

海外僑臺商經營動向與投資環境
調查報告
(非洲部分)



中華民國僑務委員會
Overseas Community Affairs Council
Republic of China [Taiwan]

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第六章 非洲僑臺商企業經營動態與營商環境

第一節 非洲僑臺商企業經營概況

在 1,617 位受訪僑臺商中，64 家位於非洲，占有效問卷的比例為 4.0%。在 64 位非洲受訪僑臺商中，38 家屬微型企業，占有效問卷的比例為 59.4%。其次是小型企業，比例為 17.2%，第三是大型企業，比例為 12.5%。最後是中型企業，比例為 10.9%。（見表 6-1）

表 6-1 非洲受訪僑臺商的規模分布（2021 年第 4 季）

項目類別	家數	比例（%）
微型企業（50 人以下）	38	59.4
小型企業（51—100 人）	11	17.2
大型企業（500 人以上）	8	12.5
中型企業（101—500 人）	7	10.9
合計	64	100.0

說明：括弧內數字為員工規模。

資料來源：本研究整理。

在 64 位非洲受訪僑臺商中，25 家僑臺商從事製造業，占有效問卷的比例為 39.1%。其中尤以食品暨紡織製造業最多，計 11 家，占受訪製造業僑臺商的比例為 44.0%。其餘依序是水電燃氣與初級產業（20.0%）、基礎原物料及其他製造業（16.0%）、石化暨生技醫療業（8.0%）、電力暨機械設備業（4.0%）、運輸工具零件業（4.0%），以及電子暨光學業（4.0%）。（見表 6-2）

表 6-2 非洲受訪製造業僑臺商的行業分布（2021 年第 4 季）

項目類別	家數	比例（%）
食品暨紡織	11	44.0
初級與水電燃氣業	5	20.0

項目類別	家數	比例 (%)
基礎原物料及其他製造業	4	16.0
石化暨生技醫療	2	8.0
電子暨光學	1	4.0
電力暨機械設備	1	4.0
運輸工具零件	1	4.0
合計	25	100.0

資料來源：本研究整理。

在 64 位非洲受訪僑臺商中，39 家僑臺商從事服務業，占有效問卷的比例為 60.9%。其中尤以批發零售服務業為最多，計 19 家，占受訪服務業僑臺商的比例為 48.7%。其次是其他服務業，比例為 30.8%。第三是運輸及倉儲、營建工程與住宿及餐飲業，比例皆為 5.1%。（見表 6-3）

表 6-3 非洲受訪服務業僑臺商的行業分布（2021 年第 4 季）

項目類別	家數	比例 (%)
其他服務業	12	30.8
批發零售	19	48.7
住宿及餐飲	2	5.1
運輸與倉儲	2	5.1
營建工程	2	5.1
不動產業	1	2.6
金融與保險	1	2.6
合計	39	100.0

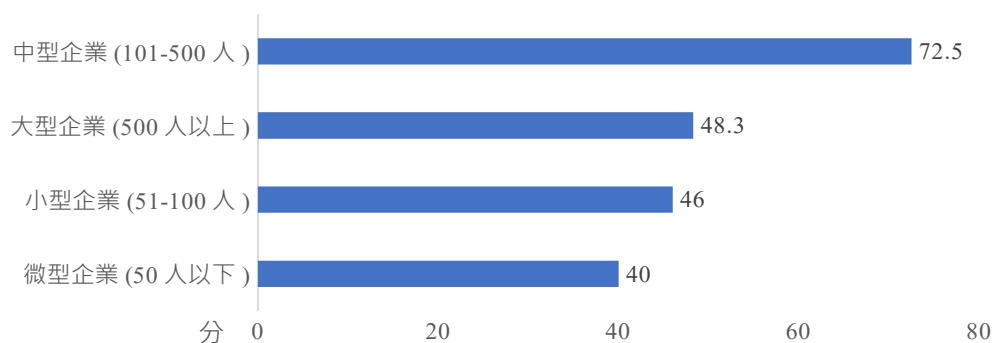
資料來源：本研究整理。

壹、非洲僑臺商製造業經營動能指數

2021 年第 4 季非洲製造業僑臺商經營動能指數（OC-BMI）為 48.4 分，低於 50 分的景氣榮枯線，且居全球六大洲之末，顯示非洲受疫情影響以及若干國家政治動盪，經濟復甦仍乏力。非洲製造業以中型企業表現

最佳，OC-BMI 達 72.5 分。大型、小型與微型企業都落入緊縮區間，彼此差異有限，OC-BMI 介於 40 分至 49 分之間。（見圖 6-1）

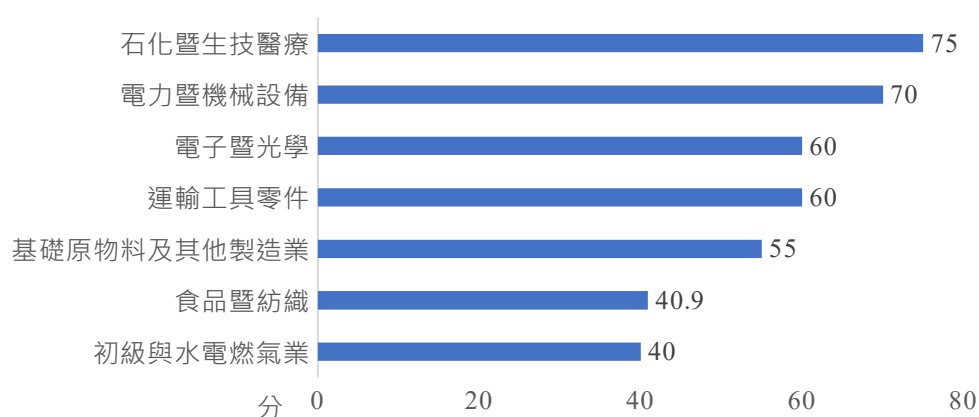
圖 6-1 非洲各類型製造業僑臺商經營動能指數（2021 年第 4 季）



資料來源：本研究整理。

以行業別來看，2021 年第 4 季，非洲製造業以石化暨生技醫療製造業表現最佳，OC-BMI 達 75.0 分。電力暨機械設備業其次，OC-BMI 達 70.0 分。另電子暨光學業、運輸工具零件業，以及基礎原物料業及其他製造業都處於擴張階段。（見圖 6-2）

圖 6-2 非洲各行業製造業僑臺商經營動能指數（2021 年第 4 季）

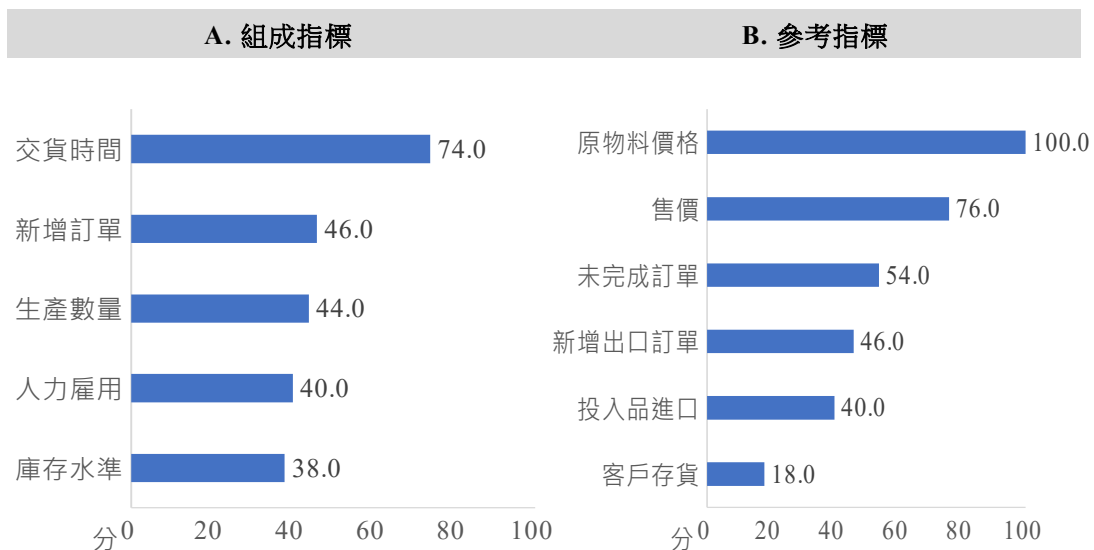


資料來源：本研究整理。

就組成指標而言，全球需求暢旺疊加航運繁忙，拉長非洲僑臺商交貨時間，是推升非洲製造業 OC-BMI 的關鍵因素。另鑑於疫情反覆與政治風險攀升，大多數廠商難以提高安全庫存水準。

參考指標方面，非洲製造業 OC-BMI 中的原物料價格高達 100 分，即全部 25 位僑臺商都填答原物料價格上漲，為非洲僑臺商共同面臨的問題。此外，售價亦攀升到 76.0 分，顯示廠商逐步將成本轉嫁到中下游。（見圖 6-3）

圖 6-3 非洲製造業僑臺商經營動能擴散指標分析（2021 年第 4 季）



資料來源：本研究整理。

非洲僑臺商製造業規模反映出承受經濟擾動的能力。組成指標方面，中型企業的生產數量、新增訂單與人力雇用，分別為 75.0 分、87.5 分與 75.0 分，皆高於 50 分的景氣榮枯線。反之，大型、小型與微型企業的上述三個指數都陷於緊縮區間，且規模愈小，衰退程度相對較嚴重。

而參考指標方面，中型企業在未完成訂單、新增出口訂單，以及投入

品進口上皆有高於 50 分的表現，惟客戶存貨低於 50 分的景氣榮枯線。
（見表 6-4）

表 6-4 非洲各規模製造業僑臺商經營動能擴散指標分析（2021 年第 4 季）

單位：分

項目類別	大型	中型	小型	微型
組成指標				
生產數量	41.7	75.0	40.0	35.0
新增訂單	41.7	87.5	40.0	35.0
人力雇用	33.3	75.0	30.0	35.0
庫存水準	41.7	50.0	50.0	25.0
交貨時間	83.3	75.0	70.0	70.0
參考指標				
客戶存貨	16.7	37.5	30.0	5.0
未完成訂單	75.0	62.5	50.0	40.0
新增出口訂單	25.0	50.0	50.0	55.0
投入品進口	33.3	62.5	40.0	35.0
原物料價格	100.0	100.0	100.0	100.0
售價	83.3	100.0	60.0	70.0

資料來源：本研究整理。

最後，非洲僑臺商石化生醫產業經營表現最佳，於 OC-BMI 組成指標中的生產數量、新增訂單與人力雇用皆有 75 分。同時，石化生醫製造業於參考指標中的未完成訂單、新增出口訂單，以及投入品進口亦得 75 分

項目類別	運輸 工具	食品 紡織	石化 生醫	電子 光學	電機 設備	原料 其他	初級與水 電燃氣業
售價	100.0	68.2	75.0	100.0	100.0	100.0	60.0

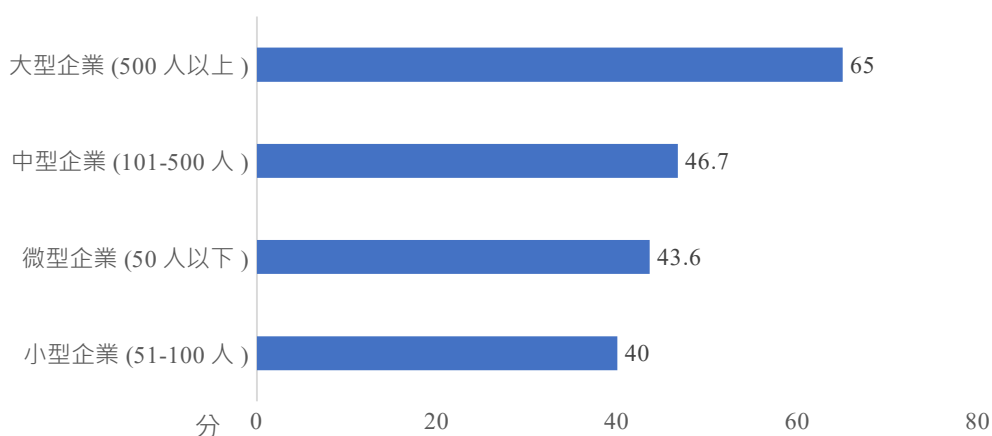
資料來源：本研究整理。

貳、非洲僑臺商服務業經營動能指數

全球疫情反覆疊加嚴格的封鎖措施，壓抑服務業成長。其中，非洲服務業 OC-BMI 為 44.1 分，落在緊縮區間，惟仍高於亞洲的 40.6 分。

2021 年第 4 季非洲服務業僑臺商 OC-BMI 以企業規模來看，大型企業表現最佳，OC-BMI 為 65.0 分；中型、小型與微型企業都陷入緊縮階段，OC-BMI 差異有限，都介於 40 至 47 分之間。（見圖 6-4）

