START A NEW BUSINESS OF KOREA ECONOMIC : IRAN

한-이란 비즈니스 포럼

Korea - Iran Business Forum

2016년 한국 경제의

새로운시작:이란

2016.7.25(월) 14:0~18:30

부산 롯데호텔 3층 크리스탈볼룸



주최 KMI 한국해양수산개발원 KOREA MARITIME INSTITUTE 부산상공회의소 주관 UMICE

후원 해양수산부, 부산광역시, KOTRA, 이스파한 대학교, 이스파한 상공회의소, 이란항만해사청, 이란국영선사, 이란 재정경제부, 이란투자청, 샤히드 베헤스티 대학교, 이화여자대학교, 강원대학교, 부산대학교, 시스탄앤발루체스탄 국립지식인협회, 명지대학교, 부산항만공사, 한국해양산업협회, 한국무역협회 부산지역본부, 부산경제진흥원, 부산지식서비스융합협회, 부산미래전략캠퍼스

■ 프로그램

July 25(Mon), 2016			
13:30~14:00	**현장 등록**		
본 행사			
14:00~14:05	**개회사** – 김성귀 원장		· 한국해양수산개발원
14:05~14:15	**환영사** – 송정석 부회장		· 부산상공회의소
14:15~14:25	**축 사** – 모하맛 사에드 네자드 청장 – 홍성화 국제관계대사 – 후샹 탈레비 총장		· 이란 항만해사청 · 부산시청 · 이스파한 대학교
14:25~14:30	**기념 촬영**		
세션 1 : 한–이란 경제 협력 방안			
14:30~14:50	**주제 1. 이란의 외국인 투자 제도** – 아맛 자말리 해외 투자 국장		· 이란 투자개발청
14:50~15:10	**주제 2. 이란 경제, 180일의 변화** – 세예드 코메일 타예비 교수 – 메디 야즈다니 교수		· 이스파한 대학교 · 샤히드 베헤스티 대학
15:10~15:30	**주제 3. 한–이란 경제 협력 방안** – 최병일 교수		· 이화여자대학교
15:30~15:50	**주제 4. 이란 항만 투자 비즈니스** – 압바스 아랍마자르 대학원장 – 메디 야즈다니 교수		· 샤히드베헤쉬티대학교 정경대학원 · 샤히드 베헤스티 대학교
15:50~16:20	**토론 및 질의 응답**	▸ **좌장 :** 구정모 교수	· 강원대학교
		▸ **토론자 :** –패널1(한국) : 김영재 교수 –패널2(이란) : 모사옙 팔라바니 –패널3(한국) : 김태황 교수	· 부산대학교 · 시스탄앤발루체스탄 국립지식인협회장 · 명지대학교
16:20~16:30	**휴 식** 커피브레이크 운영		
세션 2 : 한–이란 해양수산 협력 방안			
16:30~16:50	**주제 1. 이란 항만 개발과 협력** – 모하맛 사에드 네자드 청장		· 이란 항만해사청
16:50~17:10	**주제 2. 이란 해양산업과 해양과학기술** – 모하맛 사에드 세이프 국장		· 이란 해양산업개발국
17:10~17:30	**주제 3. 한·이란 해운 물류 협력** – 모하맛 알리 하싼자데 센터장		· 이란 항만해사청 전략조사연구센터
17:30~17:50	**주제 4. 한–이란 수산업 협력** – 호세인 알리 압돌해이 부청장		· 이란 수산청
17:50~18:20	**토론 및 질의 응답**	▸ **좌장 :** 이강기 교수	· 해양대학교
		▸ **토론자 :** – 패널1(한국): 강부원 실장 – 패널2(한국): 김한울 사무관 – 패널3(한국): 이윤호 과장 – 패널4(한국): 권준영 박사 – 패널5(한국): 가셈 가유르 자마케쉬 선장	 · 부산항만공사 · 해양수산부 양식산업과 · KIOST · 해양수산부 항만투자협력과 · 이란국영선사
18:20~18:30	**폐회식**		

■ PROGRAM

July 25(Mon), 2016			
13:30~14:00	**Registration**		
Opening Ceremony			
14:00~14:05	**Opening Remarks** - Sung-Gwi Kim		- President, Korea Maritime Institute
14:05~14:15	**Welcome Remarks** - Jung-Suk Song		- Vice President, Busan Chamber of Commerce and Industry
14:15~14:25	**Congratulatory Speech** - Mohammad Saeed Nejad		- Deputy Minister and the Managing Director, Ports and Maritime Organization
		- Seong Hoa Hong	- Ambassador for International Relations, Busan Metropolitan City Hall
		- Hooshang Talebi Habibadadi	- President, University of Isfahan
14:25~14:30	**Photos**		
Session 1: Enhancing Iran-Korea Economic Cooperation in the Post Sanctions Era			
14:30~14:50	*Presentation 1.* **Foreign Investment in Iran** - Ahmad Jamali		- General Director for Foreign Investment, Organization for Investment Economic and Technical Assistance of Iran
14:50~15:10	*Presentation 2.* **Enhancing Economic Cooperation between Korea and Iran** ***- What Has Changed in Iran in the Post-Sanctions Era? -*** - Seyed Komail Tayebi - Mehdi Yazdani		- Professor, University of Isfahan - Professor, Shahid Beheshti University
15:10~15:30	*Presentation 3.* **Economic Cooperation Between Korea and Iran** - Byung-il Choi		- Professor, Ewha Womans University
15:30~15:50	*Presentation 4.* **The Capacity of Investment in Iranian Port Sites** - Abbas Arabmazar - Mehdi Yazdani		- Dean, Faculty of Economics and Political Sciences, Shahid Beheshti University - Professor, Shahid Beheshti Universit
15:50~16:20	**Discussion, Q&A**	▸ **Moderator :** Chung Mo Koo	- Professor, Kangwon National University
		▸ **Panelists :** - Panel1(Korea) : Young Jae Kim - Panel2(Iran) : Mosayeb Pahlavani - Panel3(Korea) : Taehwang Kim	- Dean, College of Economics and International Trade, Pusan National University - President, Sistan & Baluchestan National Elites Foundation - Professor, Myongji University
16:20~16:30	**Coffee Break**		

