



Review on the Business Model of Development Zones in Foreign Countries



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Executive Summary

This report is designed to help Caofeidian understand business models of development zones in foreign countries. To facilitate this, this report will examine opportunities for Caofeidian to improve, and provide recommendations in the context of critical success factors observed in four case studies.

To best assist Caofeidian, a SWOT analysis was conducted to identify avenues for improvement. It was found that Caofeidian's strengths lie in location, natural resources, cost and the planned eco-city, while its weaknesses lie in the legal and regulatory areas, infrastructure, and marketing and positioning.

Next, a detailed analysis of four selected foreign development zones was undertaken. The four zones were: Docklands (United Kingdom), Sri City (India), Jurong (Singapore), and Ruhr (Germany). Each zone (and Caofeidian) was analyzed across three dimensions (geography, infrastructure, strategy), while the host countries (plus China) were examined against a PEST analysis (political, economic, social, technological). Finally, in each zone, the critical success factors were identified. For Docklands, the success factors were the powers granted by government, the market orientated strategy, infrastructure construction, and geography. For Sri City, the clear strategy and positioning, environmental responsibility, population base, and special economic zone status contributed to success. For Jurong, the success factors were planning, positioning, infrastructure construction and pro-active attraction of foreign investment. Lastly, for Ruhr, diversified portfolio, strong internal connections, inter-firm linkages, and the seeking of alternative industry drove success.

The success factors identified were converted into recommendations for Caofeidian: first, Caofeidian should position itself to attract both domestic AND international investment –

with suitable strategy, planning and marketing for both; second, Caofeidian should accelerate infrastructure construction to improve the investment environment; third, Caofeidian should be aware of the limitations of non-renewable resources, and must investigate alternative industries as well, and finally; Caofeidian should introduce a clear marketing strategy about the type of corporations it wants to attract, and market appropriately.

1.0 Objectives

The primary objective of this report is to help Caofeidian understand business models of development zones in foreign countries. To facilitate this, this report will:

1. Examine opportunities for Caofeidian to improve and;
2. Provide recommendations in the context of critical success factors observed in case studies.

The report will be organized in the following manner:

- **Literature Review:** This will be used to introduce the concept of business development zones and to provide a theoretical background to the topic.
- **Caofeidian Analysis:** To provide Caofeidian with relevant recommendations, an analysis will be conducted to discover opportunities for improvement.
- **Case Studies:** Four case studies will be examined in detail. Each study will include country and zone-level analysis and detail of the critical success factors.
- **Recommendations:** Based on the critical success factors, we will present recommendations for Caofeidian to strengthen their business model.

This framework will increase Caofeidian's understanding of foreign business development zones, and assist Caofeidian with strengthening their business model.

2.0 Literature Review

Definition – development zones

Caofeidian use the term “development zone” in a broad manner, to describe zones designed to attract investment. Similarly, our literary review found no universal definition of the “development zone” term. Rather, the term is used largely in connection with concepts such as industrial parks, Free Trade Zones (FTZs), Export Processing Zones (EPZs), Special Economic Zones (SEZs) and Economic and Technical Development Zones (ETDZs).

Industrial parks—specific enclaves for industrial development—were first established in Manchester, England, in 1896 (World Bank 1991). Free Trade Zones were first established in Europe in the 1950s, and can be defined as zones that fall outside a domestic economy's tariff zone. Originally, these FTZs were primarily small areas located near air and seaports to hold goods. In the 1960s industrial parks and FTZs were merged with the creation of the world's first dedicated EPZs in countries such as India and Taiwan. O'Sullivan and Sheffrin define EPZs as “special areas of a country where some normal trade barriers such as tariffs and quotas are eliminated and bureaucratic requirements are lowered in hopes of attracting new business and foreign investments” (2002). The SEZ—the modern edition of the EPZ—as seen in countries such as China, India and Pakistan, is defined by Ge as “a geographic area within a country where certain economic activities are promoted by a set of policy measures that are not generally applicable to the rest of the country” (1999). The Indian Government SEZ policy describes the zones as “duty-free enclave[s], deemed to be foreign territory for the purposes of trade operations and duties and tariffs (EXIM Policy 2000, cited Sri City website)”. The “development zone label” has also been used to refer to ETDZs, which were first established in China in 1984 (Ma 2004). ETDZs are zones designed with the aim of

developing the high-tech industry, focusing on industrial projects, absorbing foreign fund and building up export-oriented economy” (Linhe 2005).

Motivators of investment

Next, research was undertaken in the area of factors that contribute to attracting investment, particularly foreign investment (with a focus on special economic zones). Glaister and Taoglu (1998) found market potential, Government regulations and incentives, investment risk, comparative cost advantages, strategic locational advantages, and labour supply and infrastructure to be the six key determining factors. However, financial incentives on their own appear to have “relatively little” impact on the choice of location of investment (Batchler and Clement 1990). Carson et al (2003) identify the following primary motivators of investment location choice: size and growth of the host market, government emphasis on FDI and financial incentives, economic policy, cultural closeness, costs of transport, materials and labor, resources, technology, political stability and infrastructure. Additionally, country and company commitment to corporate social responsibility is increasingly a driver of investment intentions (Goyal 2006).

3.0 Caofeidian

To provide recommendations useful to Caofeidian, we have conducted an analysis of the Caofeidian development zone, to discover areas for improvement.

3.1 Zone Overview

Caofeidian is a 310km² development zone located on Bohai Bay, Hebei Province. It is 220km from Beijing and 80km from Tangshan. Planning for the zone began in 1992; after careful planning the Party Work Committee & Administrative Commission of Caofeidian were officially set up on October 8, 2005.

According to China's Energy and Transportation Development Strategy, Caofeidian has been developed to:

1. Optimize heavy industry in North China;
2. Increase economic development in the Huanbohai Region;
3. Demonstrate a recyclable economy of modern-industry.

The geography of Caofeidian makes it conducive to a development zone. It is located on the coast, alongside a deep-water zone, making it suitable for an international port. It has broad beaches with space for city development and near-port industry. Beneath the land lies extensive oil. Caofeidian is next to the city group of Beijing, Tianjin and Tangshan, with convenient road and rail links. Caofeidian is an important link between China and international sea routes.

A major "eco-city" township is planned for Caofeidian. It is expected that 500,000-800,000 people will live in the 150km² eco-city upon completion. The eco-city is a partnership

between Caofeidian and several Swedish companies. Construction began in 2009. Stage one is expected to be completed in 2012.

So far, major Chinese companies have invested in Caofeidian, including Shougang, Metallurgical Group, China National Petroleum Corporation, Wenfeng-Jiayan, Tianjian Bohai Oil, and Marine Engineering Corporation. International investment so far has been limited to Sojitz Corporation (Japan) and Aker Kvaerne (Norway).

3.2 SWOT

A SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis has been conducted to get an overview of the Caofeidian business model and areas where there is opportunity to improve. The opportunities for improvement will form the basis of our focus in the case studies and recommendations.

The SWOT Analysis results are summarized in the table below, with a full breakdown in the next section.

	Internal	External
Positive	Strengths Location Natural Resources Cost Planned City	Opportunities Chinese economic strength New markets
Improvement Required	Weaknesses Legal Infrastructure Continuity Marketing	Threats New competitors Global Financial Crisis

Table 1: SWOT analysis of Caofeidian

3.2.1 Strengths

- **Location:** The site is readily accessible by road (freeways), sea (deep-water ports) and rail. It is just 80km from Tangshan, and 220km from Beijing.
- **Natural Resources:** Caofeidian is situated on land abundant with resources, particularly oil. With desalination available, fresh-water is available for manufacturing processes.
- **Cost:** Land and labor costs are low, providing a financially attractive location.
- **Planned Eco-City:** When completed, Caofeidian workers will be able to live close to the workplace. The planned population base within the development zone will help attract service and commercial industry.

3.2.2 Weaknesses

- **Legal:** Caofeidian does not have an Intellectual Property Rights (IPR) Officer, and there is some ambiguity over resolution of contract breach disputes. As such, there is room to improve the zone's legal and regulatory aspects.
- **Infrastructure:** The infrastructure in place is excellent, however acceleration of infrastructure construction may increase the attraction of the area. For instance, renewable energy plants, landscaping, fast-tracking of eco-city project.
- **Continuity:** Some vagueness and ambiguity was observed in our discussions with Caofeidian. Particularly, there was ambiguity over the type of investment Caofeidian would like to attract. A more uniform, clear direction may be beneficial.
- **Marketing:** Marketing of Caofeidian outside the immediate Hebei Province area appears relatively limited.

3.2.3 Opportunities

- **New Markets:** Many of China's neighbouring countries are starting to develop (for e.g. Vietnam, Laos, Cambodia). These countries may present new customers for the Caofeidian development area.
- **Strength of Chinese Economy:** Despite the ongoing Global Financial Crisis, the Chinese economy is still growing rapidly (7.2% forecast in 2009 – World Bank). The government's RMB¥ 4 trillion stimulus package will also help keep China strong.

3.2.4 Threats

- **Global Financial Crisis:** Although China is weathering the GFC storm extremely well; many Asian and Western economies have been devastated. Potential customer countries that have been hit very hard include South Korea, Japan, the United States and the United Kingdom. There is a possibility however, that this may present an opportunity for Caofeidian as companies look to save money.
- **New Competition:** Caofeidian must be aware of the threat of new competition, particularly from Special Economic Zones in neighboring countries, and from countries that have less mature economies and are able to offer cheaper land and labor.

4.0 Case Studies

4.1 Introduction

This section will analyze four case studies and compare them to Caofeidian. The four case studies that have been selected for analysis are: Docklands (United Kingdom), Ruhr Valley (Germany), Jurong (Singapore), and Sri City (India). The reason for selection of each zone is outlined below:

- **Docklands:** First, it is a successful example of a foreign zone, and representative of European development zones. Second, the Dockland's development cycle is complete, so we can research its history from start to finish, and assess the zone's reactions to problems that arose. Last, it is a comprehensive development including industry, commercial, housing and community; this experience is invaluable for Caofeidian which is hoping to conduct a similar mixture.
- **Sri City:** First, as with Caofeidian, Sri City is located in a BRIC country (Brazil, Russia, India, China). India, like China, is a country that is geographically large, with a high-population and fast-economic growth; second, Sri City is also constructing a planned-city ("integrated township"), similar to the eco-city at Caofeidian; third, Caofeidian can learn from Sri City and the zones' ability to attract foreign investment.
- **Jurong:** First, Jurong contributed greatly to the immense growth of the Singaporean economy (the zone was critical to the country's status as an "Asian tiger"); second, Jurong is an island whose initial core industry was heavy industry (such as steel/iron/petro-chemistry); third, the development was closely monitored by the government. These three aspects of Jurong's development are similar to that of

Caofeidian.

- Ruhr: The Ruhr area played a pioneering role in meeting the challenges of fundamental structural changes in Germany's economy, society, and technical environment. The main reason Ruhr was selected is because Ruhr has admirable development experiences that show how it survived tough conditions. Additionally, Ruhr has similar competitive advantages with Caofeidian, such as convenient transportation and rich nature resources (petrol oils).

4.2 Overview of Zones

4.2.1 Docklands, United Kingdom

The London Docklands Urban Development Area (UDA) is located on the River Thames and was established in 1981. It was the largest urban development project in Europe last century. Prior to its establishment, Docklands was so old and dilapidated that it was effectively isolated from the rest of London. But after the developed project (which lasted for nearly 17 years and finished in 1998), it successfully became a prosperous commercial-oriented region integrated with some industry. It is not only the biggest development area in England—it can also be seen as the epitome of the development area in developed countries, with all the various problems it encountered in the development progress.

	1981	1998
Population	39,000	84,000
Job Opportunities	27,000	84,000
Housing	15,000	36,000
Private Housing (%)	5	44
Companies	1014	2600
Employed Residents	5200	10500

Table2: Change at Docklands 1981-1998

The Strategies of Docklands

- Construction of the revitalized physical environment to improve the image of the area rapidly, to help to attract investment.
- Using the limited development fund primarily as a lever to attract private investment.
- Purchase of as much public land as resources permitted, promotion of development of the whole area by developing the land under a market-oriented development policy.
- Improved the transport condition of the whole area, including the roads and public traffic conditions up to the standard enjoyed in other parts of Great London.
- Stimulated the market demand by directing the investment to improve the amenities of the community.
- Marketing of the area.
- Self-promoted through the rolling development model.