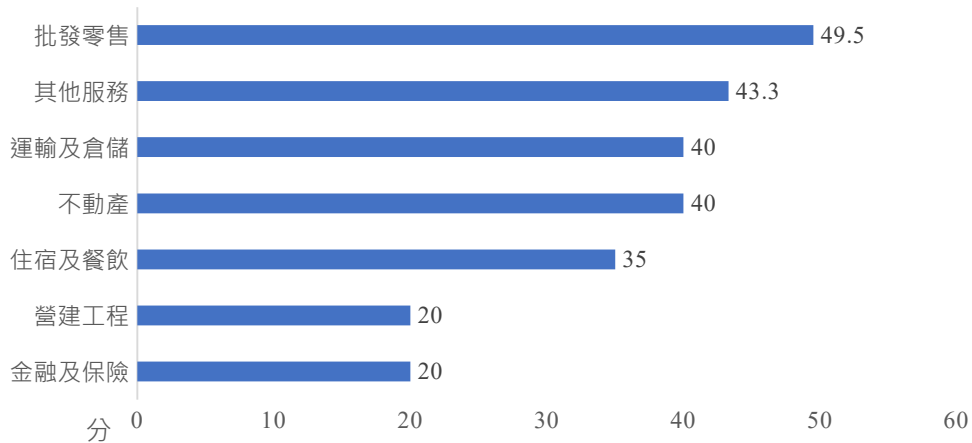
圖 6-4 非洲各類型服務業僑臺商經營動能指數（2021 年第 4 季）



資料來源：本研究整理。

2021 年第 4 季，非洲所有服務業行業都陷入緊縮區間；其中，批發零售業的 OC-BMI 為 49.5 分，逼近 50 分的景氣榮枯線。反之，營建工程業、金融及保險業的 OC-BMI 僅 20.0 分。（見圖 6-5）

圖 6-5 非洲各行業服務業僑臺商經營動能指數（2021 年第 4 季）

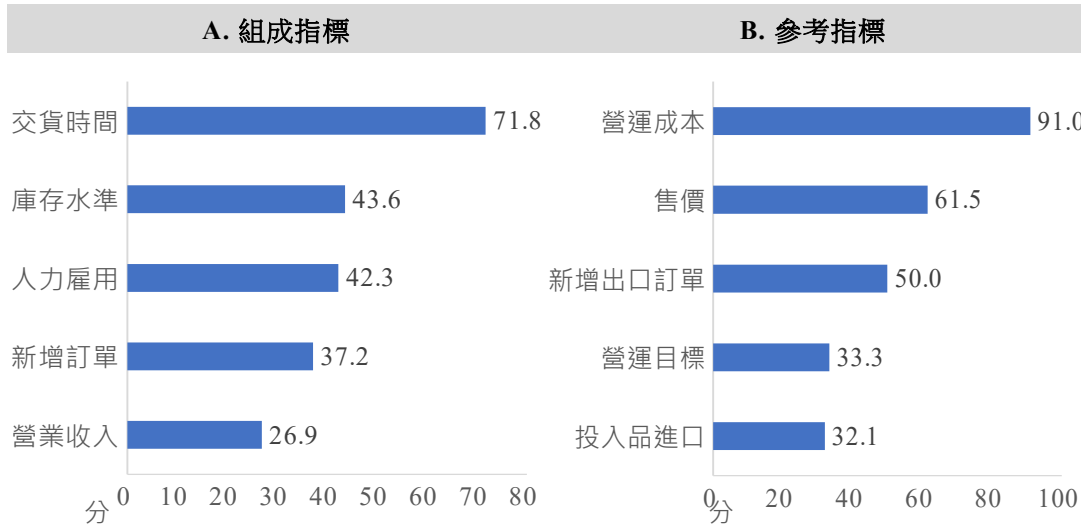


資料來源：本研究整理。

全球需求暢旺疊加航運繁忙，拉長非洲服務業僑臺商交貨時間，是推升 OC-BMI 的關鍵因素。另鑑於疫情反覆與政治風險攀升，服務業僑臺商營收與新增訂單緊縮，不易增補人力與庫存。

OC-BMI 參考指標中的營運成本高達 91.0 分，是所有僑臺商共同面臨的困難。售價亦攀升到 61.5 分，顯示廠商逐步將成本轉嫁到末端消費。受到疫情影響，非洲服務業僑臺商普遍緊縮投入品進口與營運目標。（見圖 6-6）

圖 6-6 非洲服務業僑臺商經營動能擴散指標分析（2021 年第 4 季）



資料來源：本研究整理。

非洲僑臺商服務業規模反映出承受經濟擾動的能力。除大型、中型與小型企業於 OC-BMI 組成指標中的人力雇用達 50 分的景氣榮枯線外，營業收入與新增訂單皆低於 50 分；微型企業於生產數量、新增訂單與人力雇用上更皆低於 50 分的景氣榮枯線，陷於緊縮區間，並顯示規模愈小，人力雇用得分愈低。（見表 6-6）

表 6-6 非洲各規模服務業僑臺商經營動能擴散指標分析（2021 年第 4 季）

單位：分

項目類別	大型	中型	小型	微型
組成指標				
營業收入	25.0	16.7	16.7	30.4
新增訂單	25.0	0.0	41.7	41.1
人力雇用	100.0	50.0	50.0	35.7
庫存水準	100.0	83.3	25.0	39.3
交貨時間	75.0	83.3	66.7	71.4
參考指標				
營運目標	25.0	16.7	41.7	33.9
新增出口訂單	75.0	50.0	50.0	48.2
投入品進口	75.0	33.3	16.7	32.1
營運成本	100.0	100.0	83.3	91.1
售價	100.0	66.7	41.7	62.5

資料來源：本研究整理。

最後，非洲僑臺商金融及保險業經營與住宿及餐飲業表現相對較佳，營業收入、新增訂單皆為 50 分。同時，住宿及餐飲業營運目標、新增出口訂單亦有 50 分表現，優於其餘行業，緊接著的是金融及保險業。（見表 6-7）

表 6-7 非洲各行業服務業僑臺商經營動能擴散指標分析（2021 年第 4 季）

單位：分

項目類別	物流	金融	營建	房產	食宿	批發	其他
組成指標							
營業收入	0.0	50.0	25.0	0.0	50.0	26.3	29.2
新增訂單	25.0	50.0	25.0	0.0	50.0	39.5	37.5
人力雇用	50.0	0.0	50.0	50.0	25.0	47.4	37.5
庫存水準	50.0	0.0	0.0	100.0	25.0	55.3	33.3
交貨時間	75.0	0.0	50.0	50.0	25.0	78.9	79.2
參考指標							
營運目標	0.0	0.0	50.0	50.0	50.0	42.1	20.8
新增出口訂單	50.0	50.0	50.0	50.0	50.0	50.0	50.0
投入品進口	25.0	50.0	25.0	50.0	25.0	21.1	50.0
營運成本	100.0	0.0	100.0	100.0	100.0	97.4	83.3
售價	75.0	0.0	50.0	50.0	50.0	68.4	58.3

說明：物流=運輸與倉儲。金融=金融與保險。營建=營建工程。房產=不動產業。食宿=住宿及餐飲。批發=批發零售。其他=其他服務業。

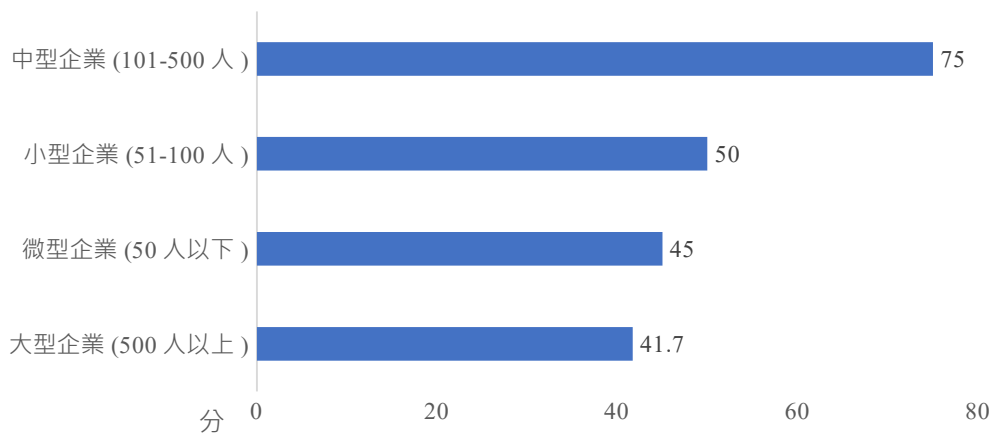
資料來源：本研究整理。

第二節 非洲僑臺商企業經營預期概況

壹、非洲僑臺商製造業經營預期指數

2021 年第 4 季，非洲製造業 OC-BEI 為 50.0 分，位於景氣榮枯線交界，僅高於大洋洲的 44.4 分。非洲製造業僑臺商 OC-BEI 以中型企業最具信心，OC-BEI 達 75.0 分。小型企業位於景氣榮枯線交界，至於大型與微型企業則預期景氣持續緊縮，彼此差異有限，OC-BEI 介於 41 分至 45 分之間。（見圖 6-7）

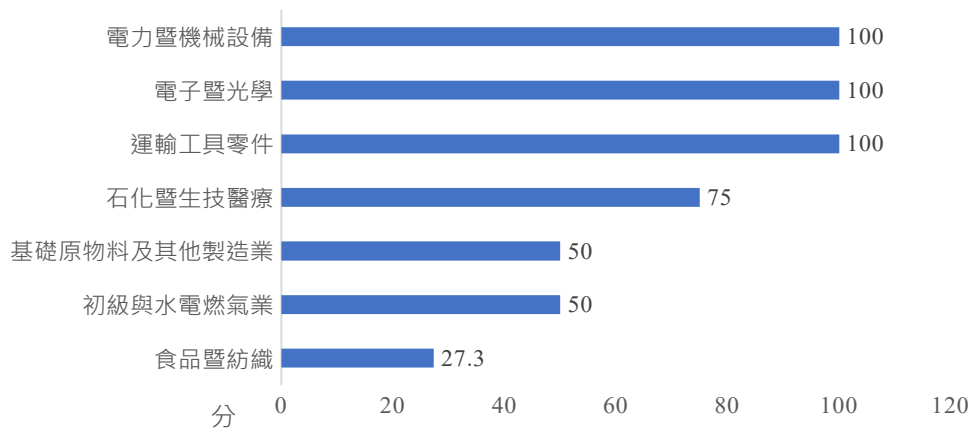
圖 6-7 非洲各類型製造業僑臺商經營預期指數（2021 年第 4 季）



資料來源：本研究整理。

2021 年第 4 季，非洲電力暨機械設備業、電子暨光學業，以及運輸工具零件製造業 OC-BEI 皆為 100 分，且石化暨生技醫療業、基礎原物料及其他製造業，以及初級與水電燃氣業也預期景氣回暖。（見圖 6-8）

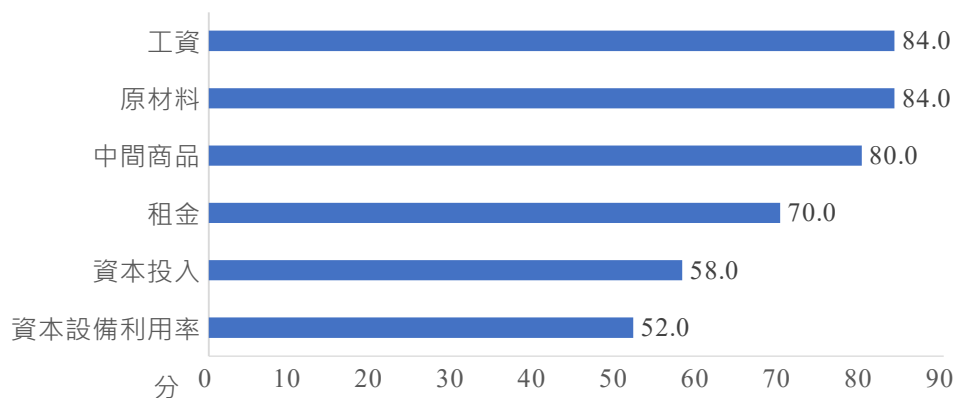
圖 6-8 非洲各行業製造業僑臺商經營預期指數（2021 年第 4 季）



資料來源：本研究整理。

非洲製造業 OC-BEI 參考指標指出，工資、原材料、中間商品與租金預期上揚，顯示廠商普遍擔憂成本飆漲，可能是推升製造業 OC-BEI 的關鍵因素。而製造業僑臺商預期資本設備利用率跌落悲觀預期區，顯示企業為因應成本驟增而傾向縮減產能。（見圖 6-9）

圖 6-9 非洲製造業僑臺商經營預期擴散指標分析（2021 年第 4 季）



資料來源：本研究整理。

非洲大型、小型與微型僑臺商製造業首要面臨的壓力，皆為國際大宗

原物料與能源上漲，而中型企業的首要壓力為工資上漲。同時，製造業僑臺商也預期，漲勢將向中間商品蔓延。惟若干跡象顯示，僑臺商製造業的經營預期分殊，最佳例證是大型與中型企業對工資的抗壓力優於小型與微型企業，故更願意投入資本與提高資本設備利用率。（見表 6-8）

表 6-8 非洲各規模製造業僑臺商經營預期擴散指標分析（2021 年第 4 季）

單位：分

項目類別	大型	中型	小型	微型
原材料	91.7	62.5	90.0	85.0
中間商品	83.3	75.0	80.0	80.0
工資	83.3	87.5	90.0	80.0
租金	83.3	62.5	70.0	65.0
資本投入	83.3	100.0	30.0	40.0
資本設備利用率	66.7	75.0	40.0	40.0

資料來源：本研究整理。

最後，非洲僑臺商電子光學製造業預期最為樂觀，資本投入與資本設備利用率皆為 100 分。其次，運輸工具業、石化暨生技醫療業、電力機械業、原料其他製造業，於資本投入與資本設備利用率上皆高於 50 分。最後則是食品紡織業、初級與水電燃氣業，資本設備利用率皆跌落 50 分景氣榮枯線下。（見表 6-9）