Session 2: Korea-Iran Cooperation in Maritime and Port Industries			
16:30~16:50	*Presentation 1.* **Maritime Transport in IRAN & Investment Opportunities** - Mohammad Saeed Nejad		- Deputy Minister and the Managing Director, Ports and Maritime Organization
16:50~17:10	*Presentation 2.* **I.R.of IRAN Maritime Industries** ***Capabilities, Potentials and Future plans*** - Mohammad Saeed Seif		- Director, Marine Industries Technology Development Council, Vice-Presidency for Science and Technology
17:10~17:30	*Presentation 3.* **Setting up and Strategic Cooperation in Maritime Research & Training between PMO and KMI** - Mohammad Ali Hasanzadeh		- Director General, Centre of Strategic Studies and Investigation, Port and Maritime Organization
17:30~17:50	*Presentation 4.* **Fishery and Aquaculture development in Iran** - Hossein Ali Abdolhay		- Vice President, Iran Fisheries Organization in Aquaculture
17:50~18:20	**Discussion, Q&A**	▸ **Moderator** : Kang Ki Lee	- Professor, Korea Maritime and Ocean University
		▸ **Panelists** : - Panel1(Korea) : Bu Won Kang	- Director, Busan Port Authority
		- Panel2(Korea) : Kim Han Ul	- Deputy Director, Ministry of Oceans and Fisheries
		- Panel3(Korea) : Youn Ho Lee	- Doctor, Korea Institute of Ocean Science & Technology
		- Panel4(Korea) : June Young Kwon	- Manager, Ministry of Oceans and Fisheries, Aquaculture Industry Division
		- Panel5(Korea) : Ghasem Ghayour Zamhmatkesh	- Doctor, Korea Institute of Ocean Science & Captain, Islamic Republic of Iran Shipping Lines
18:20~18:30	**Closing Ceremony**		
18:30	**Gala Dinner for Delegation**		

세션1

한·이란경제협력 방안

Session 1

Enhancing Iran-Korea Economic Cooperation in the Post Sanctions Era



주제1

이란의 외국인 투자 제도

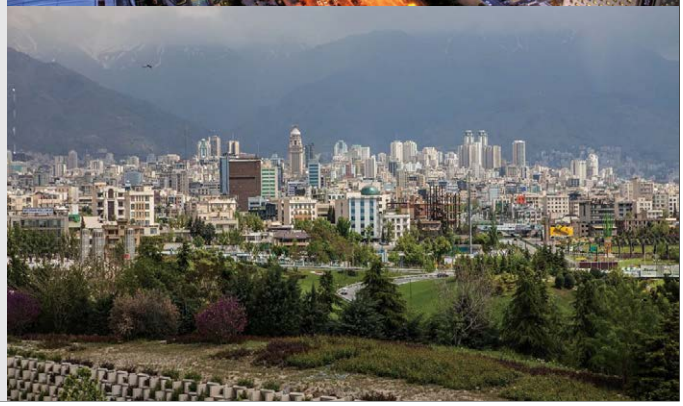
Presentation 1

Foreign Investment in Iran

- Ahmad Jamali
(General Director for Foreign Investment,
Organization for Investment Economic and Technical Assistance of Iran)

Foreign Investment in Iran





Organization for Investment, Economic and Technical Assistance of Iran (OIETAI)

Dr. Ahmad Jamali
General Director of Foreign Investment

South Korea, Busan, July 2016

Outline



- **Why Invest in I.R.IRAN**
- **Policy for Attracting FDI**
- **Organization for Investment, Economic & Technical Assistance of Iran O.I.E.T.A.I**
- **" Foreign Investment Promotion and Protection Act" (FIPPA)**
- **Foreign Investment Services Center (FISC)**
- **Foreign Investment Licensing Procedure**
- **Incentives of Investment in Iran (Tax, Custom, Free Zones)**



Why Iran?