This market-oriented strategy dominated the ideas and methods during the whole development process. In order to promote the development of Docklands, the central government spent a lot of money every year. At the beginning when the zone was established, LDDC's 80% development fund came from national investment, most of which was used to build the roads, develop the land, and repair the constructions. For example, until the early 1990s, the LDDC invested £77 million pound to construct the light railway in the area. It also constructed the City Airport of London as well as communication infrastructure. All of these have significantly improved the investment environment of Docklands and made it more attractive for the investment.

4.2.2 Sri City, India

The Sri City Special Economic Zone was announced in 2008 and is located approximately 55km North of Chennai on the border of the Andhra Pradesh and Tamil Nadu states. Sri City SEZ was master-planned and designed by Jurong Consultants of Singapore. It is India's largest multi-purpose SEZ. The Andhra Pradesh Industrial Infrastructure Corporation (APIIC) & Industrial Area Local Authority (IALA) administer the zone. It has been

Sri City has been designed to attract foreign investment in the areas of light industry, light manufacturing, services and commercial investment (for example: auto components, logistics and warehousing, aerospace, apparel and fashion, gems and jewelry, biotechnology and pharmaceuticals, leather, light engineering, sports and toys, electronics and hardware, IT, renewable energy, and other eco-friendly industries) (Project Monitor 2008).

The zone offers:

- 15-year graded Income Tax Holiday

- Exemption from Excise and Customs Duties
- Exemption from Central Sales Tax / VAT
- Exemption from Service Tax
- Exemption from all local taxes
- Single-window clearance
- 100% FDI through the automatic route
- No minimum export performance requirement except that exports must be greater than domestic purchases in foreign currency
- Domestic sales on payment of applicable duty
- Offshore banking unit
- On-site custom house
- Self-certification
- Warehouses/ICD

Companies preparing to establish operations in Sri City include the VRV Group (liquefied gas), Venture Automotive Tooling (automotive components), Intimate Apparels (lingerie manufacturer), Eura D&A (diamond tools), BFG International (composite products), Tablets India (pharmaceuticals), Rockworth Systems Furniture (office furniture), A.S. Cargo (logistics and warehousing).

Integral to the Sri City work-zone is a near-by planned community, which will include residential housing in the form of villas, apartments, dormitories, hostels and housing. The communities will also including shopping, recreational and leisure activities as well as medical facilities. So far, the city is in the early stages of development, with the first two colonies (200 houses each) under construction.

Strategies of Sri City

- Extensive government support under India's Special Economic Zones Policy.
- Significant financial incentives available for investors, such as tax breaks.
- Zone development has been planned in partnership with western consultants.
- Marketing and positioning towards western business.
- Mix of commercial/industry/residential.
- Commitment to environment, "green" image and renewable energy.

4.2.3 Jurong, Singapore

Jurong is located off the South West coast of Singapore island, about 10 km from Singapore City. Before its development, it was uninhabited wilderness. However, the natural geography of the area made it conducive for development. The coastal waters were deep, making it suitable for a port; the land was largely state-owned; landfill sites were readily available; and the site is far enough away from the city to not disturb business or residential areas. The Singaporean government viewed industrialisation of Jurong island as a solution to the country's (then) economic woes.

In 1961, the government allocated 64.8 km² of land in Jurong for industrial development. \$1 billion (Singapore dollars) was allocated for infrastructure, and an Economic and Development Board (EDB) was formed to industrialize the area. In 1962, the foundations were laid for the National Iron and Steel Mills, the first factories in the area. In 1963, 24 factories were established, and in 1965 the Jurong sea port opened. In 1968, infrastructure development (such as factories, buildings, ports, railway, road, electric power, and water) had been almost completed. In June that year, the Jurong Town Corporation (JTC) was created to manage Jurong's and other industry zones' development.

There are many industry types in Jurong Industry Zone: ship-manufacturing, ship-repairing, oil-refining, steel and iron making, cement production, tire-manufacturing, chemical industries, automobile assembling, textiles, cables and food. The deep-water port is near a major international water route. This makes raw material imports and manufactured product exports extremely easy. This has driven the rapid development and success of the zone.

In 2008, the National Development Minister, Mah Bow Tan, announced new plans. Jurong will be developed into a commercial hub, outside Singapore's primary Central Business District (CBD). Jurong Lake District will be similar in size to the major Marina Bay development. 750,000m² of land will be set aside for the project.

The development of Jurong can be divided into three parts:

1. Labor-intensive industries leading phase (1961-1979): in this phase, companies in Jurong were heavily labor-orientated. The aim at this time was to solve the problem of employment in Singapore and change the situation and advance the backwards industry. Through the development of this phase, the economic structure of Singapore had witnessed tremendous improvement. By the late 1970s, unemployment had dropped from 10% in 1965 to 3.3% while the manufacturing sector's contribution to GDP rose from 15% in 1965 to 27%.
2. Technology and capital leading phase (1980-1989): in order to attract technology and capital intensive industries with high added value, JTC launched a 10 year overall plan. This plan showed the characteristic of this phase: designing and providing differentiated facilities and buildings for companies with high growth.
3. Knowledge economy leading phase (1990-present): From 1990s, limited land resources and intense competition drove Jurong's development into a new period. This was characterized by new concepts, such as the Commercial Park, Technology Park and Logistics

Park. To use the land in Jurong efficiently, JTC applied cost-benefit analysis and knowledge economy into Jurong Industry Park's design and development.

The Strategies of Jurong

- Three distinct phases of development, with focus on heavy industry, technology and new concepts respectively.
- Extremely close integration with Singapore's government.
- Strong marketing campaign targeting international firms.
- Mixture of industrial/commercial development.
- Designed to address shortfalls in Singaporean economy.
- Region divided into distinct areas for particular commercial/industry types.

4.2.4 Ruhr, Germany

Germany's Ruhr region and the Caofeidian have some striking similarities—consequently, Ruhr also has many successful experiences for Caofeidian to draw from. Ruhr area is Germany's largest industrial area, with an area of 4430 km² and population of 5.4 million. The Ruhr area is an old industrial zone. Since the mid-19th century, coal mining, steel, chemicals, machinery manufacturing, and other heavy industry have been the core productions of Ruhr. As the result, Ruhr became Germany's energy base, steel base and heavy machine manufacturing base, and occupied 60% of GDP at that time.

After World War II, many traditional heavy industrial areas were decimated, and only the Ruhr area survived in Germany and sustained economic development. At present, the Ruhr district has been formed with both new and old industries, with complex industrial structure, closely linked to the internal layout of the region. We analyzed its development history and

researched its development path. We found the factors of its success are these: first, Ruhr kept up with the trend of economic globalization; second, in the face of reversing process of industrialization and regional recession, the continued use of science and technology; third, improvements with innovative and comprehensive regional planning. Those successful strategies help Ruhr to achieve economic transformation.

The Strategies of Ruhr

- Established authoritative leading agencies. Continued innovative regional development.
- Based on traditional industrial, adjusted regional industrial structure.
- Updated the regional structure, reasonable adjustments to the area production layout
- Strengthened inter-firm linkages and collaborations to ensure the proper allocation of regional resources.
- Improved environmental management and construction and remodeled urban scenery.
- Highly supported by government. Local government provided allowances such as price compensation, tax benefits, investment allowances, retirement allowances and environmental allowances.

4.3 PEST Analysis

A PEST Analysis is used to provide an overall capture of the political, economic, social and technological environments in a country.

India	Germany	United Kingdom	Singapore	China
Political				
Democracy since 1946. Relatively stable since tumultuous period in late 1990s. Problems with corruption and bureaucracy.	Germany government provides several regulations to improve the development of Ruhr (tax incentive, labor allowances).	Stable governance. “Local Government Planning and Land Act” gives companies a lot of powers including the power to acquire and purchase land.	Democracy. High level of efficiency and honesty. Sound legal system. Clear policies and law. Consistent and transparent. It enjoys a remarkably open and corruption-free environment, stable prices.	Very stable Government Close link between Government and Business. Very supportive of new large-scale business development
Economic				
Economic growth exceeded 9%+ p.a. until 2007, 2008 growth of 6.6%. GDP per capita \$US2,800 PPP in 2008. Economic liberalization since 1991. WTO member, commitment to reducing tariffs and subsidies.	Germany is the largest economy in Europe, the fourth largest by nominal GDP in the world, and ranked fifth by GDP (PPP) in 2008. Since the age of industrialisation, the country has been a driver, innovator, and beneficiary of an ever more globalised economy. Germany is the world's top exporter with \$1.133 trillion exported in 2006	With the revolution of technical and science in the 1960s and 1970s, the traditional industries of UK retrogressed. The urban population reduced quickly (about 8% in London from 1971-1981), Unemployment rate is very high (about 17.8% in Docklands). While at the same time, the high-tech, financial and information industry were developing fast.	Singapore is short of natural resources, so its economy is driven by foreign trade, in electronics, petro chemistry, finance, shipping, and services. It is highly dependent on trade with U.S, Japan, Europe and countries nearby. Its total foreign trade is four times of its GDP. Singapore has a highly developed and successful free-market economy. Its GDP is higher than most other	Strong economic growth for 2009 – 7.2% (World Bank). Strength through Global Financial Crisis, large Government stimulus package - RMB¥ 4 trillion. World’s second largest economy (International Monetary Fund 2008). Mixed economy – Socialist / Market combination.

			developed countries. Its economic structure includes five parts: commerce, manufacturing, building, finance, and communication.	
Social				
Hofstede Cultural Analysis: High Power-Distance, High Long Term Orientation, Slightly High Masculinity, Low Uncertainty Avoidance, Average Individualism.	Hofstede Cultural Analysis: Low Power Distance, High Individualism, High Masculinity, High Uncertainty, Low Long-Term Orientation.	The people in Docklands are mostly blue-collar workers and immigrant from other countries such as India, Russia and so on Hofstede Cultural Analysis: Low Power-Distance, Low Long Term Orientation, Slightly High Masculinity, Low Uncertainty Avoidance, High Individualism	Singapore has the population of 4,840,000; most of them are Chinese and the others are Malaysian, Indian, and those from other ethnic. Very High Power Distance, Very Low Individualism, Average Masculinity, Low Uncertainty Avoidance, Low Long-Term Orientation.	Nation-state, ethnically cohesive (Chinese culture). Influence from Confucian values. Hofstede Cultural Analysis: Very high Long-Term Orientation, Very-Low Individualism factor, High Power-Distance Factor, Slightly Low Uncertainty Avoidance
Technological				
Some high-tech industry (space program, etc). Large internet subscriber base. Major IT industry.	Technical of heavy industry and manufacture is developed and play an important role in all over the world	Technical developed fast; high-tech industry emerged and developed fast in those years.	Technology is developed quickly in Singapore. The levels of its electronics, shipping, oil-mining, petro chemistry,	High-tech industry including biotechnology, satellites & space program, weaponry and computing. Some high-tech

			communication, and biology are all very high in the world.	production facilities. World's largest internet subscriber base. Government is keen to support and nurture science and technology.
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Table3: PEST Analysis

4.4 Critical Success Factors

The Critical Success Factors in each zone were observed to help produce recommendations to assist Caofeidian.

4.4.1 Docklands, United Kingdom

First, the unprecedented powers granted by the federal government (including the compulsory power to acquire and purchase land) made it possible for the LDDC to manage the development of the whole area beyond the limitations of local government.

Second, the zone's market-oriented strategy. The central idea used in the development process can be summarized as follows: attracting investment as a "catalyst". That is, the idea that one large investment can attract "chain reaction" investment such as related exploitation investments to drive the area's economics. This idea promoted development of the area by using the market investment in the case of financial difficulties.

Third, the infrastructure constructed in the region. Through the construction of the roads, light railways and airports, transport in the area became more convenient, and better linked

the area to the rest Greater London. These developments improved the investment environments and made Docklands more attractive to investors.

Last, the zone's geographic location close to the centre of London. Although near to central London, the price of land was much cheaper compared to the surroundings. This competitive advantage generated significant investor interest—the location/price combination is a very important success factor that can not be ignored.

4.4.2 Sri City, India

Sri City is in the early stages of development, however there are still success factors from which Caofeidian can learn.