表 6-9 非洲各行業製造業僑臺商經營預期擴散指標分析（2021 年第 4 季）

單位：分

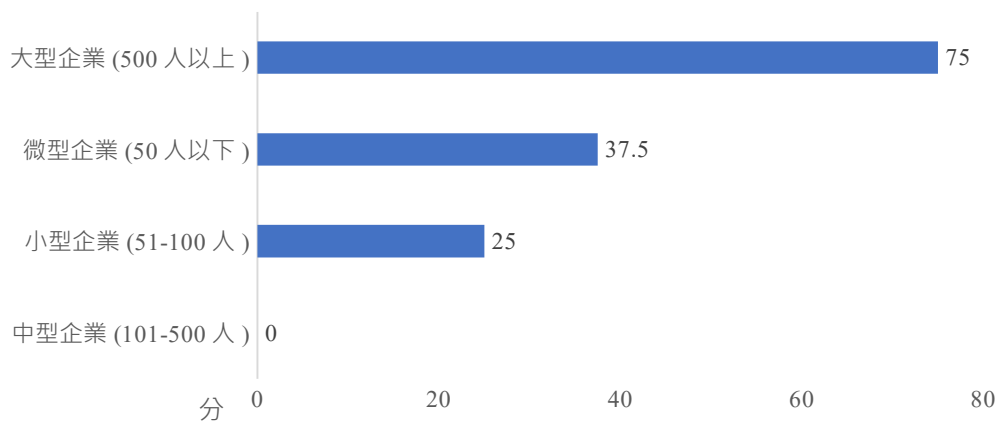
項目類別	運輸	食品	石化	電子	電機	原料	初級與水
	工具	紡織	生醫	光學	設備	其他	電燃氣業
原材料	0.0	81.8	100.0	100.0	50.0	87.5	100.0
中間商品	0.0	77.3	75.0	100.0	50.0	100.0	90.0
工資	50.0	90.9	75.0	50.0	50.0	87.5	90.0
租金	50.0	81.8	50.0	50.0	50.0	62.5	70.0
資本投入	50.0	54.5	50.0	100.0	100.0	62.5	50.0
資本設備利用率	100.0	40.9	75.0	100.0	50.0	62.5	40.0

資料來源：本研究整理。

貳、非洲僑臺商服務業經營預期指數

鑑於疫情反覆與景氣復甦陰霾，內需動能受限，非洲服務業 OC-BEI 為 34.6 分，預期緊縮將持續到下一季，並且居全球之末。2021 年第 4 季，非洲服務業僑臺商以大型企業最具信心，OC-BEI 達 75.0 分。微型、小型與中型企業則預期景氣持續緊縮。其中，中型企業 OC-BEI 趨近於零，充分顯露高度擔憂未來經濟。（見圖 6-10）

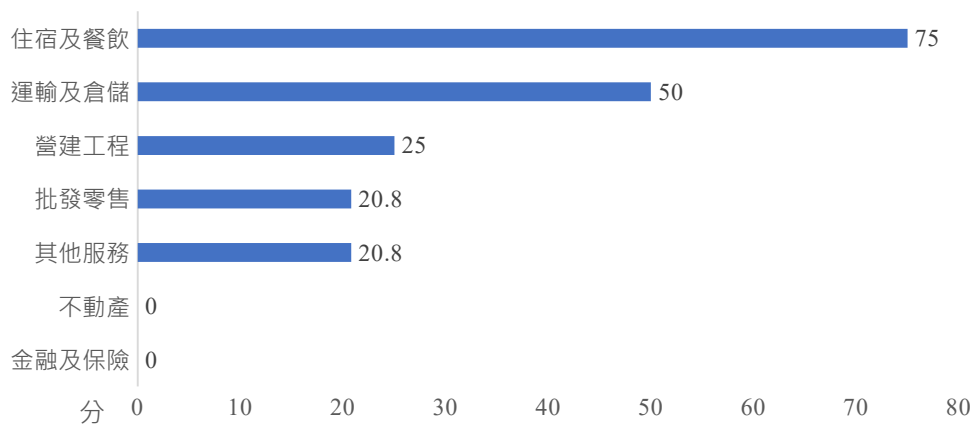
圖 6-10 非洲各類型服務業僑臺商經營預期指數（2021 年第 4 季）



資料來源：本研究整理。

2021 年第 4 季，經營住宿及餐飲業、運輸及倉儲業的非洲僑臺商預期景氣趨於擴張；其餘行業則陷於高度悲觀，OC-BEI 都在 30 分以下，大幅偏離 50 分的景氣榮枯線。（見圖 6-11）

圖 6-11 非洲各行業服務業僑臺商經營預期指數（2021 年第 4 季）

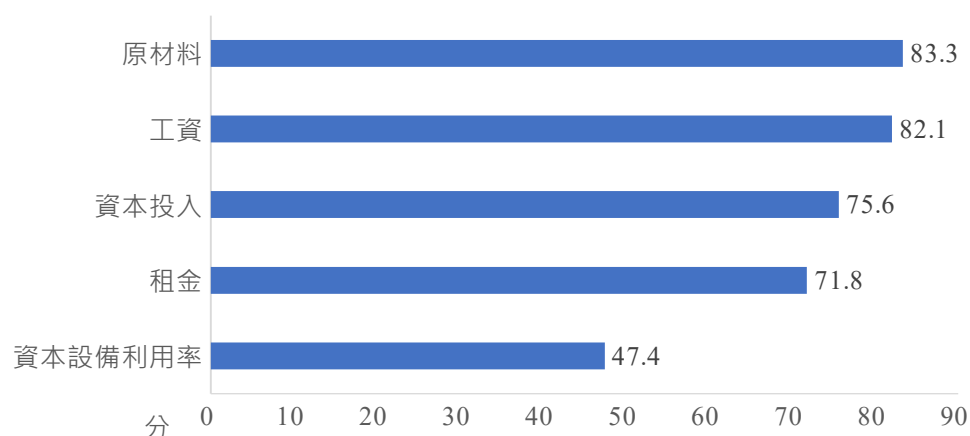


資料來源：本研究整理。

非洲服務業 OC-BEI 參考指標指出，工資、原材料、中間商品與租金

預期上揚，顯示廠商普遍擔憂成本飆漲，可能是推升服務業 OC-BEI 的關鍵因素。（見圖 6-12）

圖 6-12 非洲服務業僑臺商經營預期擴散指標分析（2021 年第 4 季）



資料來源：本研究整理。

大型服務業僑臺商面臨的壓力為工資與租金；中、小型企業首要面臨工資的壓力；而微型企業則面臨國際大宗原物料與能源上漲壓力。資本投入以大型與中型服務業預期最優，資本設備利用率則以大型服務業最優，小型服務業次之。中型與微型服務業則資本設備利用率皆跌落 50 分景氣榮枯線下。（見表 6-10）

表 6-10 非洲各規模服務業僑臺商經營預期擴散指標分析（2021 年第 4 季）

單位：分

項目類別	大型	中型	小型	微型
原材料	75.0	66.7	66.7	89.3
工資	100.0	83.3	83.3	80.4
租金	100.0	50.0	50.0	76.8

項目類別	大型	中型	小型	微型
資本投入	100.0	100.0	83.3	69.6
資本設備利用率	75.0	33.3	50.0	46.4

資料來源：本研究整理。

最後，非洲僑臺商運輸與倉儲業以及住宿與餐飲業未來預期最為樂觀於資本投入上皆得 100 分，且資本設備利用率亦得 75 分以上。其次，其他服務業資本投入得 66.7 分，且資本設備利用率亦在 50 分以上。

不動產業於資本投入上達 100 分，批發零售則達 78.9 分，惟資本設備利用率已陷於悲觀預期區。（見表 6-11）

表 6-11 非洲各行業服務業僑臺商經營預期擴散指標分析（2021 年第 4 季）

單位：分

項目類別	物流	金融	營建	房產	食宿	批發	其他
原材料	100.0	50.0	75.0	0.0	75.0	81.6	95.8
工資	50.0	100.0	75.0	50.0	75.0	86.8	83.3
租金	100.0	0.0	75.0	0.0	50.0	71.1	83.3
資本投入	100.0	50.0	50.0	100.0	100.0	78.9	66.7
資本設備利用率	75.0	0.0	25.0	0.0	75.0	44.7	54.2

說明：物流=運輸與倉儲。金融=金融與保險。營建=營建工程。房產=不動產業。食宿=住宿及餐飲。批發=批發零售。其他=其他服務業。

資料來源：本研究整理。

第三節 非洲僑臺商營商環境概況

壹、非洲製造業僑臺商營商環境指數

在非洲製造業僑臺商營商環境指數的 15 項構成指數中，僅合夥與勞資糾紛一項的改善比例，高於惡化比例，加權平均 52 分，高於 50 分的門檻。其餘 14 項指標都呈現不同程度的退步。其中，退步最多的五項指標為治安環境、海關手續、行政效率、利潤匯出效率，以及租稅或關稅，這都與地主國行政效能直接相關。（見表 6-12）

表 6-12 非洲製造業僑臺商營商環境分析（2021 年第 4 季）

項目類別	改善 (%)	惡化 (%)	持平 (%)	評分 (分)
合夥與勞資糾紛	20.0	16.0	64.0	52.0
開放投資項目	20.0	28.0	52.0	46.0
基礎建設	16.0	32.0	52.0	42.0
人力素質	12.0	28.0	60.0	42.0
貸款回收效率	0.0	50.0	80.0	40.0
法律法規	8.0	32.0	60.0	38.0
生活環境友善度	12.0	40.0	48.0	36.0
市場規模且成長前景	12.0	40.0	48.0	36.0
同業競爭壓力	8.0	36.0	56.0	36.0
融資便利度	0.0	44.0	56.0	28.0
租稅或關稅	0.0	44.0	56.0	28.0
利潤匯出效率	0.0	48.0	52.0	26.0
行政效率	12.0	64.0	24.0	24.0
海關手續	4.0	64.0	32.0	20.0
治安環境	8.0	68.0	24.0	20.0

資料來源：本研究整理。

貳、非洲服務業僑臺商營商環境指數

在非洲服務業僑臺商營商環境指數的 15 項組成指標中，僅開放投資

項目一項改善比例，等於惡化比例，加權平均 50 分為榮枯分界線。其餘 14 項指標都呈現不同程度的退步。其中，退步最多的五項指標為治安環境、海關手續、同業競爭壓力、利潤匯出效率，以及行政效率。除利潤匯出效率外，其餘四項皆與地主國政府效能相關。惟如前所述，隨各國愈益重視非洲市場，同業競爭壓力也更加激烈。（見表 6-13）

表 6-13 非洲服務業僑臺商營商環境分析（2021 年第 4 季）

項目類別	改善 (%)	惡化 (%)	持平 (%)	評分 (分)
開放投資項目	28.2	28.2	43.6	50.0
人力素質	10.3	20.5	69.2	44.9
合夥與勞資糾紛	7.7	23.1	69.2	42.3
生活環境友善度	12.8	33.3	53.8	39.7
基礎建設	17.9	38.5	43.6	39.7
市場規模且成長前景	17.9	43.6	38.5	37.2
融資便利度	12.8	41.0	46.2	35.9
貸款回收效率	2.6	35.9	61.5	33.3
租稅或關稅	5.1	46.2	48.7	29.5
法律法規	5.1	46.2	48.7	29.5
行政效率	15.4	59.0	25.6	28.4
利潤匯出效率	7.7	53.8	38.5	26.9
同業競爭壓力	0.0	51.3	48.7	24.4
海關手續	2.6	56.4	41.0	23.1
治安環境	7.7	69.2	23.1	19.2