- 4th Largest Oil Producer in the World
- 2nd Highest Gas Reserves in the World
- Strategic Location on the Persian Gulf and Strait of Hormuz as a main Maritime Pathways for Crude Oil Transport
- Abundance of Basic Raw Materials and Specially Natural Resources and One of the top Producers of Zinc, Lead, Cobalt, Aluminum, Manganese & Copper in World
- Large Domestic Market with a Population of 78 Million and Middle East Market with more than 350 Million Population
- Developed Infrastructure in Transportation, Telecommunications & Energy
- Trained and Efficient Manpower at a Competitive Cost



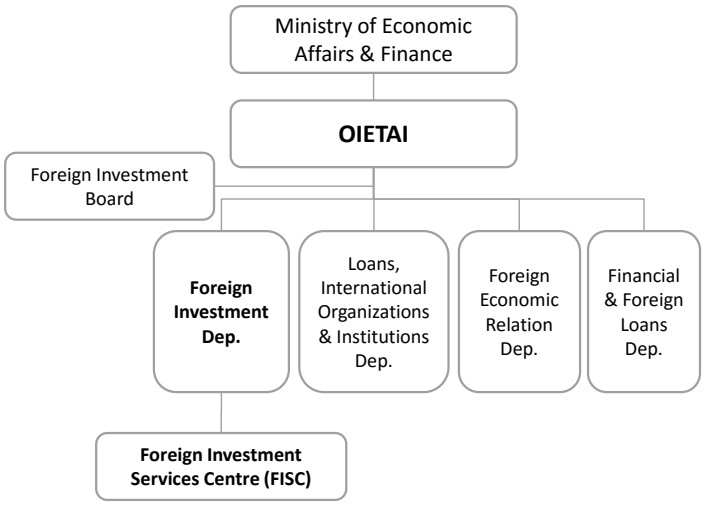
The Policy

- Contribution to Economic Development in Industry, Mining, Agriculture and Services
- Upgrading Technological & Management Skills
- Improving Products with High Quality and Competitive in International Scale
- Increasing Employment & Exports
- Sharing Benefits and Risks on Equal Term without Discrimination

OIETAI



- Founded in June 1975
- The main official authority to promote and protection of Foreign Investment
- Investigation of all issues related to foreign investment such as:
  - **Admission**
  - **Importation**
  - **Utilization**
  - **Repatriation**



The Legislation



- The Foreign Investment Promotion and Protection Act (FIPPA):
  - Substitutes Former LAPFI
  - Ratified in 2002
- The Corpus:
  - Implementing Regulations of the FIPPA



Types of Investments

Direct Investment

(Equity Participation) in All Areas Open to Iranian Private Sector in Greenfield & Brownfield Projects

Investment through Contractual Arrangements

(Non-Equity Forms):

- **Buy Back Arrangements**
- **Civil Partnership**
- **BOT Schemes**



Features of Investment under FIPPA:

No Limitation on:

- **Equity Percentage,**
- **Volume of Investments,**
- **Profit Transfer,**
- **Capital Repatriation**
- **Types of Capital Imported**
- **No Import / Export Restriction**

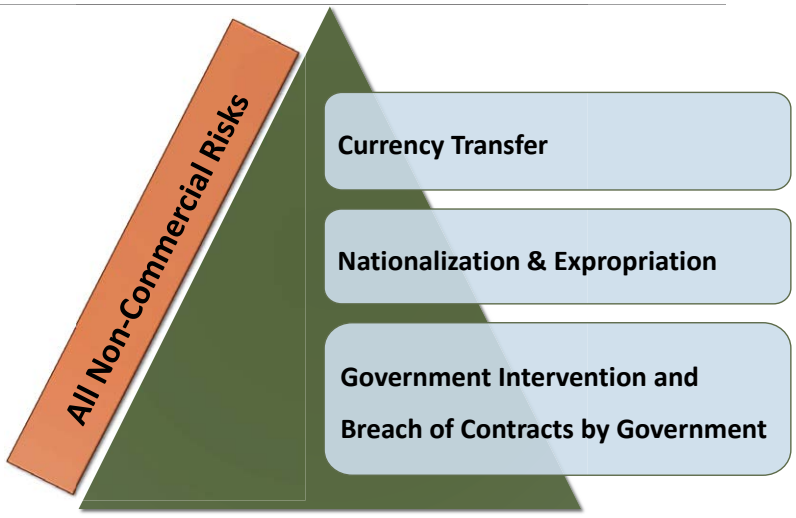


Some other Features of FIPPA

- Possibility of Investment by foreign Natural and Juridical Persons and Iranians Living Aboard
- Equal Treatment with Foreign Investors as accorded to Domestic Investors
- Article 35 Services
  - 3 years Multi-entry Visa
  - 3 years Residence Permit
  - Work Permit



Risks Covered By FIPPA





Foreign Investment Services Center (FISC)

Established at OIETAI with objectives of:

- Facilitation of Issues related to the admission and activities of FDI
- Facilitation of official procedures for required permissions and licenses
- Coordination with Executing Agencies Related to Foreign Investment



FISC Members from Relevant Executing Agencies





Key Services Offered by FISC

- Dissemination of information and provision of necessary guidance to foreign investors concerning investment in Iran.
- General supervision concerning the fulfillment of decisions surrounding foreign investment projects.
- Necessary coordination concerning the issues related to foreign investment including issuance of from the relevant authorities, prior to the issuance of the investment license including:
- the declaration of establishment
- the environment protection license
- the permits for subscriptions relating to water, electricity, fuel and telephone
- the license for exploration and exploitation of mines, etc.