Firstly, Sri City has a very clear positioning and strategy to western and foreign investment. This is evident in both the design of the zone (for example, tariff-free zone for foreign investors, tax concessions, environmental credentials), and the marketing (for example, the website is available in multiple European languages, and marketing features concepts and imagery attractive to Western business). With a clear and direct positioning towards overseas firms, Sri City has already been able to attract investment from France, Italy, Bahrain, Spain, and Hong Kong.

Secondly, in line with this clear positioning to foreign investment, Sri City has instilled a strong sense of environmental awareness. This can be seen as follows: 1) the zone is trying to attract “renewable energy, and other eco-friendly industries”; 2) the zone is built to meet the standards desired by the World Trade Organisation; 3) the area contains sites of natural beauty including waterfalls and; 4) Sri City marketing heavily emphasises the zone's

environmental credentials (for example, the front-page of the e-brochure for prospective developers features an illustration of a large tree and its root system).

Thirdly, Sri City has an enormous population base. 4.5 million people live in near-by Chennai (55km away), and construction of the first eco-city has begun with the first two colonies under construction. This large population base has allowed Sri City to attract commercial and services industries.

Fourthly, Sri City is a Special Economic Zone, and as such, is able to offer the associated financial concessions to potential customers. These benefits include: 15-year graded Income Tax Holiday, Exemption from Excise and Customs Duties, exemption from Central Sales Tax / VAT, exemption from Service Tax, exemption from all local taxes

4.4.3 Jurong, Singapore

First, comprehensive development and planning of the zone. Jurong was positioned as a comprehensive, all-inclusive industry zone. The northeast of the island (close to the downtown area) was designated as a new industry and pollution-free zone, mainly for development of technology-intensive industries. The southwest part (along the coast) was designated as the port and heavy industry zone. The middle part was divided as light industry and general industry zone. Finally, the banks of the Jurong River were designated as the residential district.

Second, excellent infrastructure construction. There are two methods for construction of development zone infrastructure. One is first attracting investment then constructing infrastructure; the other is first constructing infrastructure (according to comprehensive development planning) then using this advantage to attract investment. Jurong used the latter method. From the beginning, the government paid great attention to infrastructure

construction and put a lot of money into this part. Major infrastructure improved the investment environment of Jurong.

Third, the pro-active attraction of foreign investment. EDB was responsible for investment attraction and set up branches around the world. There were three types of EDB customers: strategic corporations (to attract their departments of finance and marketing to the zone), technology innovative corporations (to attract their core products and R&D departments to the zone) and other corporations' important departments (to attract the most complicated operation procedures and the most advanced operation technologies to the zone). Through the introduction of these three types of corporations, Jurong was no longer a low cost producing center, but a long-term base of corporations' strategic operation.

4.4.4 Ruhr, Germany

First, the diversified Industrial portfolio. For a long period of time, coal and steel have always been the two major industries of Ruhr. That situation directly resulted in crisis and recession as the area aged. From the beginning of the 20th century, through the 1960s, with funding from the state, the Ruhr area undertook concentration of enterprises, and the rationalization for the transformation process. After the re-planning of the entire Ruhr coalfield, mechanization lead the coal industry to focus on profit and larger mines, small, unprofitable businesses closed, and a unified arrangement was made. At the same time, the iron and steel industry was also updated, with the closure and consolidation of the old plant.

Second, industrial restructuring strengthened the internal connections, enhancing the business-to-business relationships and collaboration of professionals. At the same time, the layout of the iron and steel industry undertook appropriate adjustments. In order to diversify the economic structure in the Ruhr area, ways were found to improve the investment

environment in the Ruhr area to encourage new industries to move into there. Meanwhile, under the tertiary industry booming, the city built service outlets throughout, and opened up many new tourist attractions for tourism in marginal areas.

These measures have made sure that the economic structure of the Ruhr area has been adjusted, diversified and upgraded. The proportion of coal and steel declined, while other areas increased rapidly, especially the information technology industry has been developed. The Ruhr area, with its well-established, strong foundation in traditional industries and increasing growth of new industries, became a multi-sector integrated development industrial area.

Third, the strong inter-firm linkages and collaborations. The large enterprises and SMEs in Ruhr area have close connections and cooperation. At the beginning, the Coal and Steel Community was formed. Later on, coal, iron and steel became associated, and some enterprises formed contracts or set up joint companies, ensuring stable production and sales. As a short summary, well allocating intra-regional resources is one important critical success factor that has helped Ruhr to sustain its competitive advantage long term.

Last, the development of new features in the regional industry. Ruhr has a detailed plan about how to utilize regional resources to expand its development. Studying from the United Kingdom, Sweden and other countries, Ruhr developed the tourism industry and achieved regional revitalization. After about ten years exploration, the development of industrial tourism became the new fashion of the Ruhr area. From this development model, there are four specific modes:

- Museum development model.
- Recreation, park development model.
- Combination of shopping tourism development model.
- Traditional industrial areas into modern science parks.

4.5 Dimensions

A dimensional analysis of the case studies (and Caofeidian) has been conducted to provide an overview of each zone and allow for easy comparison. The broad dimensions are geography, infrastructure and strategy.

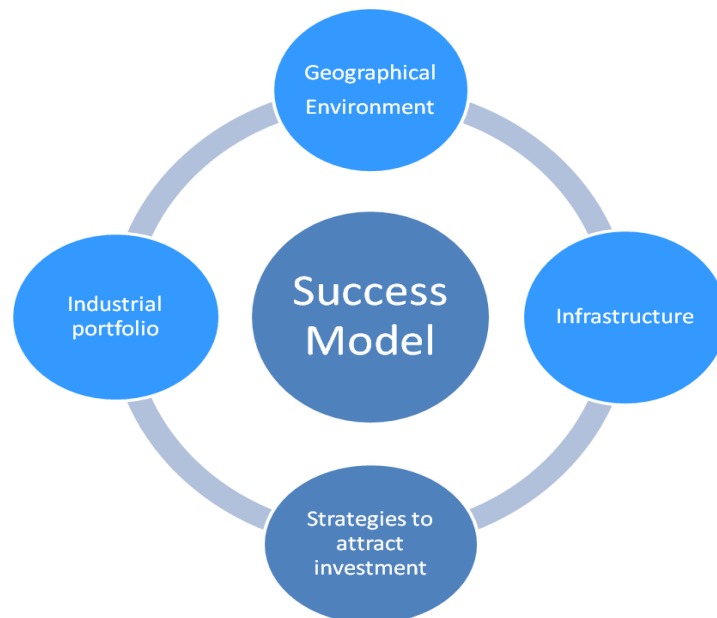


Figure1: Success model with four dimesions

	Jurong	Sri City	Docklands	Ruhr	Caofeidian
Geography Dimension					
Location	Southwest coast of Singapore island, close to the international water way	55km North of Chennai (population 4.3 million), located on Indian Ocean.	Close to the central of London	North Rhine-Westphalia German	Hebei Province, 80km from Tangshan, 220km from Beijing
Resources	Deep coastal water, many hills for landfill	No significant natural resources, as zone is primarily used for light industry and commercial use.	Thames river	Rich coal, Near Ruhr river Near the other most developed industrial zones in European Union.	Abundant natural resources
Infrastructure Dimension					
Transport	Available and conveniently located e.g. Ports, railway, road	70km from Tirupati Airport, close to seaports (Ennore Port, 40km, Krishnapatnam 65km, Chennai Port, 65km), 3 railway stations between 1 and 12km from Sri City, accessible by road.	Very convenient	Very convenient (Rail, road, ports).	Rail, Road, Sea
Power	Yes	Yes, Connected to Andhra Pradesh power-grid.	Abundant	Yes	Yes
Water	Yes	Yes, abundant fresh water, site is also alongside seawater so	Abundant	Yes	Yes, desalination on-site provided by Norwegian

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Group D**

		potential for desalination.			company
Community	On-site, built up	Chennai population base (4.5 million) close-by. Planned Eco-City under construction, to include housing (dormitories, houses, flats, units).	Abundant	Abundant	Planned eco-city
Strategy to Attract Investment					
Financial	Close guidance and financing from central government.	Special Economic Zone (SEZ), Exemption from local, service and central tax/VAT, 15-year tax holiday, domestic tariff zone.	Enterprise zone, cheaper land price	Promote cycling economy Attract new industrial	Low-cost land and labor
Social Responsibility	Some renewable energy.	Described as “green concept” development zone.	Create more job opportunities, enhance the housing condition	Create jobs Environment protection Energy saving Promote living condition	Recycling
Promotion	Major international promotion, pro-active targeting of potential investors.	Website is useful and contains online brochure. Emphasis has been on attracting commercial and light industry.	Active, National	Government in the leading position Hold meetings to improve the cooperation between SMEs and large enterprises	Limited international promotion

5.0 Compared Analysis

5.1 PEST Compared Analysis

Differences exist, so Caofeidian cannot just directly copy the success experience of the cases. Only its overall situation is similar with that of the cases, Caofeidian can learn from them. We compared the external environment of Caofeidian and the selected foreign development zones. According to the PEST analysis we deployed before, we find that:

Caofeidian and the case development zones are all in the countries that have relatively steady political systems. The countries all support a lot for economic development. Caofeidian's and the case development zones' development are all in the period when the countries have fast economic development. Even meeting with economy crisis, the countries would take measure to simulate economy.

The countries that Caofeidian and the case development zones are in all encourage their development of technology and all have high-tech industries. While in social environment aspect, western countries generally are free; China have more policy restrictions. So except social environment, the political, economic, and technological environments of Caofeidian and the case zones are all similar.

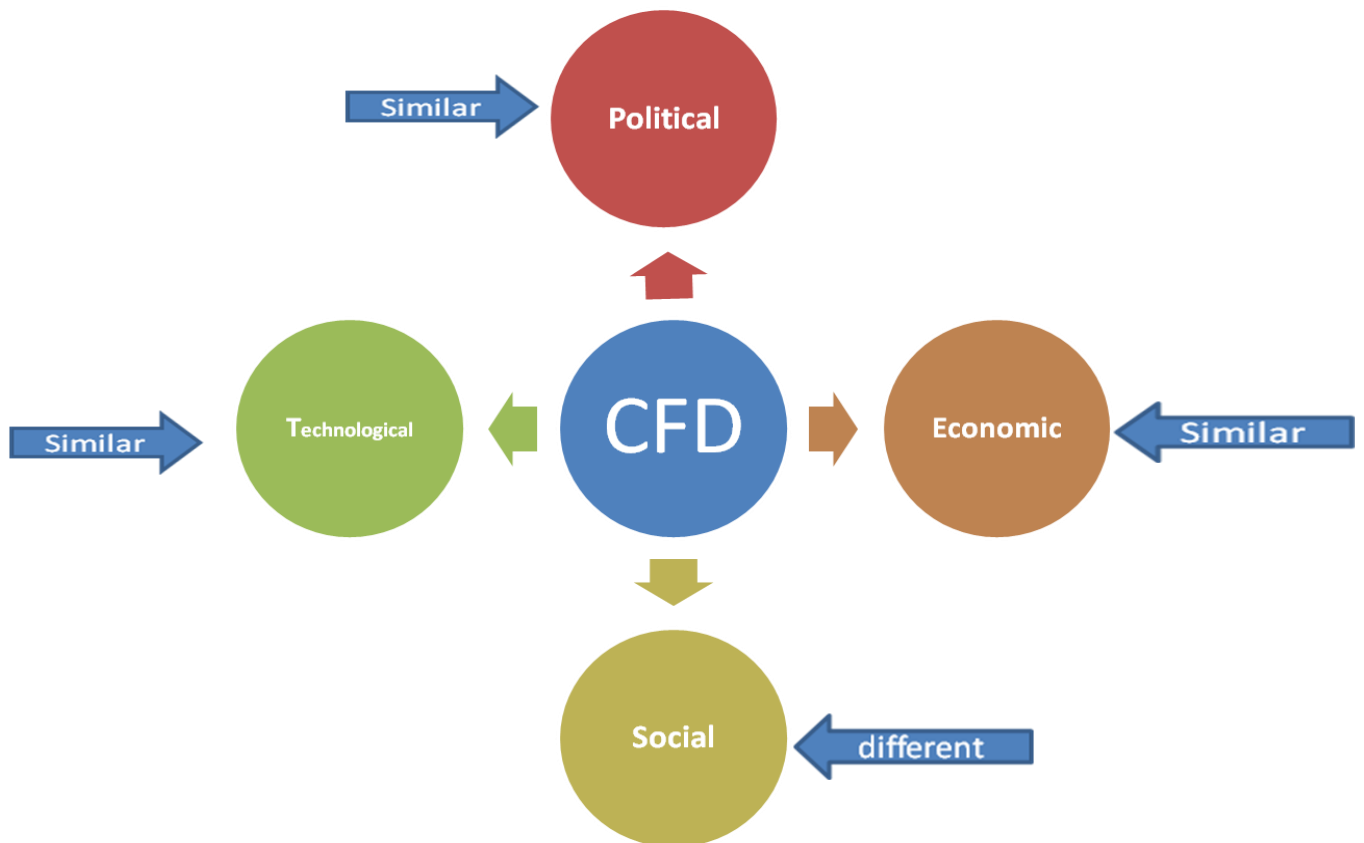


Figure2: PEST Compared Analysis

5.2 Dimension Compared Analysis

Then we relate Caofeidian's specific situations to those of the case zones in four aspects: geographic environment, industry portfolio, infrastructure construction, and strategies of investment attraction:

In the aspect of geographic environment, the case zones are all in the transportation thoroughfare and have rich nature resources, for example, Ruhr has rich coal mine; Caofeidian is in the center of Bohai Bay economy circle where transportation is convenient and Caofeidian also have rich nature resources, especially petroleum and salt.

