪下全國排名冠軍寶座，也是五都之冠，在國內持續扮演領頭羊的角色，帶領其他城市向上提升。

經濟觀測站

■ 國際經濟情勢分析

過去經濟表現相當活躍的新興市場，隨著各方面的問題繼續惡化，已經開始明顯影響全球經濟；而歐元區儘管已經走出衰退深淵，但整體需求依舊低迷，發展前景仍需保守評估；而一片看好的美國，也因為全面修訂了國民帳戶數據，一舉拉低了全年經濟成長的總體水平。綜合各項因素判斷，對2013年及2014年全球經濟的預測已漸漸出現好轉。

消費者物價指數較2012年同期上揚4.1%，2012年第2季經季節性因素調整的失業率為3.3%。上海2013年6月消費者物價指數為102.5，與2012年同期相比上升2.5%，外商直接投資合同項目較2012年同期成長17.0%，第三產業投資比重占絕對主導地位。

■ 亞洲城市動態—東京、新加坡、香港、上海

東京2013年6月工業生產指數較5月下降15.4%，6月消費者物價指數較5月下滑0.1%，6月平均薪資較2012年同期增加2.6%，2013年第2季失業率為4.2%。新加坡2013年第2季GDP較2012年同期成長3.8%，2013年6月失業率上升至2.1%，工業生產指數則較5月下滑3.1%，2013年6月消費者物價指數較2012年同期上揚1.8%。香港2013年第2季GDP較2012年同期成長3.3%，2013年6月

■ 國內經濟情勢分析

雖然全球經濟走緩及歐盟經濟疲弱，中國大陸成長低於預期，但我國電子產品、礦產品、光學器材、塑膠製品及資通信產品等出口增長帶動下，出口增加2.43%，商品及服務輸出則較2012年同期成長5.16%；民間投資方面，雖然國內半導體業者持續擴大資本支出，但存貨變動因美國QE退場疑慮，國際原物料價格下跌，廠商加速存貨調整步調，第2季資本形成較上年同期實質負成長2.84%，經濟成長率初估為2.34%。

產經臺北

■ 臺北產經動態分析—2013年第2季

2013年第2季消費者物價指數年增率上漲0.41%，營建動態部分建照核發與建照使用在坪數的改變形成強烈的對比。此外，臺北市觀光產業表現持平，過去來臺旅客大宗的日本觀光客受到日圓貶值持續發酵影響來客數大減，導致客房住房率年增率下滑5.37個百分點。投資動能方面，受到全球的景氣動盪，尤其歐洲

經濟疲弱、中國大陸成長動能停滯、美國國債問題尚未解決，都直接影響僑外投資的規模，2013年第2季僑外投資金額年增率負13.17%。2011年工商及服務業普查各項指標臺北市呈現成長；場所單位數及從業員工人數臺北市名列五都之首，五大行業生產總額臺北市占比高達34.47%。

■ Metropolitan Express

Free Trade Agreements (FTAs): the path to economic and trade freedom for South Korea: Ever since signing its first FTA that came into effect in 2004, Seoul has enacted eight additional FTAs in 9 years. Moreover, South Korea has also increased its number of FTA partner countries to 45 and raised trade coverage to 35%. Based on the GDPs of South Korea's FTA partner nations, Seoul has effectively secured as much as 61% of global economic territory and emerged as a major global trade power. This article will offer an analysis of South

Korea's strategy of developing trading relations with nations on different continents to achieve simultaneous, multi-track negotiation/signing and comprehensive negotiation coupled with energetic diplomatic policies, that have enabled the country to pull ahead of its competitors. Not only that, the South Korean government has also adopted fully-fledged dissemination programs and corporate compensation packages as solutions to offset the potential negative impacts of signing FTAs.