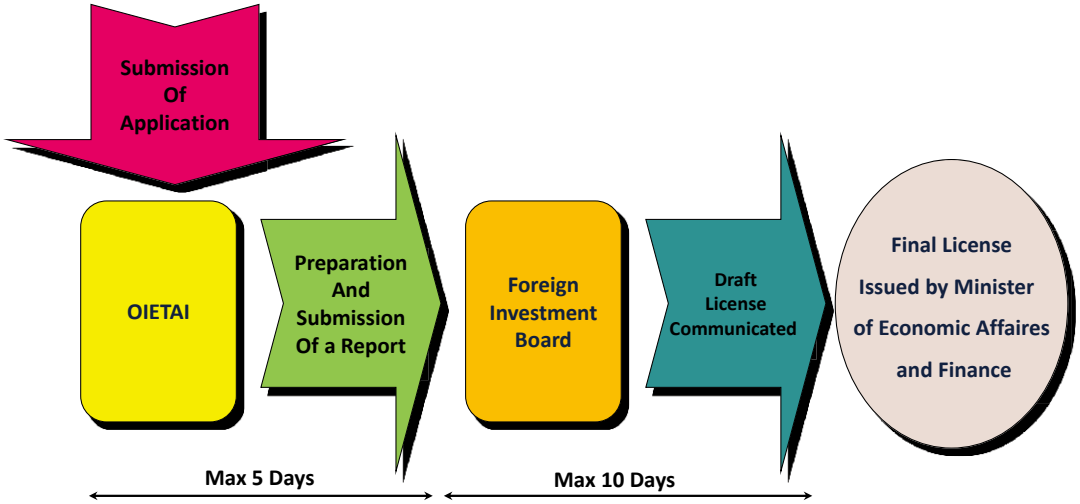


Continued

- Necessary coordination concerning issues related to foreign investment preceding, during and proceeding the issuance of the investment license including:
- registration of joint venture company
- registration of order for importation of machinery and equipments
- issues related to importation and repatriation of capital, customs and tax affairs, etc.



Investment Licensing Procedure





Incentives and Benefits of Foreign Investment in Iran



Tax Incentives

✓ **Fixed corporate income tax at a flat rate of 25%**

Income Tax with Rate of 0.0%	Duration of Exemption
Industry, Mining & Services (Hospital & Hotels)	5 Years
Industry, Mining & Services (Hospital & Hotels) in Industrial Parks and Economic Especial Zones	7 Years
Industry, Mining & Services (Hospital & Hotels) in Less Developed Areas	10 Years
Industry, Mining & Services (Hospital & Hotels) in Less Developed Areas located at Industrial Parks and Economic Especial Zones	13 Years
100% of Income Derived Agricultural Activities	Perpetual
100 % of Income Derived From Export of Services ,non-oil goods, agricultural Products and 20% of Income Derived from Export of Non – Processed goods	Perpetual



Tax Incentives

After the Termination of Tax Holidays Period:

➢Total Taxable income <= registered Capital ⟶ 50% of income is free of tax

In less developed areas:

➢Total Taxable income <= **double of** registered Capital ⟶ **100%** of income is free of tax

NOTE:
In case of each 5% foreign investment, 10% will be added to above incentive, maximum up to 50%

Tax Incentives (Employment and JV)



- In companies with more than 50 employees, in case of increasing the employment volume up to 50% in comparison to last year, one-year exemption can be added to the duration of exemptions (mentioned in previous slide).

- In the case that foreign companies with reliable Brand produce goods using production capacity of Iranian companies and export at least 20% of total production, can enjoy 50% on Tax Rate for the income from sales of products **(12.5 % instead of 25%)** after the end of above duration.

Custom Exemption



- Import of Production Line Machineries and Equipment
- Import of Raw Materials used for Production of Export commodities
- Easy Circumstances & No Duty and Tax for Exportation of Products



Investment Incentives in Free Zones

- 7 free Zones in Iran
- 20 Years Tax Exemption for All Economic Activities
- No needed Visa for Entrance of Foreigners
- Custom Exemption for Raw materials and Industrial machineries of Producing units
- Possibility of Exporting Products to The Mainland
- Easy Circumstances for Re-export and Transit of Commodities





Iran Bilateral Investment Treaties

- Iran has signed its first Bilateral Investment Treaty with Germany in 1965, second BIT signed in the World.
- Since 1995, The Organization for Investment, Economic& Technical Assistance of Iran(O.I.E.T.A.I) has Negotiated & Signed 68 BITs with Different Countries from all over the World.
- Iran has Concluded BIT with Many Capital Exporting Countries such as: Austria(2001),China(2000),France(2003),Germany(2002),Italy(1999),South Korea, (1998),Spain(2002), Sweden(2005),Switzerland(1998)



International Treaties

- **Bilateral Investment Treaties (BIT)**
  - BIT with 68 Countries
  - BIT with South Korea since 2006
- **Double Taxation Treaty (DTT)**
  - DTT with 42 Countries
  - DTT with South Korea since 2008



Iran-South Korea Bilateral Investment Treaty(1)

Protection of Korean Investments and Investors:

- National Treatment(NT)
- Most Favoured Nations Treatment (MFN)
- Full Legal Protection & Fair Treatment
- Compensation for Expropriation and Losses
- Permission of All Transfers Related to Investment into and out of Iran

Iran-South Korea Bilateral Investment Treaty(2)