In the aspect of industry portfolio, the case zones have proper and balanced industry portfolio; currently, Caofeidian mainly develop heavy industries, but also plan to a more comprehensive development.

In the aspect of infrastructure construction, the case zones have convenient transportation and excellent power, water, housing, and supporting facility systems; Caofeidian owns integrated transportation system and excellent water system, but power, housing, and supporting facility are all in construction.

In the aspect of strategies of investment attraction, governments of the case zones all provide financial support for their development, such as tax break; development of the zones ease the pressure of local employ; the zones actively take measures for promotion, such as setting branches and websites. The bonded area of Caofeidian is in planning; Caofeidian initiate recycling economy and that supports China's sustained development strategy; Caofeidian needs to adopt more promotion activities to attract investment.

From the analysis, we find Caofeidian has good natural and geographic conditions, but need to adjust its industry portfolio, strengthen its infrastructure construction, and improve its strategies of investment attraction.

		Foreign Development Zones	Caofeidian
Geographic Environment	Location	In transportation hub	Centre of Bohai Bay Economical Circle
	Natural Resources	Abundant	Abundant petroleum and salt resource
Industry Portfolio	Industry Portfolio	Proper balanced industry portfolio	Mainly develop heavy industry
Infrastructure construction	Transportation	Convenient (road, railway, port, airport)	Integrated transportation system
	Power	Excellent	First stage construction has been completed
	Water	Excellent	Excellent
	Housing	Excellent	Still in construction
	Supporting facility	Excellent (except Sri)	Still in construction
Investment Attraction Strategy	Financial support	Tax break	Bonded area is on agenda
	Social responsibility	Solve unemployment problems, recycling economy	recycling economy, sustained development
	Promotion activity	Positive (website, ads...)	Still need to be improved

Table4: Dimension Compared Analysis

6.0 Recommendations

We make the four following recommendations:

- 1. Caofeidian should position itself to attract both domestic AND international investment – with suitable strategy, planning and marketing for both.
- 2. Caofeidian should accelerate infrastructure construction to improve the investment environment.
- 3. Caofeidian should be aware of the limitations of non-renewable resources, and must investigate alternative industries as well.
- 4. Caofeidian should introduce a clear marketing strategy about the type of corporations it wants to attract, and market appropriately.

Each recommendation is presented in more detail below:

1. Caofeidian should position itself to attract both domestic AND international investment – with suitable strategy, planning and marketing for both.

In our interviews and research we found some vagueness and uncertainty about Caofeidian’s strategy and positioning. For example, there was not a clear answer to the question: “Is Caofeidian hoping to attract Chinese or Foreign investment?”

At the moment, Caofeidian is doing a very good job at attracting Chinese investment, however international investment is viewed as a secondary “after-thought”—this can be seen in the limited foreign number of foreign companies that have invested. We believe that if Caofeidian can develop a parallel strategy to attract foreign investment, the zone will be able to significantly expand its foreign company portfolio. From a western perspective, there is an opportunity for Caofeidian to strengthen its strategy and positioning to better match the requirements of western business.

The Sri City case study is useful in educating Caofeidian on the benefits of a clear strategy and direction. Sri City SEZ, India, has a clear strategy and positioning: it is positioned to attract primarily foreign investment at a commercial and light industry level. With this clear positioning (and the clear marketing strategy that has followed) Sri City has been able to attract investment from China, Spain, Bahrain, France, Italy, etc. We perceive that Caofeidian can view this example and learn how attract more international development.

Sri City has employed a number of approaches to ensure it is highly attractive to international investment – these are potential strategies for Caofeidian.

- The zone was developed in partnership with investment partners, consultants, and promoters from the United States and Singapore. This meant that throughout the design stage the zone was planned to be conducive to western investment. Some further consultation and promotion from western companies may be beneficial (of course retaining Chinese ownership).
- As a Special Economic Zone, the Sri City zone provides economic concessions for foreign companies (for e.g. tariff free zone for international companies).
- Sri City’s marketing has been designed with an international focus. For example, literature is available in English/French/German, and advertising makes references to terms such as “world-class” and “international”. Advertising features imagery familiar to western business.

We recommend that Caofeidian positions itself separately to both domestic *and* international investment (rather than “everyone”)—with suitable, separate strategies for both. Specifically for the Western positioning it may be worth hiring an Intellectual Property rights officer, a

Corporate Social Responsibility Program, establishing a marketing department, and improving environmental credentials (for example, building some small wind or solar power). It is essential for Caofeidian to unveil a suitable marketing strategy for both positionings (please see next recommendation for information on marketing strategy). The next recommendation will explore possible improved marketing strategy for Caofeidian.

2. Caofeidian should accelerate infrastructure construction to improve the investment environment.

Infrastructure construction at Caofeidian includes services for resident's daily life and activities—the public services in place to ensure normal social and economic activities and ensure stability and long-term economic development. The main components of infrastructure include: housing, office building, electrical power (such as petroleum, natural gas, electricity), traffic (including road, rail, aviation), environmental and water projects and telecommunication.

Rapid infrastructure construction was one of the critical success factors at Docklands. Caofeidian, where the land is mostly re-claimed from the ocean, has made some progress in the areas of electricity, water, traffic and telecommunication. However, the findings from our residential interview suggest that infrastructure construction still needs improvement to match the rapid development of Docklands. Currently, community and commercial construction is limited. It is recommended that Caofeidian accelerate infrastructure construction to avoid negatively effecting the attraction of the area to potential investors.

Comprehensive infrastructure construction at Caofeidian could lead to cash-flow problems (due to the large size of the area and development required). Caofeidian can refer to the

policies used in the Docklands example to achieve the best value for money in infrastructure development. Please refer to the following suggestions:

1. Rolling development: Under financial strain, Docklands deployed infrastructure construction at optimal areas to improve the investment environment. Surrounding areas were then developed in turn as the initial areas matured. Caofeidian can alleviate the economic pressures of infrastructure construction by following this model.

2. Cooperate with individuals to construct infrastructure: Co-operating with individual to use individual investments to develop the infrastructure was another policy that Docklands used to alleviate its economic pressures.

3. Caofeidian should be aware of the limitations of non-renewable resources, and must investigate alternative industries as well.

Caofeidian should search for new growth areas in alternative industries, and prepare conditions for future economic restructuring. With Caofeidian as a resource orientated industrial zone, the potential threat is that many resources cannot renewable. For example, land could not be expanded, mountains can be heightened, the coast can not be renewed, and coal and steel can not be re-born. It is a serious problem for Caofeidian to consider—sustaining competitive advantage without relying on rich nature resources.

Moreover, the Caofeidian may face similar volatilities to those faced by Ruhr, for example the price of oil. Caofeidian should be fully aware of this. The zone must on one hand, focus on current economic development (through the use of the most abundant resources); but on the other, it must search for a future growth point.

Caofeidian must adjust and enrich the industrial structure. Over the years, the energy, and manufacturing sectors have always been the two major pillars of economic development for Caofeidian. Therefore, the zone must strengthen the industrial structure based on iron and steel and other resources.

Caofeidian should improve other related facilities, such as accommodations, shopping centers and recreation. The development level of other relative facilities is very important for Caofeidian since it decides the scope of Caofeidian's future development. If the basic accommodation is poor, it is difficult to keep people staying there. After the research about Ruhr, it appears that people are the basis to fast develop a zone. Other relative facilities will be the necessary infrastructure to sustain the people.

4. Caofeidian should introduce a clear marketing strategy about the type of corporations it wants to attract, and market appropriately.

Caofeidian has to have a clear marketing strategy, and a clear knowledge of the types of companies it wants to attract. For example: heavy or light industry companies, labor-intensive or technology-intensive, domestic or foreign. Caofeidian needs to know which types of companies it wants to attract, just as Jurong did (refer to critical success factor 3 in the Jurong case). Caofeidian must put in place a plan of the investment attraction activities it wishes to undertake. These activities may include: holding meetings domestically or abroad to explain the investment environment, holding investment attraction meetings/seminars in target regions and countries, establishing communication channels with banks, multinational companies and chambers of commerce, setting up branches in target regions and countries (as Jurong did), and learning from professional consultants how best to attract investment. The

key for Caofeidian's marketing strategy must be two-fold: to make known the advantages of the zone to target companies, and to streamline communication between Caofeidian and clients.

7.0 Action Plan

To benefit from these recommendations, it is suggested Caofeidian follow this short-term action plan:

- Through careful analysis of strengths and weaknesses, decide which type of companies to target and concentrate on (recommendation 4).
- Develop clear, split positionings towards both domestic and foreign markets, with appropriate and separate marketing strategies for each positioning. It may be beneficial to seek further consultation from western firms to assist with marketing towards foreign companies (1 & 4)
- Determine alternative industries that may (in future) be able to supplement the heavy-industry and labor-intensive industries which currently form the basis of Caofeidian (3).
- Examine future infrastructure projects and determine which projects can be fast-tracked to accelerate development of the region (2).

8.0 Summary

To best assist Caofeidian, we conducted an analysis of the zone to find areas where Caofeidian can benefit most by following the examples of foreign zones. It was concluded that Caofeidian has opportunities to improve in areas such as marketing, diversification and infrastructure construction.

To address these areas for improvement, four foreign development zones were studied, with an emphasis on their handling of these areas. The four zones studied were: Docklands, Sri City, Ruhr and Jurong. These zones were examined in three dimensions, and their host country's examined in a PEST analysis to give context. Next, the critical success factors were identified.

These critical success factors were then evaluated in the context of Caofeidian, and presented as recommendations. The four key recommendations identified were as follows: first, Caofeidian should position itself to attract both domestic AND international investment – with suitable strategy, planning and marketing for both; second, Caofeidian should accelerate infrastructure construction to improve the investment environment; third, Caofeidian should be aware of the limitations of non-renewable resources, and must investigate alternative industries as well, and finally; Caofeidian should introduce a clear marketing strategy about the type of corporations it wants to attract, and market appropriately.

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Additional information gained through on-site tours and interviews at Caofeidian Development Zone and through consultation and discussion with peers.