資料來源：本研究整理。

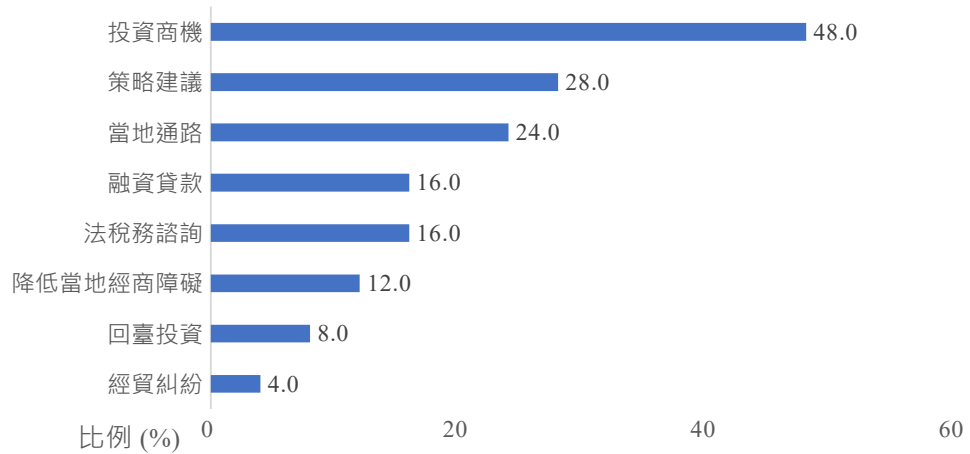
第四節 非洲僑臺商運用外館資源與未來需求

壹、非洲僑臺商運用外館資源

非洲製造業僑臺商最常使用的外館資源，依序為獲得海內外投資商機資訊（48.0%）、提供國際政治情勢分析與投資策略建議（28.0%），以

及建立當地通路（24.0%）。（見圖 6-13）

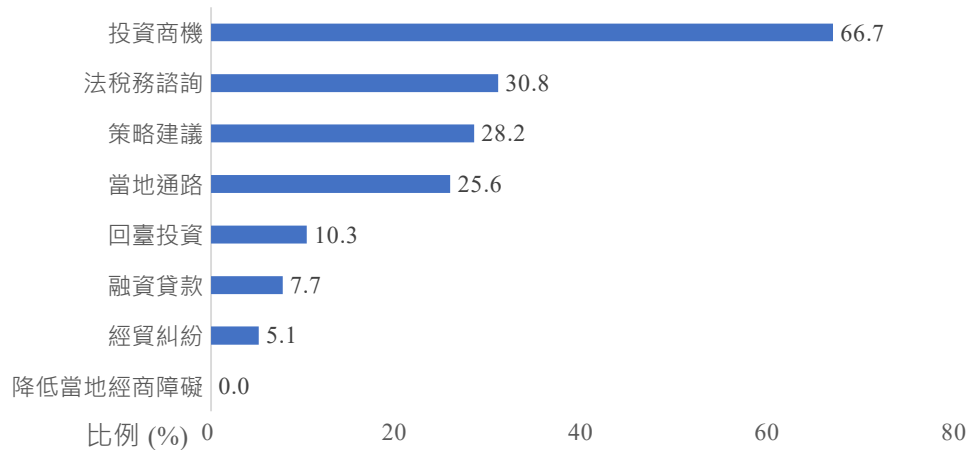
圖 6-13 非洲製造業僑臺商運用外館資源比例（2021 年第 4 季）



資料來源：本研究整理。

非洲服務業僑臺商最常運用的外館資源，依序為獲取海內外投資商機資訊（66.7%）、當地法務與稅務相關議題諮詢（30.8%），以及提供國際政治情勢分析與投資策略建議（28.2%）。（見圖 6-14）

圖 6-14 非洲服務業僑臺商運用外館資源比例（2021 年第 4 季）



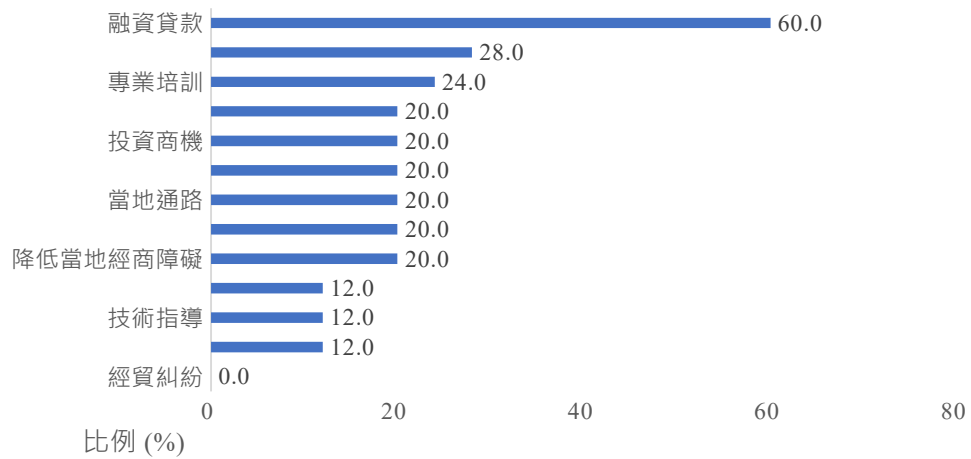
資料來源：本研究整理。

歸納非洲僑臺商運用外館資源的問卷結果可得知，「海內外投資商機資訊」是非洲僑臺商最常使用之外館資源，服務業使用比例高達 66.7%，製造業亦有 48.0%。「國際政治情勢分析與投資策略建議」以及「擴展當地通路」等服務，亦為非洲製造業及服務業之僑臺商經常使用外館資源，非洲僑臺商使用之比例皆逾 20%。「法務與稅務諮詢」服務上，非洲服務業僑臺商的需求比例（30.8%）較製造業僑臺商（16%）更高。

貳、非洲僑臺商未來需求建議

非洲製造業僑臺商期望未來僑臺商政策協助，以僑臺商融資貸款優先比例為 60.0%。其他所需協助與服務包括補助資源、專業培訓、聘僱媒合、商會交流、降低當地經商障礙、當地法務與稅務相關議題諮詢、當地通路與投資商機，介於 20%至 30%之間。（見圖 6-15）

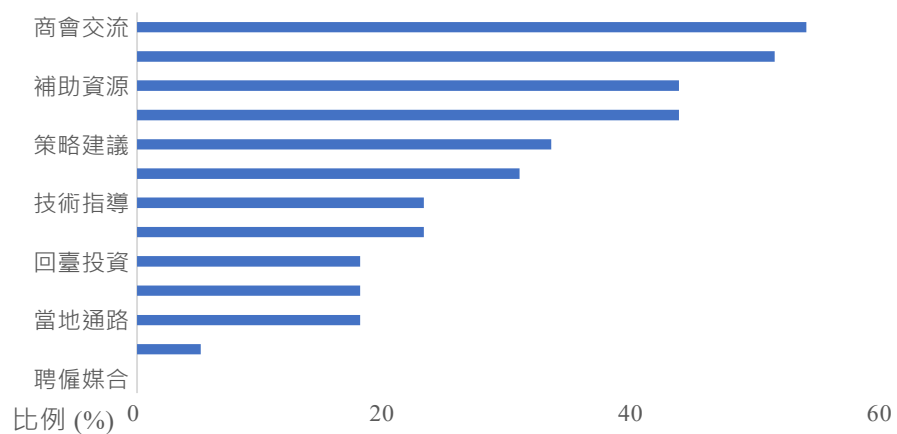
圖 6-15 非洲製造業僑臺商外館資源需求比例（2021 年第 4 季）



資料來源：本研究整理。

非洲服務業僑臺商期望的政策協助，以商會平臺交流最為殷切，比例為 53.8%。其次是融資貸款，比例為 51.3%。第三是補助資源與海內外投資商機資訊，比例皆為 43.6%。（見圖 6-16）

圖 6-16 非洲服務業僑臺商外館資源需求比例（2021 年第 4 季）



資料來源：本研究整理。

歸納問卷結果，非洲製造業與服務業僑臺商未來對於外館資源的需求以「獲得融資貸款」為主，占比皆有五成以上。製造業者除了在融資貸款上有六成的需求外，其餘資源項目的需求比例皆低於三成；而服務業者首重資源為「商會平臺交流」，除外在融資貸款、補助資源、海內外投資商機資訊與法務及稅務諮詢等服務上，皆有高於四成的需求。

在資源需求項目中，非洲服務業與製造業因產業特性而有不同需求：服務業者對於商會平臺交流的強勁需求（53.8%），應與服務業變化快速，商會傳統上作為凝聚海外僑臺商的平臺，使僑臺商相互協助支持並交流市場商機有關；而製造業僑臺商隨著國際生產鏈移動至全球各個角落，對於技術人才的需求亦為重點服務需求之一，然而就此服務業僑臺商對當地聘僱媒合尚無需求。

參、非洲僑臺商外館資源需求建議

非洲市場廣大人口眾多，隨經濟逐漸發展，龐大消費性市場受到全球矚目。過去僑臺商在南非經營已久，而人口高達 3.4 億的西非及中非亦充滿商機。依據本研究統計，2021 年第 4 季非洲製造業僑臺商經營動能指數（OC-BMI）為 48.4 分，服務業則為 44.1 分，皆於六大洲後段班，顯示疫情對非洲所帶來負面衝擊。

總體而言，非洲勞力密集型工作較高，疫情造成人流與商業活動減少社會大眾面臨收入減少或失業。再加上食品價格的大幅上漲，使得非洲部分地區出現飢餓貧困狀況。所幸非洲人口結構年輕化，雖染疫率相對較高，尚未發生醫療崩潰情況。

非洲製造業 OC-BEI 得分 50.0 分，服務業則為 34.6 分，顯示非洲僑臺商對於非洲未來景氣保守預期。惟於質性訪談中，受訪僑臺商顯然認為臺灣於非洲仍有發展空間。相較於中國大陸企業，臺灣企業品牌口碑、追求長遠經營的態度，較中國大陸之企業更有競爭優勢。此外，受疫情影響，陸商較難返回中國大陸採購進貨，而臺商相對進出較無障礙，成為疫情經濟一大優勢。基此，受訪僑臺商認為非洲市場仍具有僑臺商投資經貿發展

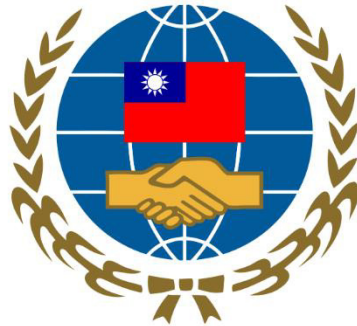
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惟目前非洲仍有不少國家較為缺乏法治觀念，並有行政效率不彰、政府效能低落之問題。因此進入非洲市場前市場評估，極為重要。此外，目前疫情影響下，疫情下宅經濟亦突顯僑臺商仍須強化電子商務平臺及供應鏈關鍵之處。

受訪僑臺商除肯定僑委會推動「非洲專案」，透過信保基金協助非洲僑臺商在疫情期間資金紓困，並建議未來可進一步採取以下政策協助作為：

1. 信保基金已發揮重要政策功能，非洲僑臺商反應積極熱烈。建議擴大信保基金規模，並適度放寬融資條件及融資對象。
2. 協助提升非洲傳統產業僑臺商技術升級：目前僑臺商於南部非洲製造業仍以傳統產業如紡織、塑膠業等為主，無論生產技術與經營模式均面臨轉型關鍵。建議未來透過連結特定傳統產業與臺灣技術機構法人技術合作對接，或適時邀請產業性質類似的僑臺商組團訪臺探求新技術、新設備與轉型新商機。
3. 非洲營商充滿商機與風險，建議透過當地臺灣商會成立「臺商服務中心」。此一服務中心可提供包含商品臺灣產品展示平臺、行銷團隊及評估資訊，以使得僑臺商協助有意進入非洲發展臺商得以完整評估商機，並且透過評估完整資訊，以降低風險。
4. 建議政府協助有意自中國大陸轉移或有意轉型的臺商，提供非洲相關投資經營市場商機資訊，並可順勢推動臺商前往非洲發展。
5. 雖然對非洲經濟復甦的預期相對較慢，然而預期非洲未來經濟穩定好轉後應呈現大幅跳躍成長。建議政府與民間可超前部署，掌握非洲市場商機。

Overseas Compatriot Business Operating Trends and Investment Environment Survey Report (Africa)



中華民國僑務委員會
Overseas Community Affairs Council
Republic of China [Taiwan]

January, 2022

Chapter 6 The Africa overseas compatriot business momentum and business environment

Section 1 Africa overseas compatriot operating situation

Of the 1,617 overseas compatriot businesses interviewed, 64 were in Africa, accounting for 4% of valid responses. Of the 64 interviewed overseas compatriot businesses in Africa, 38 are micro-enterprises, accounting for 59.4% of valid responses, followed by small enterprises at 17.2%, with large enterprises in third, accounting for 12.5%; finally, there is medium sized enterprises at 10.9%. (See Table 6-1)

Table 6-1 Scale distribution of interviewed Africa overseas compatriot businesses (Q4 2021)

Type	No. of businesses	Proportion (%)
Micro Enterprise (Less Than 50 People)	38	59.4
Small Enterprise (51-100 People)	11	17.2
Large Enterprise (More Than 500 People)	8	12.5
Medium Sized Enterprise (101-500 People)	7	10.9
Total	64	100.0

Explanation: the number in brackets is employee scale

Data source: sorted by this study

Of the 64 interviewed overseas compatriot businesses in Africa, 25 are in the manufacturing industry, accounting for 39.1% of valid responses, with most food and textiles companies, totaling 11, accounting for 44% of interviewed manufacturing industry overseas compatriot businesses; the rest were, in order, electricity, gas and water and primary industry (20%,) basic

raw materials and other manufacturing (16%), petrochemicals and bio-medical (8%,) electrical and mechanical equipment (4%,) transportation tool parts (4%,) and electronics and optical (4%). (See Table 6-2)

Table 6-2 Industry distribution of interviewed Africa manufacturing industry overseas compatriot businesses (Q4 2021)

Type	No. of businesses	Proportion (%)
Food and Textiles	11	44.0
Primary Industry and Electricity, Gas and Water	5	20.0
Basic Raw Materials And Other Manufacturing Industry	4	16.0
Petrochemicals and Bio-Medical	2	8.0
Electronics and Optical	1	4.0
Electrical and Mechanical Equipment	1	4.0
Transportation Tool Parts	1	4.0
Total	25	100.0

Data source: sorted by this study

Of the 64 interviewed overseas compatriot businesses in Africa, 39 are in the service industry, accounting for 60.9% of valid responses, with most in the wholesale and retail service industry, totaling 19 companies, accounting for 48.7% of the service industry overseas compatriot businesses interviewed; followed by other service industries, accounting for 30.8%; third is transportation and storage, construction and accommodation and food service industry, all accounting for 5.1%. (See Table 6-3)

Table 6-3 Industry distribution of interviewed Africa service industry overseas compatriot businesses (Q4 2021)