Effective Mechanism for Settlement of Disputes

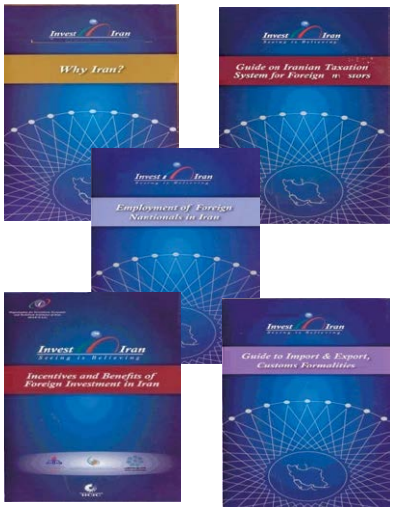
1.Investor- State Disputes

- ✓Negotiation& Consultations
- ✓Courts, or
- ✓Arbitral Tribunal, established under (UNCITRAL)

2.State-State Disputes

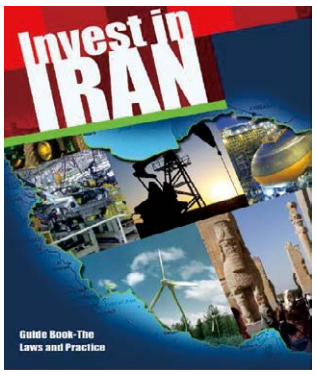
IRAN Investment Guide and Other Publications





Including:

- Introducing Iran macroeconomic performance
- investment climate
- Areas of Opportunities
- The Regulatory Framework
- Visas & Work Permit and procedures to obtain required permissions and licenses for doing business in Iran





Thank you

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Foreign Investment Services Center
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주제2

이란 경제, 180일의 변화

Presentation 2

Enhancing Economic Cooperation between Korea and Iran
- What Has Changed in Iran in the Post-Sanctions Era? -

- Seyed Komail Tayebi (Professor, University of Isfahan)
- Mehdi Yazdani (Professor, Shahid Beheshti University)



Enhancing Economic Cooperation between Korea and Iran: What Has Changed in Iran in the Post-Sanctions Era?

Seyed Komeil Tayebi

Professor of Economics, Faculty of Administrative Sciences and Economics, University of Isfahan, sk.tayebi@ase.ui.ac.ir

Mehdi Yazdani

Assistant Professor of Economics, Faculty of Economics and Political Sciences, Shahid Beheshti University, Ma_yazdani@sbu.ac.ir

Iran-Korea Economic Forum

1. Introduction

- Huge world trade volume during last decades. For example:
  - ✓ World Export Value of merchandise, 2015: USD billion 15985
  - ✓ World Imports Value of merchandise, 2015: USD billion 16340
  - ✓ World Export Value of commercial services, 2015: USD billion 4675
  - ✓ World Imports Value of commercial services, 2015: USD billion 4570
- Leading exporters of merchandise trade, 2015: Rank of Korea is 6 in the world.

Iran-Korea Economic Forum

1. Introduction, cont.

- **Iran's Situation:**
  - ✓ Market Size.
  - ✓ Human Resources.
  - ✓ Geographical Location.
  - ✓ Regional Security.
  - ✓ Farther role in Globalization.

Iran-Korea Economic Forum

1. Introduction, cont.

- **Important policies in the post sanction era to reach:**
  - ✓ Higher Economic Growth (at least 8 percentage)
  - ✓ Higher Foreign Direct Investment (30-50 billion $ every year)
  - ✓ Lower Unemployment Rate.
  - ✓ Inflation Reduction.

Iran-Korea Economic Forum

1. Introduction, cont.

- **Organization of this paper:**
  - ✓ Reviewing historical data of Iranian international trade and bilateral international trade between Iran and Korea (section1);
  - ✓ Reviewing historical data of Iran's FDI from the world and Korea (section2);
  - ✓ Reviewing Iran's International Cooperation in (Economic and political) the Post Sanction Era (section3);
  - ✓ Ranking of potential trade for commodity groups between Iran and Korea (section4);
  - ✓ Suggestions for promoting bilateral trade flows between Iran and Korea (section5).

Iran-Korea Economic Forum

1. Introduction, cont.

- Commodity Groups of Goods

Iran-Korea Economic Forum

2. Realized Facts

- Iran's Trade Flows with Continents
- Iran's Trade Flows with Major Partners, 1992-2015
- Iran-Korea Trade Flows

Iran-Korea Economic Forum

2. Realized Facts, cont.

- **Trade Performance Index**
  - Iran
  - Korea
- **International Trade Costs**

Symmetric bilateral trade costs are computed using the Inverse Gravity Framework (Novy 2009), which estimates trade costs for each country pair using bilateral trade and gross national output.

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2. Realized Facts, cont.

- **Export-Import Similarity (EIS) Index**

One of the simplest ways of measuring the degree of complementarity between two countries is to examine the extent of similarity or dissimilarity in their export and import structures. If the export structure of one country has high degree of similarity with the import structure of the other country and vice-versa, there is potential complementarity for trade between them.

Cosin Index $= \frac{\sum_k X_{ik} M_{jk}}{\sqrt{\sum_k X_{ik}^2} \sqrt{\sum_k M_{jk}^2}}$

Finger-Kreinin Index $= \sum_i \min([X_{ij}/\sum X_{ij}], [X_{ik}/\sum X_{ik}]),$

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2. Realized Facts, cont.