国外开发区模式研究

项目报告

IS6930 / IBUS7314

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摘要

本报告主要通过对国外开发区模式的研究，为曹妃甸的研究人员提供有关国外开发区的相关资料，使其能够对国外开发区有更加深刻的了解；同时为曹妃甸的未来发展寻找机遇与对策，并提出了相应的建议。

我们通过对曹妃甸工作人员实地访谈，以及运用 PEST 以及 SWOT 模型对曹妃甸的目前状况进行了研究，发现了其目前的优势与劣势。曹妃甸的主要优势包括：优良的地理位置、丰富的自然资源、低廉的土地成本、以及它的循环经济模式等；而其的仍需加强的方面主要包括：基础设施建设（相对快速发展的经济建设稍有落后）、区域的市场营销（定位还不够明确、政策还不够积极有效）、产业规划（应有更加全面平衡的产业规划），开发区相应的法规政策（需更加明确）。

接下来我们对所选的四个案例（新加坡裕廊开发区、德国鲁尔区、伦敦多克兰城市开发区和印度斯里经济开发区）进行的全面的分析，了解了它们的开发区模式。接着运用关键成功因素的方法总结了各个开发区的成功经验，并在此基础上再次进行分析总结，提出了开发区成功的四个关键因素，即一个成功的开发区它离不开优越的地理环境、科学合理的产业结构、完善的基础设施建设以及积极有效的招商政策。

为了更好的结合曹妃甸的实际情况，我们将曹妃甸与国外开发区从 PEST（政治、经济、社会以、技术）以及我们总结出的四个关键因素等方面进行了对比分析；进而借鉴国外开发区的成功经验为其未来的发展提出了意见。

1. 项目目标

本项目的目标包括：

- 1) 介绍国外开发区案例，并对其进行分析。
- 2) 通过实地访问调查，全面分析曹妃甸的现状。
- 3) 通过对比分析，借鉴国外开发区的成功经验，为曹妃甸的未来发展提出相应的建议。
- 4) 为曹妃甸相关研究人员未来在该方面的更深层次的研究提供资料。

本报告的结构主要为：

文献综述：该部分主要介绍了开发区的定义以及本项目的研究背景。

曹妃甸总体分析：该部分全面的介绍了曹妃甸的现状，并且运用了 SWOT 模型对其进行了分析，在了解外部带给它的机遇和挑战的同时，找出了它的竞争优势与劣势。

案例分析：该部分从不同方面对所选四个案例进行了全面深入的分析，总结了它们各自的成功经验，并从中提炼出四个维度。

对比分析：该部分首先运用 PEST 模型分析了曹妃甸和外国开发区外部环境的异同，又从之前提炼的四个维度入手，对比分析了曹妃甸和外国开发区自身条件方面的差异。

建议：该部分在对比分析得基础上，结合曹妃甸的实际情况，为曹妃甸的未来发展提出了相应的建议。

2. 文献综述

在文献叙述里，很难发现对于“开发区”一词的准确定义。相反，“开发区”这一词有着更广泛的使用，例如对于工业园区，自由贸易区（FTZs），出口加工区（EPZs），特别经济区（SEZs）和经济技术开发区（ETDZs）等我们都可以称之为开发区。在下面的综述中，我们将简单的介绍不同特征的开发区来对曹妃甸进行更准确地定位。

1) 工业园区 —— 特别面向工业发展的区域

工业园区的概念首先在 1896 英国曼彻斯特工业园区里被提出（World Bank 1991）。在 20 世纪 50 年代，欧洲首先建立了自由贸易港区，自由贸易港区则被界定为“区以外的国内经济的自由贸易区”，这些自由贸易港区主要是些位于机场和海港的小面积区域。在 20 世纪 60 年代工业园区和自由贸易港区合并，在印度和台湾建立了世界上第一个专门的出口加工区。O’ Sullivan 和 Sheffri 将出口加工区界定为：“将国家的一些正常的贸易障碍（例如关税和配额）取消的特别的地区，用以吸引外国投资，促进商业发展（2002 年）。

2) 经济特区——在现代的定义中，是更加完善的出口加工区。

在中国，印度和巴基斯坦等建立的经济特区的特点由 Ge 在 1990 年提出：“在一个地理区域内，国家为促进某些经济活动所提倡的一系列政策措施，一般不适用于该国其他地区”。印度政府对于本国经济特区的政策描述了该区是作为“免税地区，以吸引外资为目的进行贸易业务（2000 年进出口政策，引用斯里兰卡市网站）”。开发区这一名称也被用来指经济技术开发区，并于 1984 年首次在中国成立（Ma, 2004）。经济技术开发区是以发展高新技术产业为主，面向重点工业项目，来吸收外资并建立外向型经济的地区（Linhe 2005）。

对于如何在一个地区吸引投资，尤其是外国投资（重点放在经济特区），Glaister 与 Taoglu（1998）的研究发现：市场潜力，政府规章和奖励，投资风险，相对投资优势，战略区位优势，和劳动力的供应和基础设施这六个关键的决定性因素。但是，相对于其他决定性因素对于投资地点的选择程度，财政奖励有着“相对较小”的影响力（Batchler and Clement 1990）。在 2003 年，Carson 确定了推动投资者决定投资地点的主要选择依据，具体如下：当地本国市场的规模和经济增长情况；政府对于外国直接投资的财政奖励；经济政策；文化差异；运输成本；材料和劳动力；资源技术；政治稳定程度和配套基础设施水平。此外，国家和公司的承诺，企业的社会责任也日益成为重要的影响投资意向的因素（Goyal 2006）。

3. 曹妃甸

3.1 曹妃甸开发区概况

曹妃甸位于唐山南部沿海、渤海湾中心地带，原本是一个东北、西南走向的带状沙岛，为古滦河入海冲积而成，至今已有 5000 多年的历史，因岛上曾建有唐朝皇帝李世民一曹姓妃子的庙宇而得名。

应国家能源、交通发展战略，为调整我国北方地区重化工业生产布局和产业结构，加快推进环渤海地区经济一体化发展和引领现代工业走循环经济之路，1992 年中国政府做出了开发建设曹妃甸的重大决策。经过缜密的规划，曹妃甸工业区管理委员会于 2005 年 10 月 8 日正式成立。

按照中国政府批准的曹妃甸产业发展规划，这里将建成：

- 1) 中国能源、矿石等大宗货物的集疏港；
- 2) 中国新型工业化基地；
- 3) 中国商业性能源储备基地；
- 4) 以及中国循环经济示范区。

曹妃甸建设总体目标是：按照高起点、高质量、高水平和技术一流、规模一流、效益一流、生态一流的要求，将曹妃甸逐步建成依托京津冀，服务环渤海，面向世界的国家级临港产业循环经济示范区。

曹妃甸计划发展以现代港口物流、精品钢材、化工和装备制造四大产业为主导；电力、海水淡化、建材、环保等关联产业循环配套；信息、金融、商贸、旅游、社会化服务等现代服务业等协调发展的循环经济型产业体系。

为实现港口、港区、港城协调发展，打造唐山“双核”城市群体系，在曹妃甸新区东部，京唐港区和曹妃甸港区之间，正在规划建设总面积 150 平方公里、人口规模 100 万的曹妃甸国际生态城。滨海新城是曹妃甸和几家瑞典公司的合作项目，建设始于 2009 年，预计一期工程将于 2012 年完成。

到目前为止，首钢、中国石化等一些国内大型企业已经入驻曹妃甸，日本的 Sojitz 公司和挪威的 Aker Kvaerne 公司等一些国外资本也已被引入。现在，有 10 万名建设者奋战在曹妃甸，曹妃甸以每天投入 2500 万美元的速度正在被大规模的开发建设，这里可以说是目前世界上最大的建设工地。

3.2 曹妃甸 SWOT 分析

为了明确自身优劣势及外部环境给其发展带来的机遇和挑战，我们对曹妃甸进行了 SWOT 分析，分析结果如下表 1 所示：

优势 (Strength)	弱势 (Weakness)
<ul style="list-style-type: none">✓ 交通便利发达✓ 海陆一体化交通运输系统✓ 丰富的自然资源✓ 较低的土地价格✓ 先进的理念(循环经济体系)	<ul style="list-style-type: none">✓ 与成熟发展区相比，基础建设仍需完善（例如配套住宅区）✓ 配套的法律法规（知识产权保护，合同保护条例等）✓ 配套绿化
机遇 (Opportunity)	威胁 (Threat)
<ul style="list-style-type: none">✓ 亚洲新兴市场的崛起✓ 经济危机后的经济蓬勃期✓ 中国市场的发展潜力	<ul style="list-style-type: none">✓ 现时的经济危机✓ 现时的竞争者✓ 潜在的竞争者

表 1：曹妃甸 SWOT 分析

3.2.1 优势

交通：曹妃甸交通便利发达，有海陆一体化交通运输系统，高速公路、铁路和港口一应俱全；

地理位置：曹妃甸位于环渤海经济中心，距唐山仅 80 公里，距北京 220 公里；

自然资源：曹妃甸拥有丰富的石油、海盐等自然资源。海水淡化技术的进步也为区内企业的生产制造提供了丰富的淡水；

价格成本：曹妃甸土地和港口价格较低，成为其吸引投资的一项促因；

先进的理念：曹妃甸的发展引入循环经济这样一个先进的概念，有力吸引企业投资；计划中的滨海新城一旦建好将吸引大量人口入住，为曹妃甸的发展添砖加瓦，同时带动区内服务商贸业的发展。

3.2.2 劣势

基础建设：与其快速的发展速度相比，曹妃甸的基础设施建设还稍显滞后，例如配套厂房和住宅区的建设；

法律法规：曹妃甸尚无知识产权法专业人员，合同保护条例的制定上仍有不甚明确的地方，因此在改进区内法律法规方面仍有较大空间；

配套绿化建设：曹妃甸倡导循环经济理念，但目前区内配套绿化设施建设还有待改善。

3.2.3 机遇

亚洲新兴市场的崛起：中国的一些邻国（例如：越南、柬埔寨等）经济开始发展，这些国家的发展可能会为曹妃甸带来新的客户；

世界经济动向：经济危机后一般会出现一段经济蓬勃发展的时期，这段时期会为曹妃甸的发展带来新的希望和契机；

中国市场的发展潜力：尽管世界经济危机仍在持续，但中国经济仍保持上升趋势（世界银行预计 2009 年中国经济的增长率为 7.2%）。中国坚实的经济基础为曹妃甸的发展提供了强大后盾。

3.2.4 威胁

现时的经济危机：经济危机并未过去，世界经济的发展还存在不确定性，它对曹妃甸的影响同样难以预测；

现时的竞争者：国内外已存在大量的经济开发区，现时的竞争已经相当激烈；

潜在的竞争者：从前欠发达的国家和地区正在逐步发展（如前面提到的越南等国家），这些国家经济开发区会提供更廉价的土地、港口，对曹妃甸的发展带来了潜在威胁。

4. 案例分析

4.1 简介

这部分我们将对精选的四个案例进行分析，这四个案例包括：裕廊工业开发区（新加坡）、鲁尔工业区（德国）、多克兰工业区（英国）和斯里开发区（印度）。以下是我们选择这四个工业区作为案例的原因（参考表 2）：

裕廊：首先，裕廊工业区的发展极大地促进了新加坡经济的腾飞（新加坡被誉为“亚洲四小龙”之一）；其次，裕廊的自然地理条件与曹妃甸类似，它最初的核心产业也和曹妃甸一样为重工业；最后，裕廊开发区的管理模式也和曹妃甸一样属于政府主导。曹妃甸可以从裕廊的案例中获得多方面的启发。

鲁尔区：在德国经济、社会和技术环境面临重大结构性变革的时期，鲁尔区起到了先锋作用。选择鲁尔作为案例的主要原因在于其在困难时期通过产业结构调整依然能存活下来的经历是我们借鉴的宝贵经验。此外，鲁尔有与曹妃甸类似的竞争优势，即便利的交通和丰富的自然资源。

多克兰：首先，这是外国开发区发展的一个成功案例，代表了欧洲国家开发区的发展；其次，多克兰的开发周期已经完成，我们可以从始至终地追溯它的发展历史；最后，这是一个综合性的开发区，涵盖工业、商业和社区发展，因此该区的发展经验对同样希望发展综合性产业结构的曹妃甸开发区来说是很有价值的。

斯里市：首先，斯里市所处的国家-印度同中国一样也是“金砖四国”（巴西、俄罗斯、中国和印度）之一，这两个国家都有辽阔的地域、稠密的

人口以及快速发展的经济；其次，与曹妃甸的滨海新城类似，斯里市也计划建成一座城市；最后，曹妃甸可以向斯里市学习如何吸引外国投资。

选择依据			
新加坡裕廊开发区	德国鲁尔开发区	伦敦多克兰开发区	印度斯里经济特区
自然地理条件类似	发展重工业为主	基础设施建设方面经验，可被借鉴	“金砖四国”之一，大环境相似
开发区管理模式类似	丰富的自然资源	开发完成，可对其整个过程进行研究	吸引国际投资方面的经验值得借鉴
产业结构类型类似	经历产业革命，仍保持较高竞争力		
成功的临港工业开发区			