Type	No. of businesses	Proportion (%)
Other service industry	12	30.8

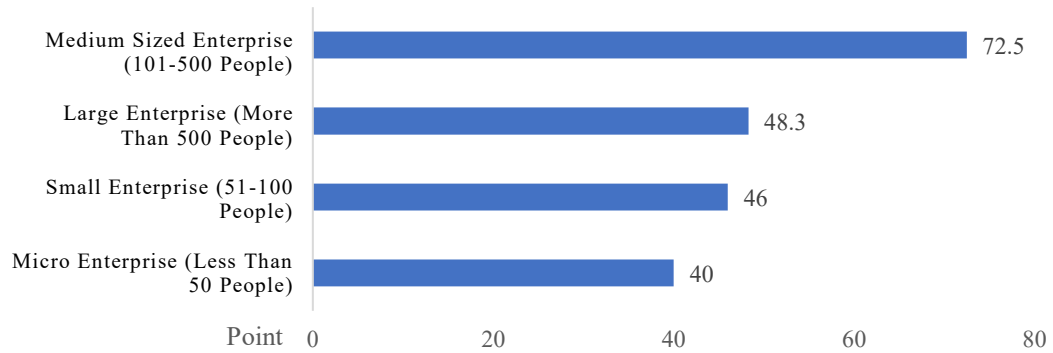
Type	No. of businesses	Proportion (%)
Wholesale and retail	19	48.7
Accommodation and food service	2	5.1
Transportation and storage	2	5.1
Construction	2	5.1
Real estate	1	2.6
Finance and insurance	1	2.6
Total	39	100.0

Data source: sorted by this study

I. Africa manufacturing industry Overseas Compatriot Business Momentum Index

In Q4 2021, the Africa manufacturing industry OC-BMI (Overseas Compatriot Business Momentum Index) was 48.4 points, below the entrepreneur confidence 50-point threshold points and at the bottom of the six continents, showing that, affected by the pandemic and political instability in various countries, Africa's economic recovery is weak. The best performing sector in Africa's manufacturing industry was medium-sized enterprises with OC-BMI of 72.5 points; large enterprises and micro enterprises were both in the contraction range, with limited difference and OC-BMI between 40 and 49 points. (See Fig. 6-1)

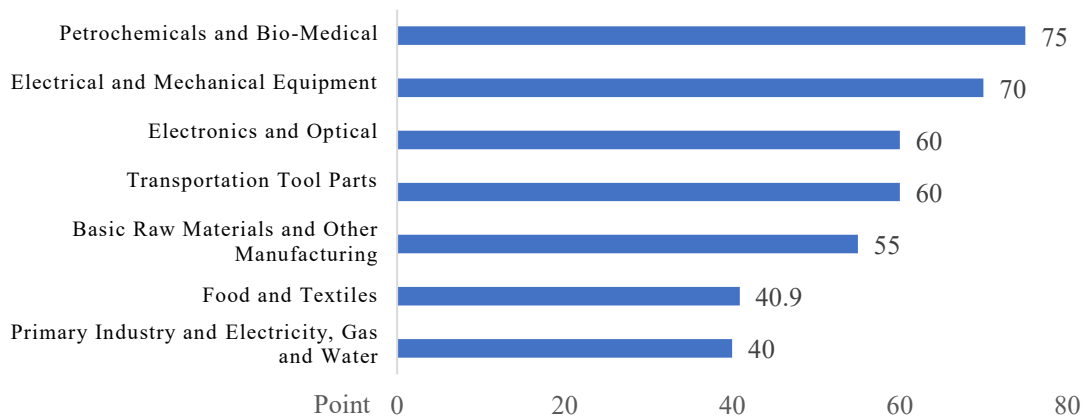
Fig. 6-1. Africa various type manufacturing industry Overseas Compatriot Business Momentum Index (Q4 2021)



Data source: sorted by this study

By industry, in Q4 2021, petrochemicals and biomedical performed best in Africa's manufacturing industry with OC-BMI of 75 points; this was followed by electrical and mechanical equipment with 70 points. Electronics and optical, transportation tool parts and basic raw materials and other manufacturing were all in the expansion stage. (See Fig. 6-2)

Fig. 6-2. Africa various industry manufacturing industry Overseas Compatriot Business Momentum Index (Q4 2021)

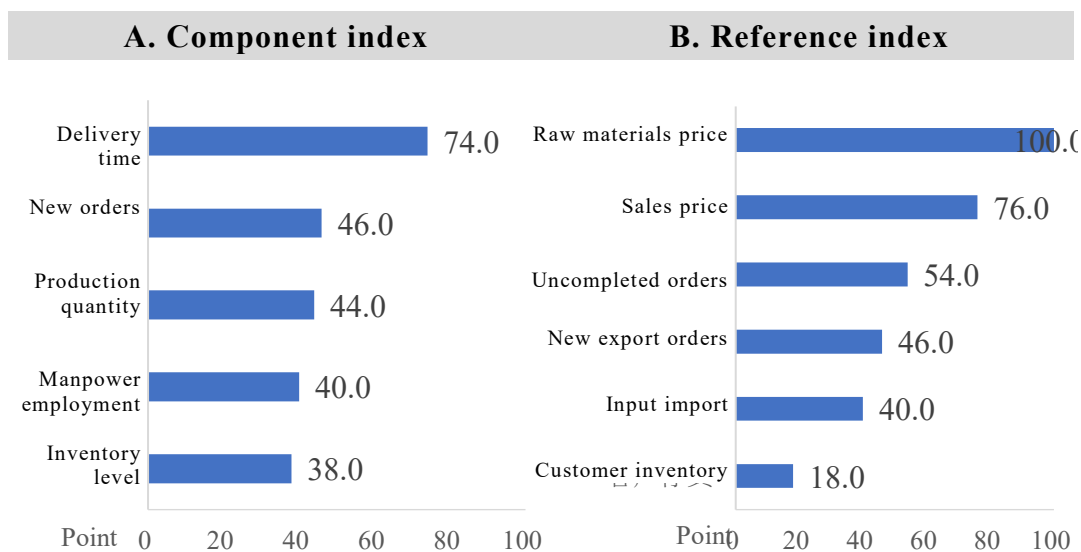


Data source: sorted by this study

In terms of component index, strong global demand plus busy shipping extended the delivery times of overseas compatriot businesses in Africa, and this was the key factor in the increase in Africa manufacturing industry OC-BMI. Also, due to the pandemic and increased political risk, most companies were unable to increase safety inventory level.

In terms of reference index, raw materials price in Africa manufacturing industry OC-BMI reached 100 points, namely, all 25 overseas compatriot businesses replied that raw materials prices had increased, showing this is a general problem faced by overseas compatriot businesses in Africa, Sales price also rose to 76 points, showing that companies are gradually passing costs to mid and downstream. (See Fig. 6-3)

Fig. 6-3 Analysis of Africa manufacturing industry Overseas Compatriot Business Momentum (Q4 2021) diffusion index



Data source: sorted by this study

The scale of Africa overseas compatriot businesses reflect their ability to withstand economic instability. In terms of component index, medium-sized enterprise production quantity, new orders and manpower employment

were 75, 87.5 and 75 points respectively, all above the entrepreneur confidence 50-point threshold. On the contrary, large and micro enterprises were within the contraction range for the three aforementioned indexes and the smallest in scale declined the most

In terms of reference index, medium sized enterprises scored over 50 points for uncompleted orders, new export orders and input import, however, customer inventory was below the entrepreneur confidence 50-point threshold. (See Table 6-4)

Table 6-4 Analysis of Africa various scale manufacturing industry Overseas Compatriot Business Momentum (Q4 2021) diffusion index

	Unit: Point			
Index	Large	Medium	Small	Micro
Component index				
Production quantity	41.7	75.0	40.0	35.0
New orders	41.7	87.5	40.0	35.0
Manpower employment	33.3	75.0	30.0	35.0
Inventory level	41.7	50.0	50.0	25.0
Delivery time	83.3	75.0	70.0	70.0
Reference index				
Customer inventory	16.7	37.5	30.0	5.0
Uncompleted orders	75.0	62.5	50.0	40.0
New export orders	25.0	50.0	50.0	55.0
Input import	33.3	62.5	40.0	35.0
Raw materials price	100.0	100.0	100.0	100.0
Sales price	83.3	100.0	60.0	70.0

Data source: sorted by this study

Finally, Africa overseas compatriot businesses in petrochemicals and bio-medical performed best, with 75 points for production quantity new orders and manpower employment in the OC-BMI component index. At the

same time, in the reference index, petrochemicals and bio-medical also scored over 75 points for uncompleted orders, new export orders and input import. In electrical equipment and electronic and optical, electrical equipment performed slightly better.

In contrast, Africa overseas compatriot businesses in the food and textile industry scored just 31.8, 31.8 and 27.3 points for production quantity, new orders and manpower employment, respectively, in the OC-BMI component index; overseas compatriot businesses in primary industry and electricity, gas and water scored 30, 40 and 30 points, well short of the entrepreneur confidence 50-point threshold. In the reference index, price was the lowest for all industries showing the intensity of competition and difficulty in passing on cost to sales price. (See Table 6-5)

Table 6-5 Analysis of Africa various industry manufacturing industry Overseas Compatriot Business Momentum diffusion index (Q4 2021)

Unit: Point

Index	Transportation Tool	Food and Textiles	Petrochemicals and Bio-Medical	Electronics and Optical	Electrical and Mechanical Equipment	Raw Materials and Others	Primary Industry and Electricity, Gas and Water
Component index							
Production quantity	50.0	31.8	75.0	50.0	100.0	62.5	30.0
New orders	50.0	31.8	75.0	50.0	100.0	62.5	40.0
Manpower employment	50.0	27.3	75.0	50.0	50.0	62.5	30.0
Inventory level	50.0	40.9	75.0	50.0	50.0	12.5	30.0
Delivery time	100.0	72.7	75.0	100.0	50.0	75.0	70.0
Reference index							
Customer inventory	0.0	13.6	25.0	50.0	50.0	0.0	30.0

Index	Transportation Tool	Food and Textiles	Petrochemicals and Bio-Medical	Electronics and Optical	Electrical and Mechanical Equipment	Raw Materials and Others	Primary Industry and Electricity, Gas and Water
Uncompleted orders	50.0	68.2	75.0	50.0	100.0	37.5	20.0
New export orders	50.0	40.9	75.0	50.0	50.0	62.5	30.0
Input import	0.0	45.5	50.0	50.0	50.0	50.0	20.0
Raw materials price	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Sales price	100.0	68.2	75.0	100.0	100.0	100.0	60.0

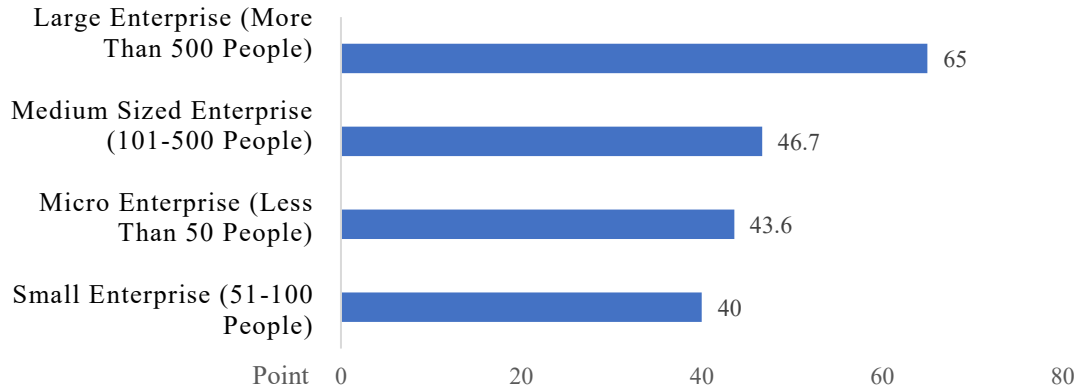
Data source: sorted by this study

II. Africa Service Industry Overseas Compatriot Business Momentum Index

The persistent global pandemic plus strict lockdown measures suppressed service industry growth. Africa service industry OC-BMI was 44.1 points, in the constriction range, however, higher than Asia's 40.6 points.