- **Inter or Intra Industry Trade**

Intra (Inter)-industry trade refers to the exchange of similar (dissimilar) products belonging to the same (different) industry. The term is usually applied to international trade, where the same (different) types of goods or services are imported and (or) exported.

Balassa Index: $B_j = \frac{|X_i - M_i|}{(X_i + M_i)}$

Grubel and Loyd (GL) Index: $GL_{jt} = \frac{\sum_j (X_{jk} + M_{jk}) - \sum_j |X_{jk} - M_{jk}|}{\sum_j (X_{jk} + M_{jk})}$

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2. Realized Facts, cont.

- **Horizontal or Vertical Intra Industry Trade**

Horizontal: Trade in similar products with differentiated varieties (e.g. cars of a similar class and price range). $1 - \alpha \leq \frac{UV^X_{kk'it}}{UV^M_{kk'it}} \leq 1 + \alpha$

Vertical: Trade in products distinguished by quality and price (e.g. exports of high-quality clothing and imports of lower-quality clothing).

$\frac{UV^X_{kk'it}}{UV^M_{kk'it}} > 1 + \alpha$ or $\frac{UV^X_{kk'it}}{UV^M_{kk'it}} < 1 - \alpha$

Greenaway and Milner (1986): α=0.25 Fontagne and Freundnberg (1997): α=0.15

Iran-Korea Economic Forum

2. Realized Facts, cont.

- **Revealed Comparative Advantage (RCA)**

Measures of RCA have been used to help assess a country's export potential. Similar RCA are unlikely to have high bilateral trade unless intra-industry trade.

$RCA_{ij} = (x_{ij}/X_{it}) / (x_{wj}/X_{wt})$

x_{ij} and x_{wj} : values of country i's exports and world exports of product j

X_{it} and X_{wt} refer to the country's total exports and world total exports

Less than unity = revealed comparative disadvantage

Exceeds unity = revealed comparative advantage

Iran-Korea Economic Forum

2. Realized Facts, cont.

- **Foreign Direct Investment in Iran…**

✓From All Countries.

✓From Korea.

Iran-Korea Economic Forum

3. Iran's International Cooperation in the Post Sanction Era

- **Economic Atmosphere in the Post-Sanction Era….**

✓ Diplomatic Traffic after Iranian Trade Borders (Germany, France, Italy, Serbia, England, Czech Republic, Spain, Austria, Poland, Portugal, Brazil, South Africa, Poland, Japan, South Korea, India, Afghanistan, Croatia, ….);

✓ Enhancing economic relation with countries;

✓ Economic agreement and contracts with countries;

✓ Decreasing Iran's risk in international environment;

✓ International trade in all commodity groups;

✓ FDI Flow in the post-sanction ear.

Iran-Korea Economic Forum

3. Iran's International Cooperation in the Post Sanction Era, cont.

- **Political Atmosphere in the Post-Sanction Era…**

✓ Senior Officials of the World in Iran;

✓ Inviting Senior Iranian Officials;

✓ Removing phobia of Iran.

Iran-Korea Economic Forum

3. Iran's International Cooperation in the Post Sanction Era, cont.

- **The Goals of Political and Economic Relations:**

✓Using the Iranian Market;

✓Using the Middle East Market;

✓Using the Market of Central Asia and CIS countries.

Iran-Korea Economic Forum

4. Ranking of Potential Trade for commodity groups between Iran and Korea

- **Ranking of Potential Trade for commodity groups between Iran and Korea by:**

✓Export-Import Similarity Indices (Cosin and FK);

✓Intra-Industry Trade;

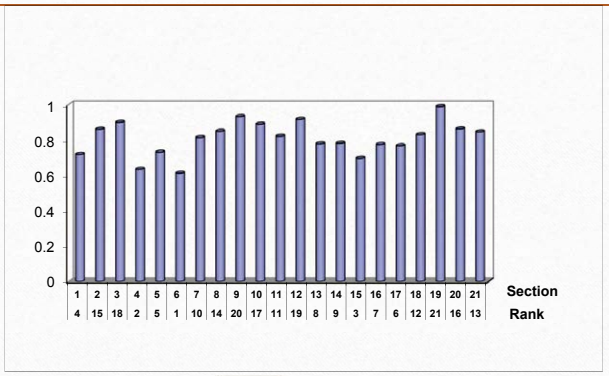
✓Horizontal Intra-Industry Trade;

✓Border Effect Indices (introduced in estimation results).

Iran-Korea Economic Forum

4. Ranking of Potential Trade for commodity groups between Iran and Korea, cont.

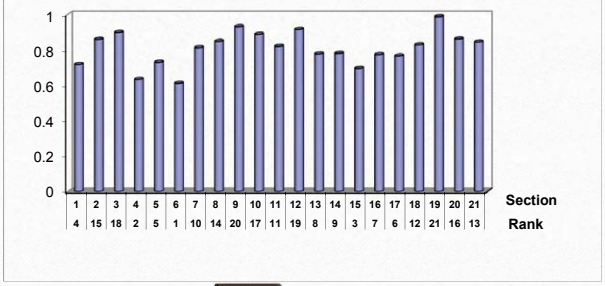
- BE1 and H15



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4. Ranking of Potential Trade for commodity groups between Iran and Korea, cont.