表 2：案例选择依据

4.2 案例介绍

在这一部分中，我们将对四个案例的大致情况进行介绍。

4.2.1 新加坡裕廊开发区

裕廊位于新加坡岛西南岸，距新加坡市中心约 10 公里。在未被开发之前，这里是一片荒芜的无人地带，然而这里的自然地理条件使得这里便于开发：沿岸深水使得这里适合建造深水港；土地大部分是国有的，便于填海造地；这里还远离城区，因而建设过程不会影响到商业区和居住区。新加坡政府认为裕廊岛的工业化将有助于本国的经济建设。

1961 年，政府在裕廊划拨出 64.8 平方公里的土地用于工业发展，拨款 10 亿新元用于基础设施建设，同年，经济发展局成立。1962 年，国家钢铁厂，区

内的第一家工厂建成。1963 年区内已建有 24 家工厂。1965 年，裕廊港开通。到 1968 年，区内的基础设施（厂房、码头、公路、铁路、电力和水力等）已基本完工。同年 6 月裕廊镇管理局成立，专门负责经营管理裕廊工业区和全国其它各工业区。

裕廊工业区涵盖了造船、修船、炼油、钢铁制造、水泥生产、轮胎制造、化工、汽车装配、纺织、电缆和食品等工业类型。这里的深水港靠近主要国际行道，使得原材料进口和制成品出口十分方便。这有力地推动了裕廊工业区的快速发展。

2008 年，新加坡政府制定出新计划：裕廊将被开发成一个在新加坡中心商业区以外的新型商业枢纽区。政府将会拨出 750000 平方米的土地进行这项工程。

总的说来，裕廊区的发展经历了以下三个阶段：

1) 劳动密集型产业主导阶段(1961-1979 年)：此阶段的入区企业以劳动密集型产业为主，主要是为了解决新加坡就业问题，改变其工业落后的面貌。经过这一阶段的发展，新加坡的经济结构发生了巨大的转变，到 70 年代末，新加坡失业率从 1965 年的 10%下降到 3.3%；制造业占 GDP 的比重由 1965 年的 15% 上升到 27%。

2) 技术与资本主导阶段(1980-1989 年)：为了吸引高附加值的资本与技术密集型产业，JTC 启动了 10 年的总体规划(1980-1990 年)，此项规划体现了这个阶段的服务特点，即为高增长型的企业设计和提供具有差异化的设施和厂房，包括将南部的岛屿开发区开发成石油化工产品的生产和配售中心，将罗央开发成第一个航空工业中心以及建设新加坡科技园区以容纳科技开发型企业。

3) 知识经济主导阶段(1990 年以来)：从 20 世纪 90 年代开始，有限的土地资源和激烈的竞争将工业园区的发展推进到一个新的时期。出现了商业园、

技术园、后勤园等新概念的园区。为了提高集约化利用园区的土地，JTC 将成本效益分析和知识经济融合到工业园区的设计和发展之中。

裕廊区开发区的总体战略是：

- 目标为推动新加坡经济发展
- 政府主导规划，企业具体管理
- 划分为三个阶段发展，在这三个阶段中分别重点发展重工业、高新技术产业和新概念园区
- 多种类型产业综合全面发展
- 在岛内分区发展不同类型的产业
- 强有力的推广，吸引国际企业投资

4. 2. 2 德国鲁尔开发区

德国的鲁尔地区与曹妃甸有着惊人的相似之处，也确实有着许多可供曹妃甸借鉴的成功经验。鲁尔工业区是德国，也是世界重要的工业区。位于德国西部、莱茵河下游支流鲁尔河与利珀河之间的地区。其面积约有 4593 平方公里，占全国面积的 1.3%。鲁尔区南部的鲁尔河与埃姆舍河之间的地区，工厂、住宅和交通网交织在一起，形成连片的城市带。传统上鲁尔区从 19 世纪中叶开始，一直以采煤、钢铁、化学、机械制造等重工业为核心，是德国的能源基地、钢铁基地和重型机械制造基地，这三大部门的产值曾一度占全区总产值的 60%。二战后，在新一轮产业革命浪潮的冲击下，世界其它一些以重化工业为主的传统工业区，纷纷陷入严重衰弱和危机之中，唯有鲁尔区仍保持较强的生命力，经济持续发展。

鲁尔区的工业是德国发动两次世界大战的物质基础，战后又在西德经济恢复和经济起飞中发挥过重大作用。现在仍在德国经济中具有举足轻重的地位。

鲁尔工业区突出的特点是，以采煤、钢铁、化学、机械制造等重工业为核心，形成部门结构复杂、内部联系密切、高度集中的地区工业综合体。鲁尔的成功经验主要是是：紧跟经济全球化趋势，审时度势，面对逆工业化过程和区域衰退，利用科学技术革命，不断创新，全面进行区域整治和更新，成功实现经济的战略转型。

鲁尔开发区的总体战略是：

- 成立权威领导机构，区域发展规划不断创新
- 以传统工业为基础，充实、调整区域产业结构
- 不断更新区域结构，合理调整区内生产力布局
- 加强企业间的联系和协作，以确保合理分配区域资源
- 开发工业传统资源，拓展区域产业新功能
- 发挥政府的主导作用，协调各级政府共同参与对鲁尔区的建设并对其提供了大量的补贴，如：价格补偿、税务优惠、投资津贴、员工补贴、环保资助和研究与发展补助等

4. 2. 3 伦敦多克兰开发区

1981年设立的位于大伦敦市东部，泰晤士河两岸的“码头开发区”一道克兰开发区，可谓是上世纪末西方最大的城市开发工程。从1981年开发区设立，直至1998年完成开发，道克兰成功的从以往破旧，衰败的地区打造成了以商业为主，又有一定工业的综合区域。它不仅在规模上名列全英第一，而且其在开发过程中遇到的种种问题与矛盾，让它成为发达国家开发区运行过程中集各种矛盾于一身的缩影。本节试图通过对它整个开发过程中的发展思想，总体战略，以及它在开发过程中遭遇的一些问题和解决方案进行一定得研究，为曹妃甸开发区对国外开发区的理论研究提供资料以及一些新的理念。

	1981 年	1998 年
人口 (万人)	3.9	8.4
工作岗位 (万个)	2.7	8.4
住房 (万套)	1.5	3.6
私有住房比率	5	44
公司数量	1014	2600
城内居民工作人数	5200	10500

表 3: 多克兰一些基本指标的变化

地理位置: 英国伦敦的“码头开发区”位于大伦敦是东部的泰晤士河两岸, 它西起著名的伦敦塔桥 (该地为伦敦中心区, 即老金融区), 向东沿泰晤士河延伸 10.8 公里直至皇家码头, 南北最宽处 2 英里。整个开发区陆域面积达 2200 平方公里, 水域面积 162 平方公里, 滨水岸线长 88.5 公里, 分属于当时伦敦最衰落的三个区: 哈姆莱特塔区—Tower Hamlets (562 平方公里)、索斯威克区—Southwark (214 平方公里) 以及纽汉姆区—Newham (1126 平方公里)。开发区大部分位于泰晤士河北岸, 包括维平—Wapping、莱姆霍斯—Limehouse、狗岛—The Isle of Dogs 和皇家码头—The Royal Docks, 而萨里码头—Surrey Docks 和伯蒙德斯—Bermondsey 则位于泰晤士河北岸; 该区的核心部分为狗岛, 它与著名的格林威治区隔阂相望, 也是现在伦敦新金融中心的所在地。

开发区成立: 1981 年英国政府成立了多克兰城市开发区, 并于同年的 6 月成立了伦敦道克兰城市开发公司 (London Docklands Development Corporation, LDDC) 负责对该地区的开发。从此, 直到 1998 年道克兰开发区解散, 道克兰城市开发公司对该地区进行了为期 17 年的开发。该开发区在成立之时将其目标定位为“有效地利用土地和和建筑物, 鼓励工商业发展, 创建一

个更具系英里的环境，提供优质的住房和社会服务设施，以鼓励人们在此居住”。

多克兰开发区的总体战略是：

- 通过对基础设施的建设，迅速改善道克兰地区的形象面貌以吸引投资
- 用有限的发展基金进行投资，行成有力的经济杠杆，来吸引私人的投资
- 在资金允许的前提下，尽可能多的购买土地，以市场为导向，以土地开发带动整个开发区的发展
- 改善该地区的道路，以及公共交通条件，使其与伦敦的其它地区有同等的水平
- 通过引导市场投资来刺激市场需求，改善社区的设施
- 积极营销，开拓市场
- 重点开发，逐步升级（即选择地势好的地块先开发，成熟之后再向周边辐射，发展其他地块）

4. 2. 4 印度斯里经济特区

斯里经济特区于 2008 年开始建设，位于钦奈港北部约 55 公里处。这里是由专家规划和新加坡裕廊开发区顾问设计的，是印度最大的多用途经济特区，由 APIIC 和 IALA 共同管理。斯里特区的定位是在印度以及全球吸引投资，打造以商业和轻工业为主的经济特区（主要行业类型可包括：汽车配件、物流仓储、航空、时装、珠宝、生物科技和制药、皮革、轻型机械、运动产品和玩具、电子、信息技术、再生能源和其他生态友好型产业）。

准备在入驻斯里特区的企业包括：VRV 集团（液化气）、Venture 汽车加工（汽车配件）、Intimate 服装（女士内衣）、Eura D&A（钻石工具）、BFG 国

际（合成产品）、印度 Tablets（制药）、Rockworth 组合家具（办公家具）和 AS 货物（物流仓储）。

在斯里市办公区附近规划建设一个配套社区，社区中包括别墅、公寓、宿舍和酒店等多种形式的住宅组合，同时也涵盖购物、休闲和医疗设施。到目前为止，斯里市还处于开发初期，前两个建筑群（每个建筑群包括 200 栋建筑）正在建设之中。

斯里特区的总体战略是：

- 依照印度经济特区政策，政府大力支持
- 为吸引投资积极采取财政刺激措施，例如税制优惠
- 外国顾问参与特区发展规划设计
- 定位和营销偏向西方企业
- 工业、商业和住宅区共同发展
- 承担环保责任，提倡“绿色”概念

4.3 案例 PEST 分析

在这部分中，我们利用 PEST 模型对以上四个案例开发区的外部环境进行了分析总结，如下表 4 所示：

新加坡	德国	英国	印度
政治			
政治民主，政府以高效率和诚信著称，法律系统完善	政局稳定，政治民主，法律系统完善	政局稳定，“当地政府规划和土地法案”授予企业更多的权利，包括获得和购买土地	1946 年开始实行民主制度，经过 19 世纪 90 年代的骚乱期后目前政治相对稳定
经济			
国内自然资源贫	欧洲最大的经济	老牌工业国家，科	1991 年开始经济自

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乏，经济由外贸和服务产业驱动，市场自由、高度发达	体，2008年GDP世界排名第五，从工业时期起就是世界经济的驱动力量和创新者	技革命以来经济出现倒退，但高新技术、金融和信息产业发展迅速	由化，近年经济增长迅速，为WTO成员国之一
社会			
人口大部分为华裔，社会自由开放，权力距离高，个人主义弱	社会自由开放，权力距离小，个人主义强，社会呈阳性	社会自由开放，权力距离小，个人主义强，社会偏阳性	等级制度严格，权力距离大，社会偏阳性
技术			
技术发展迅速，其电子、造船、石油、化工、通讯和生物技术水平位于世界前列	重工业和制造业发达并在世界处于重要地位	技术发展迅速，近些年高新技术涌现并得到快速发展	IT及其他一些高新技术产业发达

表 4：案例 PEST 分析

4.4 关键成功因素

接下来，我们从以上案例中总结出其关键成功因素：

4.3.1 新加坡裕廊开发区

1) 综合发展、合理规划

新加坡政府从一开始就将裕廊定为全面发展的综合型工业区，合理妥善地规划。根据地理环境的不同，将靠近市区的东北部划为新兴工业和无污染工业区，重点发展电子、电器及技术密集型产业；沿海的西南部划为港口和重工业区；中部地区为轻工业和一般工业区；沿裕廊河两岸则规划住宅区和各种生活设施。为充分发挥裕廊工业区的综合功能，新加坡政府于1969年9月在裕廊码头内设立自由贸易区，使裕廊工业区既是工业生产基地，同时也是转口贸易的活动场所。。