For Q4 2021 Africa service industry OC-BMI, from the angle of scale, large enterprises did best, with OC-BMI of 65 points; medium-sized, small and micro enterprises all fell into the contraction range, with limited OC-BMI difference, all between 40 and 47 points. (See Fig. 6-4)

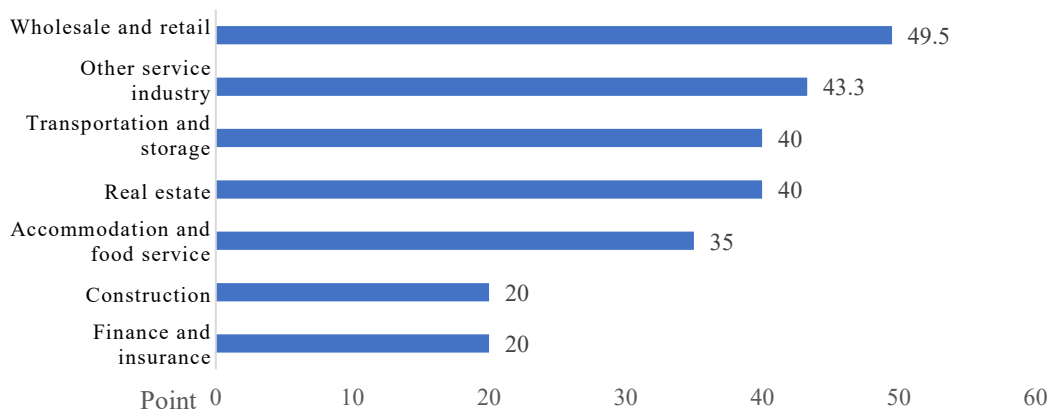
Fig. 6-4 Africa Various Type Service Industry Overseas Compatriot Business Momentum Index (Q4, 2021)



Data source: sorted by this study

In Q4 2021, all the industries in the Africa service industry fell into the contraction range; within, wholesale and retail had a OC-BMI of 49.5 points, close to the entrepreneur confidence 50-point threshold. On the contrary, the OC-BMI of construction and finance and banking was only 20 points. (See Fig. 6-5)

Fig. 6-5 Africa Various Industry Service Industry Overseas Compatriot Business Momentum Index (Q4, 2021)

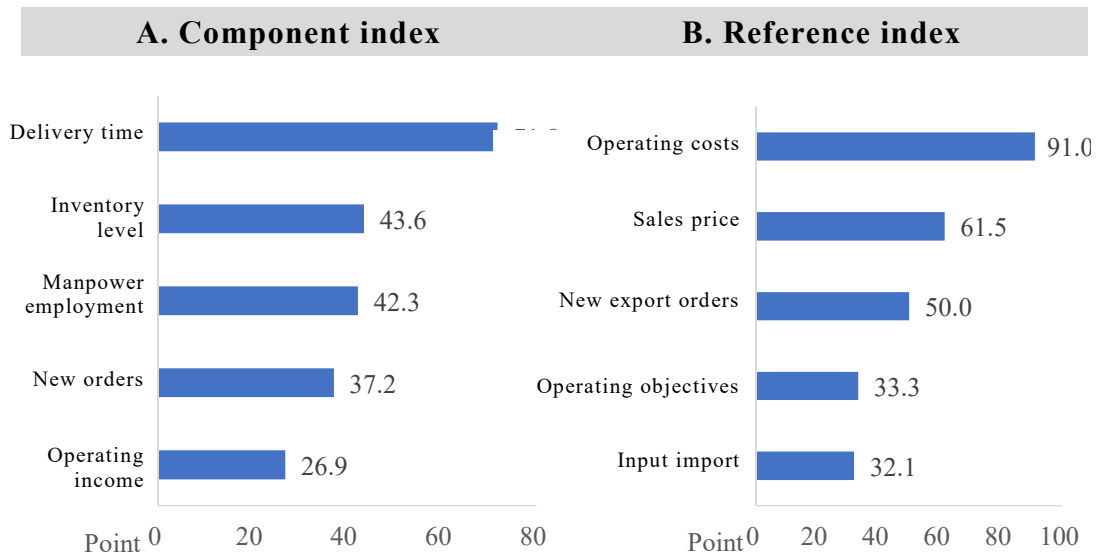


Data source: sorted by this study

Strong global demand plus busy shipping extended the delivery times of overseas compatriot businesses in the service industry in Africa, and this was the key factor in the increase in Africa service industry OC-BMI. Also, due to the persistent pandemic and increased political risk, most service industry overseas compatriot businesses saw revenue and new orders contract and were thus unable to make up manpower and inventories.

Operating costs in the OC-B reference index was 91 points, a difficulty faced by all overseas compatriot businesses. Sales price also climbed to 61.5 points, showing that companies are gradually passing on costs to the end consumer. Affected by the pandemic, overseas compatriot businesses in the service industry generally reduced input import and operating targets. (See Fig. 6-6)

Fig. 6-6 Analysis of Africa Service Industry Overseas Compatriot Business Momentum diffusion index (Q4, 2021)



Data source: sorted by this study

The scale of Africa service industry overseas compatriot businesses reflects their ability to withstand economic turbulence. Apart from large, medium-sized and small enterprises reaching 50 points, above the entrepreneur confidence 50-point threshold, in the OC-BMI component index for manpower employment, operating income and new orders were under 50 points for all; for production quantity, new orders and manpower employment, micro enterprises were under the entrepreneur confidence 50-point threshold and in the contraction range, also showing that the smaller the scale, the fewer points businesses scored for manpower employment. (See Table 6-6)

Table 6-6 Analysis of Africa Various Scale Service Industry Overseas Compatriot Business Momentum diffusion index (Q4, 2021)

Unit: Point				
Type	Large	Medium	Small	Micro
Component index				
Operating income	25.0	16.7	16.7	30.4
New orders	25.0	0.0	41.7	41.1
Manpower employment	100.0	50.0	50.0	35.7
Inventory level	100.0	83.3	25.0	39.3
Delivery time	75.0	83.3	66.7	71.4
Reference index				
Operating objectives	25.0	16.7	41.7	33.9
New export orders	75.0	50.0	50.0	48.2
Input import	75.0	33.3	16.7	32.1
Operating costs	100.0	100.0	83.3	91.1
Sales price	100.0	66.7	41.7	62.5

Data source: sorted by this study

Finally, Africa overseas compatriot businesses in finance and insurance and accommodation and food service did quite well, with operating income and new orders both at 50 points. Accommodation and food service also achieved 50 points for operating targets and new export orders, better than

other industries in the sector, followed closely by finance and insurance. (See Table 6-7)

Table 6-7 Analysis of Africa Various Industry Service Industry Overseas Compatriot Business Momentum diffusion index (Q4, 2021)

Unit: Point

Type	Distribution	Finance	Construction	Property	Accommodat Food And	Wholesale	Other
Component index							
Operating income	0.0	50.0	25.0	0.0	50.0	26.3	29.2
New orders	25.0	50.0	25.0	0.0	50.0	39.5	37.5
Manpower employment	50.0	0.0	50.0	50.0	25.0	47.4	37.5
Inventory level	50.0	0.0	0.0	100.0	25.0	55.3	33.3
Delivery time	75.0	0.0	50.0	50.0	25.0	78.9	79.2
Reference index							
Operating targets	0.0	0.0	50.0	50.0	50.0	42.1	20.8
New export orders	50.0	50.0	50.0	50.0	50.0	50.0	50.0
Input import	25.0	50.0	25.0	50.0	25.0	21.1	50.0
Operating costs	100.0	0.0	100.0	100.0	100.0	97.4	83.3
Price	75.0	0.0	50.0	50.0	50.0	68.4	58.3

Explanation: Distribution= Transportation and Storage, Finance=Finance and Insurance. Construction=Construction Engineering, Property=Real Estate, Food and Accommodation =Accommodation and Food Service. Wholesale= Wholesale and Retail. Other=Other Sales Industry

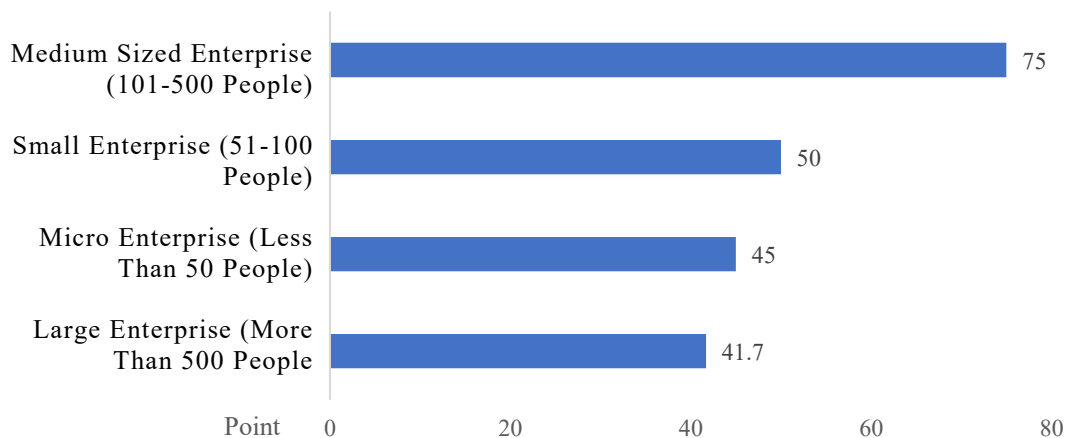
Data source: sorted by this study

Section 2. Africa overseas compatriot business expectation overview

I. Africa manufacturing industry Overseas Compatriot Business Expectation Index

In Q4 2021, Africa manufacturing industry OC-BEI was 50 points, on the entrepreneur confidence 50-point threshold and only higher than the 44 points of Oceania. Of Africa manufacturing industry overseas compatriot businesses, medium-sized enterprises had most confidence with OC-BEI of 75 points. Small enterprises were on the entrepreneur confidence 50-point threshold; large enterprises and micro enterprises expect the business cycle to continue to contract, with limited difference between them and OC-BEI between 41 and 45 points. (See Fig. 6-7)

Fig. 6-7 Africa various type manufacturing industry Overseas Compatriot Business Expectation Index (Q4, 2021)

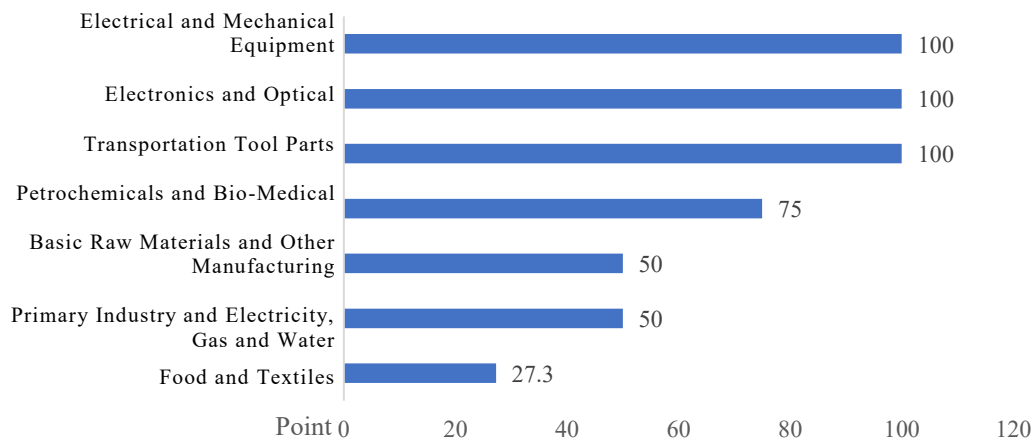


Data source: sorted by this study

In Q4 2021, the OC-BEI of Africa electrical and mechanical machinery, electronics and optical and transport tool parts OC-BEI were all 100 points and petrochemicals and biomedical, basic raw materials and other manufacturing and primary industry and electricity, gas and water expected

the business cycle to warm up. (See Fig. 6-8)

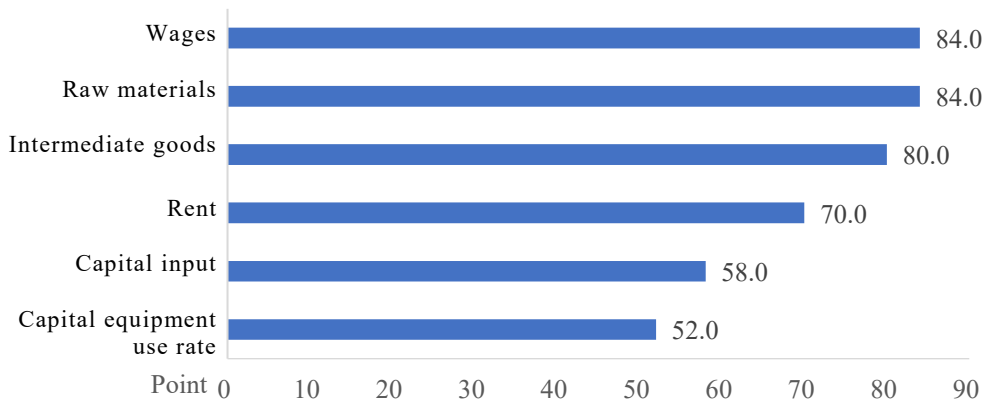
Fig. 6-8 Africa various industry manufacturing industry Overseas Compatriot Business Expectation Index (Q4, 2021)



Data source: sorted by this study

The Africa manufacturing industry OC-BEI reference index points out that wages, prices of raw materials and intermediate goods and rents are expected to increase, showing that companies are generally worried about rising costs, and this is probably the key factor pushing up manufacturing industry OC-BEI. Manufacturing industry overseas compatriot businesses expect that capital equipment use rate will fall into the pessimistic expectation area, which shows that enterprises are tending to reduce capacity in response to rising costs. (See Fig. 6-9)

Fig.6-9 Analysis of Africa Manufacturing Industry Overseas Compatriot Business Expectation diffusion index (Q4, 2021)



Data source: sorted by this study

The main pressures faced by Africa manufacturing industry large, small and micro overseas compatriot businesses are increases in the price of bulk raw materials and energy, while the main pressure faced by medium sized enterprises is increase in wages. Manufacturing industry overseas compatriot businesses also expect that the increase trend will spread to intermediate goods. However, there are some signs that business expectation of manufacturing industry overseas compatriot businesses differs, the best example being that the wage stress tolerance of large and medium sized enterprises is better than that of small and micro enterprises, making them more willing to input capital and increase capital equipment use rate. (See Table 6-8)

Table 6-8 Analysis of Africa Various Scale Manufacturing Industry Overseas Compatriot Business Expectation diffusion index (Q4, 2021)

Unit: Point

Type	Large	Medium	Small	Micro
Raw materials	91.7	62.5	90.0	85.0
Intermediate goods	83.3	75.0	80.0	80.0
Wages	83.3	87.5	90.0	80.0