- BE2 and H15



5. Conclusion and Policy Implication

- Korea is the fourth major partner of Iran during 1992-2014.
- Trade performance of two countries is higher for Korea.
- Low similarity for Exports and Imports between Iran and Korea.
- Low index for IIT between Iran and Korea.

5. Conclusion and Policy Implication, cont.

- More vertical IIT than horizontal IIT.
- More *Border Effects* on commodity groups among Iran and its farther partners.
- Summary: Korea has been more beneficial rather than Iran.
- Why does it occur?

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5. Conclusion and Policy Implication, cont.

- Export as residuals of production in Iran.
- There is no strategy for export development in Iran.
- Trade in Iran has been so far as an import substitution strategy.
- What about policy implications?

Iran-Korea Economic Forum

5. Conclusion and Policy Implication, cont.

- Strategy of export development for commodity groups with highest rank.
- Using bilateral agreement and preferential tariffs.
- Foreign direct investment (joint-venture, technology technology)
- Move to outsourcing agreement
- Emphasizing horizontal IIT.
- **More cooperation in maritime industry to reduce *Border Effects***.

Iran-Korea Economic Forum

July 25-26, 2016, Busan, Korea

Thank you for your Attention

주제3

한-이란 경제 협력 방안

Presentation 3

Economic Cooperation Between Korea and Iran

- Byung-il Choi
(Professor, Ewha Womans University)

Iran-Korea Economic Forum
July 2016

Economic Cooperation between Korea and Iran

Opportunities and Challenges

CHOI Byung-il
Ewha Womans University

1976 vs 2016







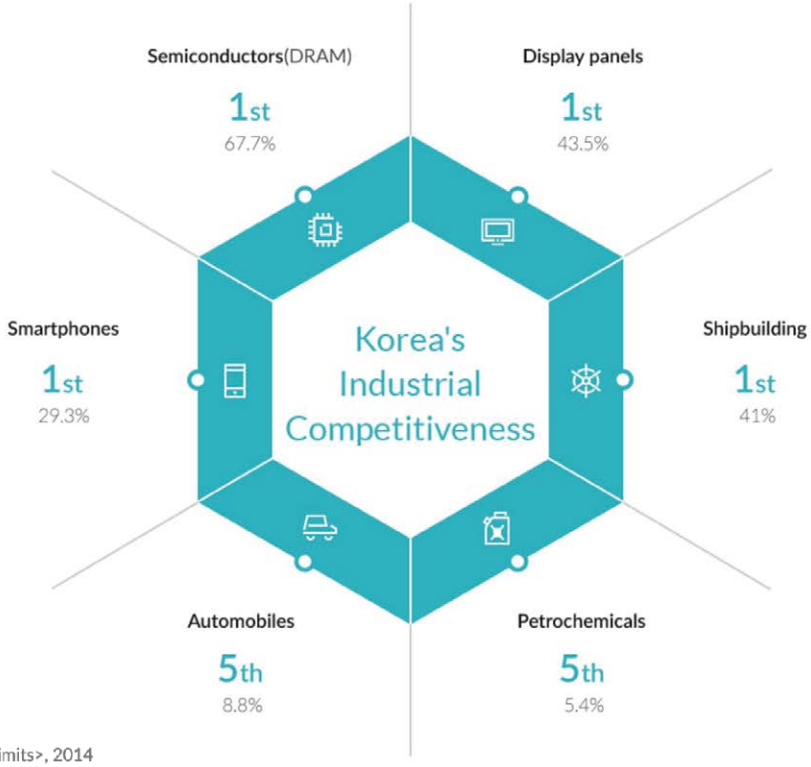


Global Place of Korea



Source : Ministry of Trade, Industry & Energy (2015)