2) 完善基础设施，同步发展生产生活

国际上工业区基础设施建设一般有两种模式：一是先招商建厂，再根据生产的需要和扩展情况逐步解决交通、供水等问题；另一种模式是从整个工业区发展全面出发，按照总体建设规划的要求，先投入主要力量建成一完整的基础设施，为工业区的发展打下坚实基础。裕廊工业区是采取后一种模式，从一开始就把基础设施建设作为发展的重点，投入大量资金，形成基础设施系统，对裕廊工业区的发展有重要的推动作用。同时，各种社会服务设施也同步发展，兴建了学校、科学馆、商场、体育馆等，使裕廊工业区成为生产和生活综合体。生产和生活相得益彰，对工业区的人才储备起到了非常大的促进作用。

3) 有计划的招商引资

经济发展局负责在全世界范围内招商引资，它的目标客户主要包括三类，分别是：战略性公司，重点吸引其财务、市场等重要部门至园区内；技术创新型公司，重点吸引其核心产品及技术研发的部门至园区内；公司的重要部门，重点吸引其最复杂的生产程序和最先进的生产技术部门到园区内。通过这三类公司的引进，裕廊工业园区不再仅仅是一个低成本的生产中心，而是公司进行战略运作的长期基地。

新加坡政府还积极开展全方位招商活动。经济发展局每年都组织十几次有计划的招商活动，将招商活动分为总理级和部长级，对国家重大项目和重点国家地区的招商都请总理或副总理带领。新加坡政府首脑李光耀、前总理吴作栋、前副总理李显龙等频频率队赴美国、日本、欧洲各国为新加坡裕廊工业区招商。

新加坡经济发展局积极在全球范围内设立招商分支，在海外设有 28 个办事处，主要分布在美国、欧洲、日本、香港、台湾等国家和地区，其中在美国有

6 个办事处。为引进美国电子晶片圆盘项目，驻美办事处官员连续跟踪了 10 年，才使这个 10 亿美元以上的高科技项目落户新加坡。

4. 3. 2 德国鲁尔开发区

1) 以传统工业为基础，充实、调整区域产业结构

长期以来，煤、钢两大部门一直是鲁尔区发展的两大支柱，这两大部门陷于危机便直接导致鲁尔区经济结构的老化。因此从 20 世纪 60 年代开始，在国家的资助下，鲁尔区首先采取了对企业实行集中化、合理化的改造过程。把采煤集中到机械化程度高、盈利多的大矿井，关闭不盈利的小企业，对整个鲁尔煤田重新规划，统一部署，安排生产，并且实行了全盘机械化。钢铁工业也同期进行设备更新和技术改造，关闭和合并老厂，扩建新厂，进行企业内外调整，加强企业内部和企业之间的专业化与协作化；同时对钢铁工业的布局作了合理调整。其次，为了使鲁尔区的经济结构趋向多元化，联邦、州政府及鲁尔区煤管协会都想方设法改善鲁尔区的投资环境，鼓励新兴工业迁入鲁尔区。同时，第三产业蓬勃兴起，各城市大多已建有完善的服务业，服务网点遍及各个角落，在边缘地区开辟了不少新的旅游点，为旅游业的发展提供条件。这些措施使鲁尔区的经济结构得到了调整、充实和提升；也使煤和钢比重大幅下降，非煤、钢工业和第三产业比重大幅上升，新兴工业尤其是信息技术发展迅速。鲁尔区正朝着一个既有强大传统工业做基础、又有日渐壮大的新兴产业为增长点的多部门的综合工业区方向发展。

2) 不断更新区域结构，合理调整区内生产力布局

鲁尔区区域结构变化集中体现在其城市的职能演变上。鲁尔区是一个人口和城市的密集地区，城市的发展经历了“单一的煤矿城市”——“钢铁城市”——“化工城市”——“综合性城市”的发展道路；城市规划也从早期的杂乱无章的无规划状态，向全面规划的现代化城市发展。鲁尔区最早的产业布局都以接近原料地为原则，到二战前，基本形成东西延伸，以中部为核心的工矿区。在 20 世纪 60 年代区域总体规划中提出了划分三个不同地带、平衡全区生产力布局的设想，并规定在布局新企业时应首先考虑到安排在边缘发展地带，同时控制中心地带的发展，有计划地从核心地区向外缘迁厂。同时对传统产业依据不同的情况实行关、停、并、转。调整变化最明显的是钢铁工业，通过改造调整，钢铁工业面貌一新。由于大公司科技力量强，现代化水平高，生产成本低，产品精良，一大批“鲁尔制造”的特色产品，在国内外具有很强的竞争力，为鲁尔区赢得了很高的声誉。

3) 加强企业间的联系与协作，保证区域资源的合理配置

鲁尔区大企业之间以及大企业与中小企业之间有着广泛的联系和密切的协作关系，最早出现的煤钢联营的形式，以后又出现煤化、煤电以及钢铁与机械的联营，有的以合同的形式，有的则组成联合公司，既保证了生产，又稳定了销售，使区域内部的资源优势 and 加工能力优势得到充分发挥。鲁尔区的企业联盟关系促进了区内资源、交通等优势的优势的发挥，使鲁尔区成为资源地、生产地和消费地。

4) 开发工业传统资源，拓展区域产业新功能

在逆工业化的过程中，鲁尔区开始对自身积淀的区域资源进行开发利用的思考，尤其重视对工业遗产旅游资源的再开发。借鉴英国、瑞典等一些国家的经验，运用国际博览会形式，通过工业旅游开发，达到区域复兴。经过长达 10 多

年的摸索，走过了一条从零星景点的独立开发到区域性统一开发的模式，工业旅游已成为鲁尔区的新时尚。从景点开发模式来看，大致有四种具体模式：a. 博物馆开发模式。最典型的是将一个建于 1854 年的老钢铁厂改建为一个露天博物馆，其特色是设计了可提供儿童开展各种活动的游戏故事。活化了旅游区的真实感和历史感；b. 休闲、景观公园开发模式。蒂森公司将 1985 年停产的一家企业改造为以煤、钢铁工业景观为背景的大型景观公园。c. 购物旅游相结合的开发模式。即在工厂原址新建大型购物中心，旁边仍保存原有工业设施的博物馆，还配套建有美食文化街、体育中心、游乐园、影视设施，吸引大量旅游和购物的人流。d. 传统的工业区转换成现代科学园区、工商发展园区、服务产业园区等。工业旅游的开发在改善区域功能和形象上发挥了独特的效应。

4. 3. 3 伦敦多克兰开发区

1) 中央政府赋予伦敦多克兰发展公司的权利

英国中央政府给予了伦敦多克兰发展公司前所未有的权利，包括对土地买卖甚至强制获取权，这就可以让该公司对该地区进行统一的开发管理，而不用受限于各个区的政府在政府，为该公司对该地区的开发提供了前提。

2) 以市场为导向的规划运作

多克兰开发区在整个开发过程中规划的中心思想可以总结为：吸引“催化剂”式的投资或项目，通过一些大的开发项目引发与其相关的连锁反应的开发投资以及于此相适应的政府行为，以此来带动整个地区的开发。在政府财政困难的情况下，该开发区通过利用市场投资，大大的促进了该地区的发展。

3) 对整个地区基础设施的改造

通过对整个开发区的道路，轻轨以及机场的建设，不仅使得地区内部各个区域的交通变得畅通无阻，同时还与整个大伦敦地区的交通相连，交通状况得到很大的改善。同时 LDDC 公司还对房屋等其它基础设施建设进行了改善，提升了地区的投资价值，为吸引投资创造了前提条件。

4) 优越的地理位置

靠近伦敦中心城区，这是多克兰地区得以成功迅速发展的一个不可忽视的因素。靠近伦敦中心城区，但开发初期的地价却比伦敦中心城区地很多，优越的地理位置和地价上的优势为该地区的投资创造了需求。

4. 3. 4 印度斯里经济特区

虽然斯里仍处于其初期建设之中，但其仍能提供一些成功因素供曹妃甸学习。

1) 斯里特区在招商引资方面拥有明确的定位：主要吸引西方投资；也制定出明确的战略计划来吸引这些投资

这些从园区和营销两方面的设计上便能体现出来，比如对外国投资者取消关税和网站使用多种欧洲语言等。在明确的定位引导之下，斯里特区已经成功吸引来自法国、意大利、西班牙和香港等国家和地区的企业入驻。

2) 斯里特区向企业灌输强烈的环保意识

斯里特区试图吸引“可再生性能源和其他生态友好型产业入驻，并力求符合世贸组织制定的标准，在营销过程中重点强调区内的环境认证体系。从这些可以看出斯里特区所承担的环保责任。

3) 斯里特区为潜在客户提供了诱人的财政优惠

这些优惠包括：15 年的分级所得税免税期、货物税和关税豁免、销售税和附加税豁免、服务税豁免和所有地方税豁免。

4) 同步发展商业和服务业

距斯里 55 公里的钦奈居住着 450 万人。巨大的人口基础有助于帮助斯里吸引众多的商业和服务业企业，让其在发展其他产业的同时同步发展商业和服务业，促进产业综合发展。

4.5 成功开发区模式

从以上对案例关键成功因素的阐述中，我们发现，地理环境、产业结构、基础设施和招商策略对于一个经济开发区的发展至关重要。我们将这四点作为经济开发区成功发展的四个维度（如图 1 所示），表 5 是利用这四个维度对以上四个案例开发区关键成功因素的总结分析。

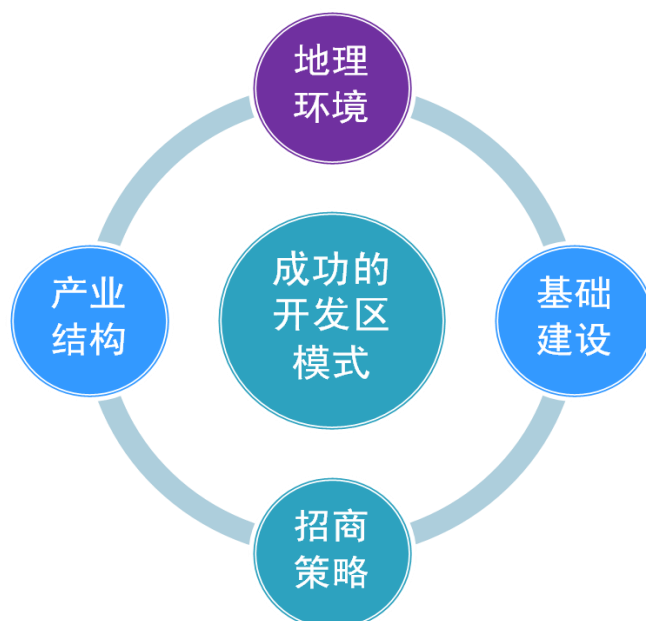


图 1: 开发区关键成功因素 4 维度

		裕廊	鲁尔	多克兰	斯里
地理环境	地理位置	新加坡西南沿岸，靠近国际航道	North Rhine-Westphalia German	靠近伦敦市中心	印度洋沿岸，距 Chennai 北部 55 公里
	自然资源	海水深，多丘陵可供填海	丰富的煤矿，靠近鲁尔河和其他欧洲开发区	靠近泰晤士河	没有特别的自然资源优势
产业结构	产业结构	多种产业形式综合发展	早期重点发展重工业，后期多种产业类型协调发展	工业、商业和社区同步发展	主要发展轻工业和商业
基础建设	交通	便利	便利	便利	便利
	电力	丰富	丰富	丰富	丰富
	水力	丰富	丰富	丰富	丰富
	住宅	健全	健全	健全	在建
	配套设施	健全	健全	健全	健全
招商策略	财政支援	政府指导拨款，税制优惠	税制优惠，价格补偿，投资津贴等	较低地价，建立企业园	税制优惠及当地服务支持
	社会责任	缓解就业压力，鼓励能源再生	创造就业机会，环境保护	创造就业机会，提高住房条件	倡导“绿色概念”开发区
	推广活动	国际性推广，设立分支或建立网站	政府主导，开展推广会增进与企业的沟通	积极的全国性推广	积极的网站推广