Type	Large	Medium	Small	Micro
Rent	83.3	62.5	70.0	65.0
Capital input	83.3	100.0	30.0	40.0
Capital equipment use rate	66.7	75.0	40.0	40.0

Data source: sorted by this study

Lastly, expectations of Africa's overseas compatriot businesses in electronics and optical manufacturing were most optimistic, with 100 points for both capital input and capital equipment use rate. Second, capital input and capital equipment use rate of transport tool parts, petrochemicals and biomedicine, electrical and mechanical equipment, raw material and other manufacturing are all above 50 points. Lastly are food and textiles, primary industry and electricity, gas and water, with capital input and capital equipment use rate below the entrepreneur confidence 50-point threshold. (See Table 6-9)

Table 6-9 Analysis of Africa Various Industry Manufacturing Industry Overseas Compatriot Business Expectation diffusion index (Q4, 2021)

Unit: Point

Type	Transportation Tool	Food and Textiles	Petrochemicals and Biomedicine	Electronics Optical	Electrical Equipment	Raw Materials and Other	Primary Industry and Electricity, Gas and Water
Raw materials	0.0	81.8	100.0	100.0	50.0	87.5	100.0
Intermediate goods	0.0	77.3	75.0	100.0	50.0	100.0	90.0
Wages	50.0	90.9	75.0	50.0	50.0	87.5	90.0
Rent	50.0	81.8	50.0	50.0	50.0	62.5	70.0
Capital input	50.0	54.5	50.0	100.0	100.0	62.5	50.0

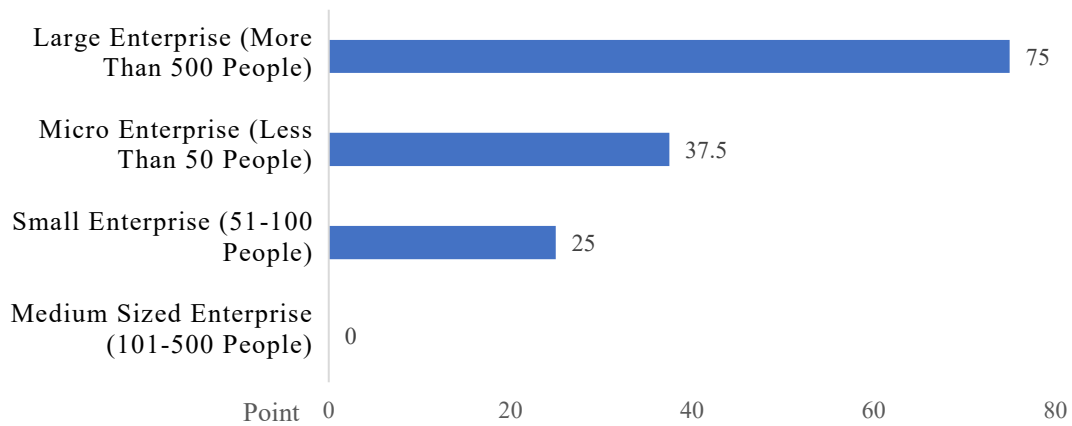
Type	Transportation Tool	Food and Textiles	Petrochemicals and Biomedicine	Electronics Optical	Electrical Equipment	Raw Materials and Other	Primary Industry and Electricity, Gas and Water
Capital equipment use rate	100.0	40.9	75.0	100.0	50.0	62.5	40.0

Data source: sorted by this study

II. Africa overseas compatriot business service industry Business Expectation Index

Due to the persistent pandemic and shadow over economic recovery, domestic demand momentum was limited, the Africa service industry OC-BEI was 34.6 points, and it is expected contraction will continue to the next quarter and bring up the rear globally. In Q4 2021, of Africa service industry overseas compatriot businesses, large enterprises were most confident, with OC-BEI of 75 points. Micro, small and medium enterprises expect the business cycle to continue to contract; the OC-BEI of medium-sized enterprises is close to zero, fully showing worries about the future economy. (See Fig. 6-10)

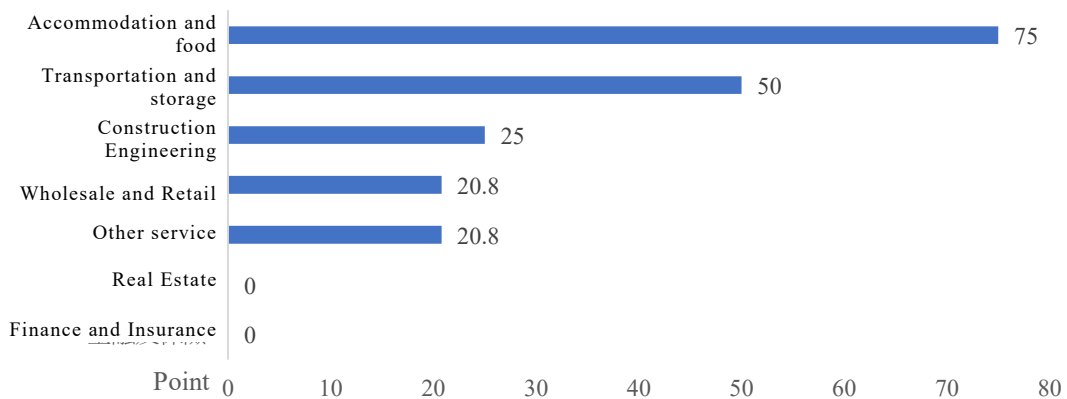
Fig. 6-10 Africa various type service industry Overseas Compatriot Business Expectation Index (Q4, 2021)



Data source: sorted by this study

In Q4 2021, Africa overseas compatriot businesses in accommodation and food service and transportation and storage expect the business cycle to expand; the remaining industries are highly pessimistic, with each having OC-BEI below 30 points, well below the entrepreneur confidence 50-point threshold. (See Fig. 6-11)

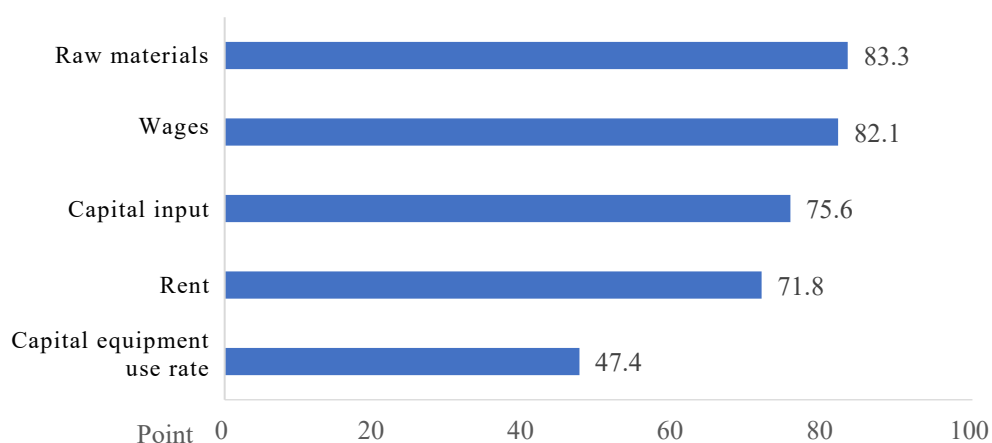
Fig. 6-11 Africa various industry service industry Overseas Compatriot Business Expectation Index (Q4, 2021)



Data source: sorted by this study

The Africa service industry OC-BEI reference index points out that wages, prices of raw materials, intermediate goods and rents are expected to rise, showing that companies are generally worried about cost rises and this is probably the key actor pushing up the service industry OC-BEI. (See Fig. 6-12)

Fig. 6-12 Analysis of Africa Service Industry Overseas Compatriot Business Expectation diffusion index (Q4, 2021)



Data source: sorted by this study

The main pressures faced by large overseas compatriot businesses in the service industry are wages and rent; the main pressure faced by medium, small and micro enterprises is wages; micro enterprises also face pressure from the increase in the price of international bulk raw materials and energy. For capital input, large and medium sized enterprises had the most optimistic expectation, while large enterprises had the best capital equipment use rate, followed by small enterprises. The capital equipment use rate of medium-sized and micro enterprises in the service industry was below the entrepreneur confidence 50-point threshold. (See Table 6-10)

Table 6-10 Analysis of Africa Various Scale Service Industry Overseas Compatriot Business Expectation diffusion index (Q4, 2021)

Type	Unit: Point			
	Large	Medium	Small	Micro
Raw materials	75.0	66.7	66.7	89.3
Wages	100.0	83.3	83.3	80.4
Rent	100.0	50.0	50.0	76.8
Capital input	100.0	100.0	83.3	69.6
Capital equipment use rate	75.0	33.3	50.0	46.4

Data source: sorted by this study

Lastly, Africa overseas compatriot businesses in transportation and storage and accommodation and food service had the most optimistic future expectation, all scoring 100 points for capital input and over 75 points for capital equipment use rate. Other service industry scored 66.7 points for capital input and capital equipment use rate was also over 50 points.

The real estate industry scored 100 points for capital input, while wholesale and retail had 78.9 points, however, capital equipment use rate is in the pessimistic expectation area. (See Table 6-11)

Table 6-11 Analysis of Africa Various Industry Service Industry Overseas Compatriot Business Expectation diffusion index (Q4, 2021)

Type	Unit: Point						
	Distribution	Finance	Construction	Property	Accommodat	Food and	Wholesale
Raw materials	100.0	50.0	75.0	0.0	75.0	81.6	95.8
Wages	50.0	100.0	75.0	50.0	75.0	86.8	83.3

Type	Distribution	Finance	Construction	Property	Accommodat	Food and	Wholesale	Other
Rent	100.0	0.0	75.0	0.0	50.0	71.1	83.3	
Capital input	100.0	50.0	50.0	100.0	100.0	78.9	66.7	
Capital equipment use rate	75.0	0.0	25.0	0.0	75.0	44.7	54.2	

Explanation: Distribution= transportation and storage, Finance=finance and insurance. Construction=construction engineering. Property=real estate. Accommodation and food=Accommodation and food service. Wholesale= Wholesale and retail. Other= other sales industry

Data source: sorted by this study

Section 3 Africa Overseas Compatriot Business Environment Overview

I. Africa manufacturing industry Overseas Compatriot Doing Business Index

Of the 15 component indexes of the Africa manufacturing industry Overseas Compatriot Doing Business Index, only partner and labor-management dispute is over the worsened proportion, with weighted average of 52 points, higher than the 50 point threshold. The remaining 14 indexes deteriorated to different extents. The five indexes that deteriorated the most were law and order, customs formalities, administrative efficiency, profit outward remittance efficiency and tax or tariff. These are all directly related to the administrative effectiveness of the host country. (See Table 6-12)

Table 6-12 Analysis of Africa manufacturing industry overseas compatriot business environment (Q4, 2021)

Type	Improved (%)	Worsened (%)	Same (%)	Score (Points)
Partner and labor-management dispute	20.0	16.0	64.0	52.0
Opening of investment projects	20.0	28.0	52.0	46.0
Infrastructure	16.0	32.0	52.0	42.0
Manpower quality	12.0	28.0	60.0	42.0
Loan recycling efficiency	0.0	50.0	80.0	40.0
Regulations	8.0	32.0	60.0	38.0
Friendliness of living environment	12.0	40.0	48.0	36.0
Market scale and growth prospects	12.0	40.0	48.0	36.0
Pressure from competitors	8.0	36.0	56.0	36.0
Convenience of finance	0.0	44.0	56.0	28.0
Tax or tariff	0.0	44.0	56.0	28.0
Profit outward remittance efficiency	0.0	48.0	52.0	26.0
Administrative efficiency	12.0	64.0	24.0	24.0
Customs formalities	4.0	64.0	32.0	20.0
Law and order	8.0	68.0	24.0	20.0

Data source: sorted by this study

II. Africa service industry Overseas Compatriot Doing Business Index

Of the 15 component indexes of the Africa service industry Overseas Compatriot Doing Business Index, only the improved proportion of opening of investment projects equals the worsened proportion, with weighted average of 50 points, at the entrepreneur confidence 50-point threshold. The remaining 14 indexes deteriorated to different extents. The five indexes that deteriorated the most were law and order, customs formalities, competitor pressure, profit outward remittance efficiency and administrative efficiency. Apart from outward remittance efficiency, these are all directly related to the administrative effectiveness of the host country. As more importance is attached to the Africa market by various countries, competitor pressure has also intensified. (See Table 6-13)

Table 6-13 Analysis of Africa service industry overseas compatriot business environment (Q4, 2021)

Type	Improved (%)	Worsened (%)	Same (%)	Score (Points)
Opening of investment projects	28.2	28.2	43.6	50.0
Manpower quality	10.3	20.5	69.2	44.9
Partner and labor-management dispute	7.7	23.1	69.2	42.3
Friendliness of living environment	12.8	33.3	53.8	39.7
Infrastructure	17.9	38.5	43.6	39.7
Market scale and growth prospects	17.9	43.6	38.5	37.2
Convenience of finance	12.8	41.0	46.2	35.9
Loan recycling efficiency	2.6	35.9	61.5	33.3

Type	Improved (%)	Worsened (%)	Same (%)	Score (Points)
Tax or tariff	5.1	46.2	48.7	29.5
Regulations	5.1	46.2	48.7	29.5
Administrative efficiency	15.4	59.0	25.6	28.4
Profit outward remittance efficiency	7.7	53.8	38.5	26.9
Competitor pressure	0.0	51.3	48.7	24.4
Customs formalities	2.6	56.4	41.0	23.1
Law and order	7.7	69.2	23.1	19.2