Taipei Competitiveness

Facing future challenges Taipei is ready: In this issue, we will take a look at "Hot spots 2025-Benchmarking the future competitiveness of cities" published by the Economist Intelligence Unit (EIU) in June 2013. Compared with the benchmarking results of 2012, Taipei City made a tremendous leap in placement by advancing 14 positions, ranking 11th along with Zurich, the heart of global finance and ahead of other international metropolitan hubs including Washington DC, Seoul, Los Angeles and Frankfurt. In terms of Asian cities,

Taipei City ranked 4th among the evaluated cities. In addition, according to the "2013 Municipality Overall Competitiveness Survey" published in the July issue of Global Views Monthly magazine, Taipei City not only came first among all cities and counties in Taiwan, but also ranked 1st out of the nation's five metropolitan areas. Taipei City shall continue to play the role of a bellwether in Taiwan pointing the way for other cities seeking improvement and growth.

Economic Observatory

■ International Economic Overview

Despite having achieved impressive economic growth in recent years, emerging markets have begun to have a noticeable impact on the global economy as various issues and problems continue to escalate. Although the Eurozone has managed to escape depression, the market is still suffering from low demand and as such, prospects for development remain on the conservative side. In contrast, despite its promising economic outlook the US has dragged down the overall level of economic growth for the fiscal year through adjustments in the calculation of GDP. Nonetheless, various factors have gradually led to more positive forecasts for global economic performance in 2013 and 2014.

■ Asian City Overview—Tokyo, Singapore, HK, Shanghai

Tokyo's June 2013 manufacturing production index declined by 15.4% compared to the previous month, the CPI in June dipped slightly by 0.1% compared to the previous month, and June average income increased by 2.6% (YOY). In 2013 Q2, the unemployment rate was 4.2%. Singapore's 2013 Q2 GDP increased by 3.8% compared to the same period in 2012, the unemployment rate in June 2013 increased to 2.1%. The June 2013 manufacturing production index fell by 3.1% compared to the previous month and the CPI in June 2013 increased by 1.8% (YOY) compared to the same period in 2012. HK's 2013

Q2 GDP increased by 3.3% (YOY) compared to the same period in 2012, the CPI in June 2013 increased by 4.1% (YOY). Whereas the unemployment rate from 2013 Q2, after seasonal adjustment, was 3.3%. Shanghai's CPI in June 2013 was 102.5, an increase of 2.5% (YOY). The number of FDI contracts increased by 17% (YOY) compared to the same period in 2013, with the tertiary industry accounting for the highest percentage.

■ Taiwan Economic Overview

In spite of a stagnant global economy and weak economic situation in the EU, as well as lower-than-expected growth in China, Taiwan's exports grew by 2.43%, thanks to growth in the export of electronic products, mineral products, optical equipment, plastic products and ICT products, while merchandize and service output grew by 5.16% (YOY) compared with the same period in 2012. With regards to private investment, despite efforts by domestic semiconductor manufacturers to expand their capital expenditure, concerns over the exit from quantitative Easing (QE) in the US and the falling prices of international raw materials have driven manufacturers to accelerate inventory adjustments. As such, 2013 Q2 capital formation has suffered from negative growth of 2.84% (YOY) compared with the same period in 2012. Preliminary forecast of economic growth in Taiwan is 2.34%.

Taipei Econ

■ Taipei Econ Overview – 2013 Q2

The year-on-year growth rate in the CPI was 0.41% in 2013 Q2. As for the dynamics of the construction sector, the issue and use of building permits has shown stark contrast with the changes in site areas. Although the tourism industry in Taipei maintained its performance, the number of Japanese tourists has fallen dramatically due to the continuous depreciation of the Japanese Yen. Consequently, occupancy rates in 2013 Q2 fell by 5.37% (YOY). As for investment trends, factors such as fluctuations in the global economy, notably the slumping growth of the European economy and China's stagnant growth,

coupled with the unresolved issue of the US national debt have directly affected the scale of overseas Chinese and foreign investment. The amount of overseas Chinese and foreign investment in 2013 Q2 showed negative growth of -13.17% (YOY). The results of the 2011 Industry, Commerce and Service Census indicate growth in different areas for Taipei City, whose business venues and number of employees put Taipei City in first place among the five metropolitan areas. Taipei City accounted for as much as 34.47% of the gross product of the five major industries. 