表 5: 案例维度分析

5. 对比分析

在这一部分里，我们将曹妃甸同外国开发区进行了对比分析。先通过 PEST 模型分析它们在外部环境上的异同，再利用前面总结出来得四个维度对比分析了曹妃甸和外国开发区的自身情况。

5.1 PEST 对比分析

差异是存在的，所以曹妃甸不能直接照搬以上案例的成功经验，只有和它们的大致情况类似，曹妃甸才能得到直接启示。于是，我们结合之前作出的 PEST 分析将曹妃甸的外部环境和以上案例的外部环境进行了对比分析。我们发现（如图 2 所示）：

曹妃甸和以上案例所处的国家都有相对稳定的政治环境，政府对经济开发区的发展都给予了大力支持；

曹妃甸和以上案例开发区都是在本国经济快速发展的时期发展起来的，即使遇到经济危机，政府也会采取措施刺激经济发展；

曹妃甸和以上案例所属国家政府都积极促进本国技术发展，这些国家都有高新技术产业；

然而，在社会环境方面，中国与这些国家稍有不同，西方国家一般社会氛围自由，中国则有较多的政策约束，崇尚儒家思想，从长计议。

所以，除社会环境方面稍有差异外，曹妃甸的外部环境与所选案例的外部环境基本类似，我们可以从以上案例中得到一些直接启示。

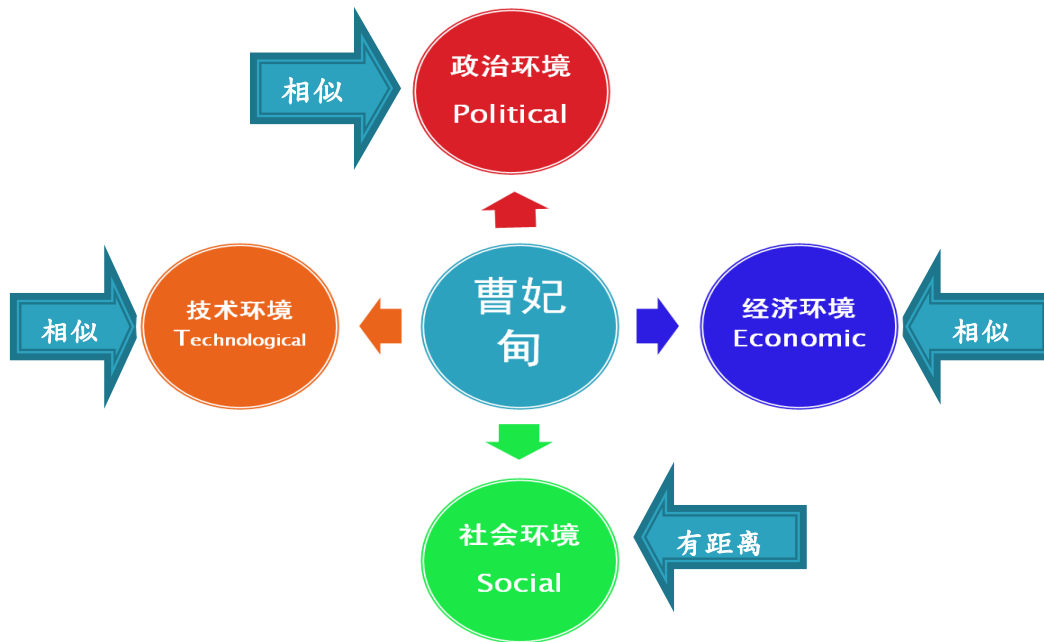


图 2：PEST 对比分析

5.2 维度对比分析

接着，我们按照之前总结出的四个维度将曹妃甸的自身情况与案例中开发区的自身情况进行了进一步对比分析（如表 6 所示）：

在地理环境方面，案例开发区均处于交通要道并拥有丰富的自然资源，例如鲁尔区就有丰富地煤矿；曹妃甸同样处于环渤海经济中心这样一个交通发达的位置上，同时自然资源丰富，特别是石油和海盐资源；

在产业结构方面，所选案例开发区都有适合或平衡的产业结构；目前曹妃甸重点开发重工业，但也有综合的产业结构规划；

在基础设施建设方面，所选案例开发区都有便利的交通系统和完善的电力、水力、住宅和配套设施系统；曹妃甸拥有海路一体化交通系统，但除水力系统外，其电力、住宅和配套设施都尚处于建设之中；

在招商策略方面，案例开发区政府都对其发展提供了财政支援，例如税制优惠等，这些开发区的发展也大都缓解了当地的就业压力并倡导环境保护，开发区积极开展推广活动，例如开设分支和建立网站用于宣传；曹妃甸的保税区正在筹建之中，这也是国家对其发展给予的财政支援，曹妃甸倡导的循环经济理念也是对中国可持续发展战略的支持，同时也是履行社会责任的体现，但在开发区推广方面，曹妃甸仍需推进更多的活动以吸引投资。

		外国开发区	曹妃甸
地理环境	地理位置	处于交通要道	渤海湾经济圈中心
	自然资源	比较丰富（除鲁尔区有丰富煤矿）	临海，丰富石油资源
产业结构	产业结构	适当, 有平衡的产业结构	以重工业为主
基础建设	交通	十分便利，有铁路，公路，码头	海陆一体化，便捷的码头，公路，铁路
	电力	完善	一期工程完毕
	水力	完善	完善
	住宅	完善	计划中. . .
	配套设施	完善（除斯里市）	计划中. . .
招商策略	财政支援	政府提供税制优惠等	保税区
	社会责任	解决失业问题，环境保护	循环经济，可持续发展
	推广活动	非常积极推广（网站，分行）	完善中. . .

表 6: 维度对比分析

***IS 6930 Residential Trip
Group D***

从这项分析我们可以看出：曹妃甸具有优越的自然地理条件，但仍需调整其产业结构，加强其基础设施建设，并改善其招商策略和方法。于是我们为其提出了一下发展建议。

6. 发展建议

这些发展建议包括一下三点：

1) 加强基础设施建设

国际上工业区基础设施建设有两种模式：一是先招商建厂，根据生产的需要和扩展情况逐步解决交通、供水等问题。此种模式的优点是，针对实际需要建设，针对性强，投入成本低，风险小；缺点则是，基础设施往往分散零乱，效率不高，阻碍生产的迅速发展。另一种模式则从整个工业区的全面发展出发，按照总体建设规划的要求，先投入主要力量建成较为完整的基础设施，为工业区的发展打下坚实基础。这种模式的优点是计划性较好，效率高，并可迅速改善投资环境，但投入成本和风险也较大。上述几个案例多是采用后一种模式，案例中基础设施的建成对当地其他方面的发展均产生了重要的推动作用且改善了当地的投资环境。

曹妃甸是通过吹沙造地，从完全未被利用的空白土地建设而来，现已在水电，交通，通信，燃气等基础设施方面去的一定得成就，并且也有相应的发展支持政策。但是相对于曹妃甸快速发展的经济而言，其基础设施建设还相对有些滞后，尤其是商业、社区的建造，还处于非常初级的阶段。配套基础设施建设是经济发展的前提和基础，为了打造更具吸引力的投资环境，曹妃甸还需在基础设施建设方面投入更多的精力。

鉴于曹妃甸地域广阔和完全是从荒地发展而来的特点，大范围的基础设施建设必将需要大量的投入。在这一点上，它可以效仿道克兰地区，选择较好的地块先启动（如将来的保税区），集中进行投资，建设此地块的基础设施，改善该地块的投资环境，并通过政策引导，先让企业主要在这一地段进行投资，等到此地发展成熟之后，再向周边辐射，开发周边的地块。这样既可缓解其发

展过程中的资金问题，更可通过有限的资金，起到一个杠杆作用，带动地区经济的发展。

2) 充实产业结构

鲁尔区的经验告诉我们充实产业结构的重要性。多年来，能源、制造两大部门一直都是曹妃甸经济发展的两大支柱。因此，我们可以以此为基础，调整、充实产业结构，不断更新区域结构，合理调整区内生产力布局。一方面确保能源、制造产业目前的支柱地位，对能源、制造两大产业部门的企业实行集中化、合理化的改造。把钢铁集中到唐钢等几个实力强、现代化程度高、盈利多的大企业，进行企业内外调整，加强企业内部和企业之间的专业化与协作化。另一方面，鼓励、刺激经济结构向多元化方向发展。曹妃甸需要设法改善其投资环境，鼓励新兴产业的建立和发展，尽一切可能利用唐山的优势，吸引北京、天津等高新技术企业来曹妃甸落户。同时，要大力扶持第三产业，建立完善的服务业。这样，不仅曹妃甸的产业结构得到了调整、充实和提升；而且曹妃甸也能朝着有强大的传统工业、又有日渐壮大的新兴产业为增长点的多部门、多行业的产业结构方向发展。

3) 定位明确地吸引国内外投资，并采取积极的推广方法

目前,曹妃甸在吸引国内企业投资上已经做的很好，同时也吸引了挪威、伊朗等一些国际性企业的入驻。在吸引国内国外投资的问题上我们建议曹妃甸需要有明确的定位规划。加强面向西方国家投资引进的战略定位和规划可以为曹妃甸带来机遇同时扩展区内企业组合。在西方资金引进定位中，对知识产权、企业社会责任和加强环境认证等问题的调研是必要的。其次就是要运用合适的战略规划和营销方法吸引国内和国际投资。由于中外企业存在差异，适用于中

国企业的方法不一定适用于外国企业，因此可采用差异化的营销策略吸引这两类不同的企业。

曹妃甸已明确自身功能定位并积极吸引符合其功能定位和产业发展规划的各行业领军企业前来进驻，但也要更明确具体这些企业的哪些部门是他们最希望引入的，这样可以提高企业引进的效率和效果。同时曹妃甸可以积极展开形式多样的招商策划活动，例如：在本地举办投资环境说明会，首先在本地范围内扩大开发区认知度；然后到目标引资地区举办项目招商会；也要搭建好与国际商会、国际银行、跨国公司的沟通渠道；设立驻外招商机构是从裕廊工业区案例中吸取的有益经验，这样可方便外国企业随时与开发区进行沟通，并在一定程度上扩大开发区在当地的影响力；亦可聘请招商顾问，获得专业咨询。

7. 执行计划

通过总结其他开发区以及对曹妃甸现状的分析，建议曹妃甸参考这一短期行动计划：

通过分析曹妃甸现今的竞争优势以及竞争劣势，决定以哪种类型的公司为目标，集中精力发展（建议 3）。

制定明确的，多元化的国际国内市场发展定位以及方向，并为每个发展方向提供适当的市场营销战略。并从西方公司寻求进一步的合作，以协助对外国公司市场营销（建议 3）。

根据目前的曹妃甸的基础建设，确定可能的替代产业（能够补充重型产业和劳动密集型产业）（建议 2）。

审查今后的基础设施项目，并确定哪些项目可以在现在的发展阶段快速进行，从而加快地区的发展（建议 1）。

8. 总结

曹妃甸有着优良的自然资源和优越的地理条件，它是一块黄金宝地，是中国环渤海地区冉冉升起的一颗耀眼明珠，这里商机无限，潜力无限。它所倡导的先进的循环经济模式符合可持续发展的观念，现已成为我国循环经济的示范点。在过去短短的 4 年时间里，曹妃甸的开发建设，得到了中国政府的高度重视和社会各界的广泛关注，有些大型项目已经建成并进入运行阶段。它蓬勃发展，吸引了来自国内外的各界投资者的目光，成为了渤海经济圈一颗冉冉升起的新星。

同时，作为一个年轻的开发区，曹妃甸在其发展过程中也有需要改进之处。而国外很多开发区的成功经验也必然有其值得借鉴之处，为他未来的发展提供新的思路，创造更大的机会。

因此我们查阅通过大量的相关资料，精选了四个国外开发区案例进行分析。同时我们通过曹妃甸的实地调查以及与曹妃甸工作人员的深度访谈，全面的了解了曹妃甸。在此基础上，我们结合实际情况提出了相应的建议：

- 1) 加强基础设施建设；
- 2) 充实产业结构；
- 3) 定位明确地吸引国内外投资，并采取积极的推广方法。

希望这些建议可以为曹妃甸的发展带来的新的思路，开创新的机遇。当然，国外成功的开发区还有很多，很多其它成功开发区同样值得我们研究与学习。而我们研究可以为将来更深层次的国外开发区研究提供相应的资料，为此类研究打下基础。

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