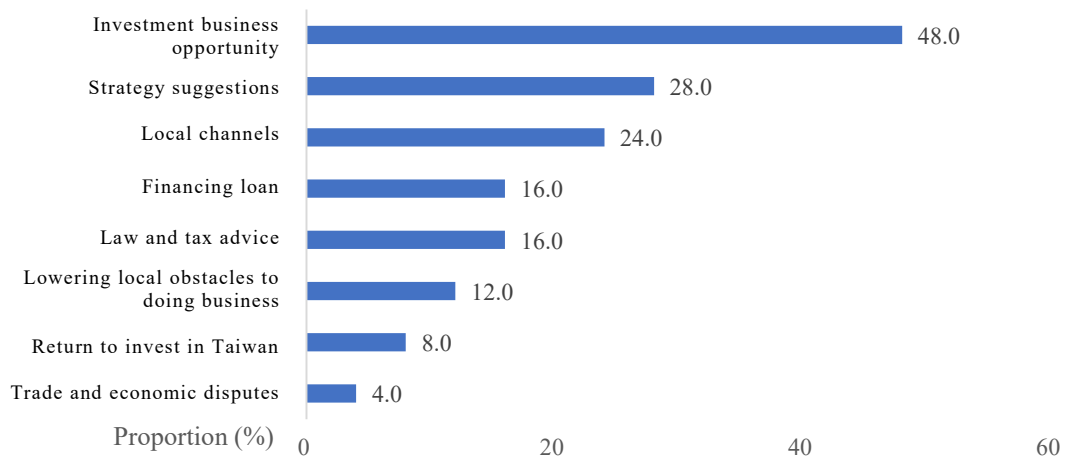
Data source: sorted by this study

Section 4 Africa overseas compatriot use of overseas mission resources and future requirements

I. Africa overseas compatriot business use of overseas mission resources

In order, Africa overseas compatriot business use of overseas mission resources was for obtaining domestic and overseas investment business opportunity information (48%), provision of international political situation analysis and investment strategy suggestions (28%) and establishing of local channels (24%). (See Fig. 6-13)

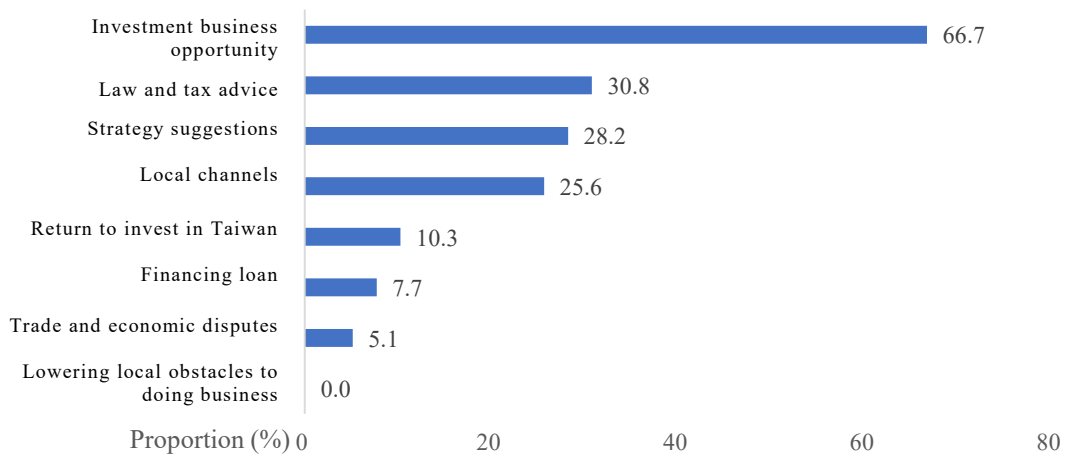
Fig. 6-13. Africa manufacturing industry overseas compatriot business use of overseas mission resources proportion (Q4, 2021)



Data source: sorted by this study

In order, Africa overseas compatriot business use of overseas mission resources was for obtaining domestic and overseas investment business opportunity information (66.7%), local law and tax related issue advice(30.8%), provision of international political situation analysis and investment strategy suggestions (28.2%). (See Fig. 6-14)

Fig. 6-14. Africa service industry overseas compatriot business use of overseas mission resources proportion (Q4, 2021)



Data source: sorted by this study

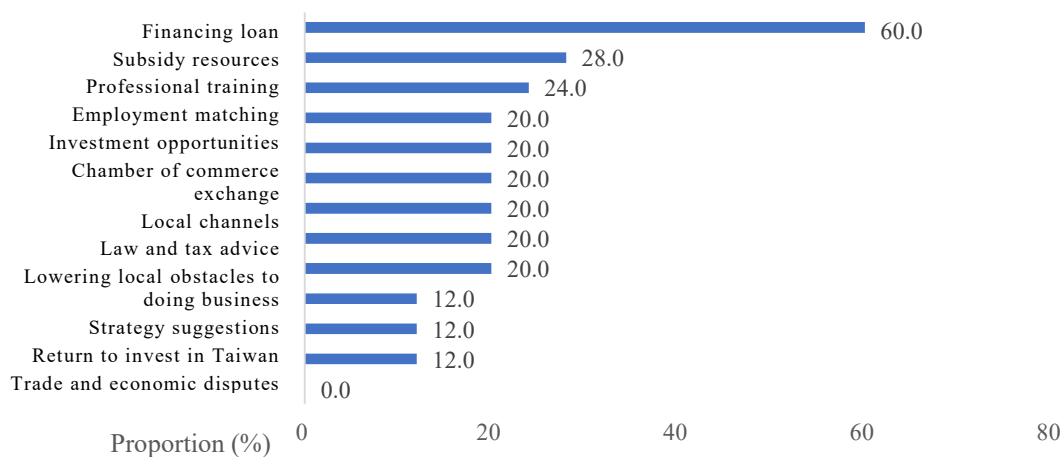
The results of the survey on use of overseas mission resources by Africa overseas compatriot businesses shows “Domestic and overseas investment business opportunity information” is the resource most often used, with service industry use rate of 66.7% and 48% for manufacturing industry. “International political situation analysis and investment strategy suggestions” and “Expanding local channels” were also overseas mission services often used by Africa manufacturing and service industry overseas compatriot businesses, with use proportion over 20%. For “Local law and tax related issue advice,” the requirement proportion of service industry overseas compatriot businesses (30.8%) was higher than manufacturing industry (16%).

II. Suggestions on future requirements of Africa overseas compatriot businesses

For items that Africa manufacturing industry overseas compatriot

businesses hope they can receive policy assistance in future, loans to such businesses had highest priority, with a proportion of 60%. Other required assistance and services included subsidies, professional training, employment matching, chamber of commerce exchange, lowering local obstacles to doing business, advice on local law and tax related issues, local channel and investment opportunities, between 20% and 30%. (See Fig. 6-15)

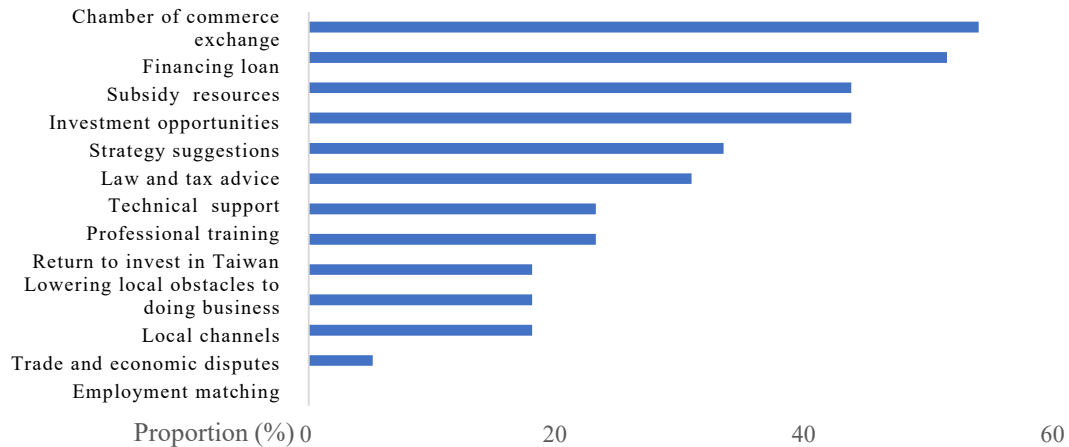
Fig. 6-15. Africa manufacturing industry overseas compatriot business overseas mission resources requirement proportion (Q4, 2021)



Data source: sorted by this study

For items that Africa service industry overseas compatriot businesses hope they can receive policy assistance in future, chamber of commerce platform exchange had highest priority, with a proportion of 53.8%, followed by loans with 51.3%. Third was subsidy resources and domestic and overseas investment business opportunity information, both on 43.6%. (See Fig. 6-16)

Fig. 6-16. Africa service industry overseas compatriot business overseas mission resources requirement proportion (Q4, 2021)



Data source: sorted by this study

Summing up the results of the survey, the main requirement for Africa manufacturing and service industry overseas compatriot businesses for overseas mission resources in the future is “Obtaining loans,” over 50% for both. Apart from 60% requirement for loans by manufacturing industry, requirement for other resource items was below 30%; the resource most important to service industry businesses was “Chamber of Commerce platform exchange,” while requirement for Loans, Subsidy resources, Domestic and overseas investment business opportunity information and advice on local law and tax related issues was over 40%.

Of the resources requirements, Africa manufacturing and service industry overseas compatriot businesses had different requirements due to the characteristics of each industry; the strong requirements for Chamber of Commerce platform exchange of service industry businesses (53.8%) is probably related to the fact that chambers of commerce have traditionally been platforms for bringing together overseas compatriot businesses on which they can mutually support and exchange market business

opportunities to meet the rapid changes in the service industry. As for the manufacturing industry, as international supply chains have moved to all corners of the globe, one of the main service requirements of overseas compatriot businesses is technical talent; service industry overseas compatriot businesses have no requirement for local employment matching.

III. Suggestions on future overseas mission resources requirements of Africa overseas compatriot businesses

Africa has a big market and huge population; the economy is gradually developing and the huge consumer market is attracting attention around the world. Overseas compatriot businesses have operated in South Africa for many years and 340 million population West Africa and Central Africa are full of business opportunities. According to this study's figures, in Q4 2021, the OC-BMI of manufacturing industry overseas compatriot businesses was 48.4 points, while for the service industry it was 44.1 points, bringing up the rear of the six continents and showing the negative impact on Africa of the pandemic.

Overall, there is a fairly high proportion of labor intensive work in Africa and the pandemic caused reduction on the flow of people and businesses activities, with people facing reduced incomes or unemployment; adding substantial price rises for food, some places in Africa saw famine and poverty. Luckily, Africa has a young population and although the infection rate was quite high, no collapse in the health system has occurred.

The OC-BEI of Africa manufacturing overseas compatriot businesses was 50 points, with 34.6 for the service industry, showing that such businesses are conservative in their expectation for the future business cycle in Africa. However, in the interviewees, it was obvious that overseas compatriots believe there is still room for growth in Africa. Compared to mainland China's enterprises, Taiwan's business brands have a good

reputation and pursue long-term operation, giving them advantages over mainland enterprises. Also, in the pandemic, mainland businesses found it hard to return to China to replenish supplies, whereas it was relatively easy for Taiwanese entrepreneurs to come and go, giving them a big advantage. Based on these factors, the interviewed overseas compatriot enterprises thought there is still space for overseas compatriot business to invest in and do business in Africa.

However, some countries in Africa still lack rule of law and have poor administrative efficiency and government effectiveness. It is thus very important to carry out assessment before entering the Africa market. Also, amidst the pandemic, the home economy shows that overseas compatriot businesses must enhance e-commerce platforms and key points on supply chains.

The interviewed overseas compatriot enterprises praised the OCAC's "Africa Program" for providing relief funding to such businesses in Africa during the pandemic from the credit guarantee fund and suggest in future the following measures can be taken:

1. The credit guarantee fund has played an important policy role and has been welcomed very positively by overseas compatriot businesses in Africa. It is suggested that the credit guarantee fund is expanded and requirements for loan conditions and subjects suitably relaxed.
2. Assist overseas compatriot business in traditional industry in Africa with technological upgrading: In Southern Africa, overseas compatriot businesses are still mainly in traditional industries such as textiles and plastics and in need of transformation in terms of production technology and operating model. It is suggested, in future, technical cooperation between specific traditional industries and Taiwan technical institutions can be arranged or overseas compatriot businesses in similar industries invited to organize groups to visit

Taiwan to search for new technology, new equipment and new business opportunities for transformation.

3. Doing business in Africa is full of opportunity and risk. It is suggested that a Taiwanese Business Service Center is set up through local Taiwanese chambers of commerce. This service center can serve as a display platform for Taiwan products, and provide a marketing team and assessment information to allow overseas compatriots businesses to assist Taiwanese businesses interested in entering the Africa market to carry out full assessment of business opportunities to reduce risk.
4. It is suggested that the government assist Taiwanese businesses that are interested in relocating from China or transforming by providing information on investing in and doing business in Africa and can, in doing so, promote the move into Africa of Taiwanese businesses.
5. Although it is expected that Africa's economic recovery will be slow, it is expected to see a great leap in terms of growth once it stabilizes. It is suggested that government and the private sector deploy in advance to take advantage of business opportunities in Africa.