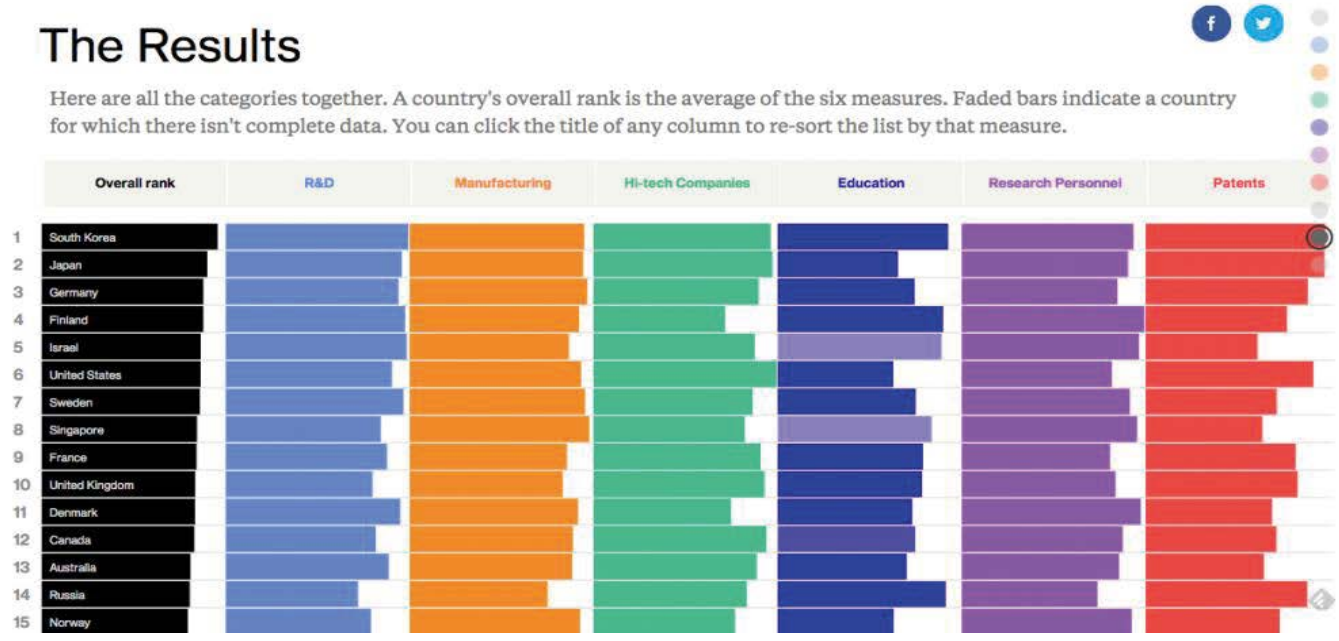
Korea's Industrial Competitiveness

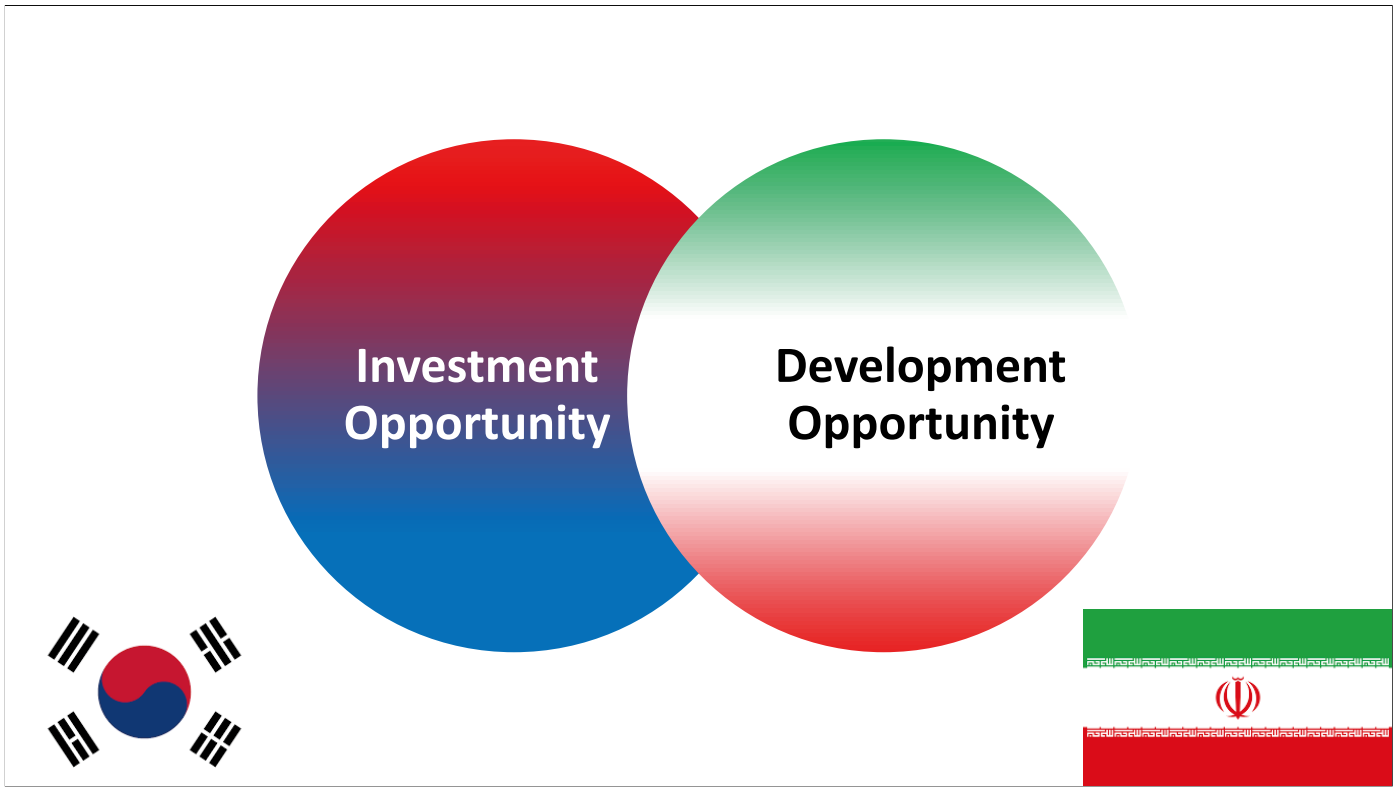


* Source : Invest Korea, <Korea, Where Success Knows No Limits>, 2014

The most innovative nation in the world

2015 Bloomberg Innovation Index





Construction and Infrastructure

State of the art



Incheon International Airport



Cargo traffic volume
The world's 2nd largest



Busan Port



Cargo transshipment volume
The world's 3rd largest







Penang Bridge, (13.5km)
Malaysia
1985



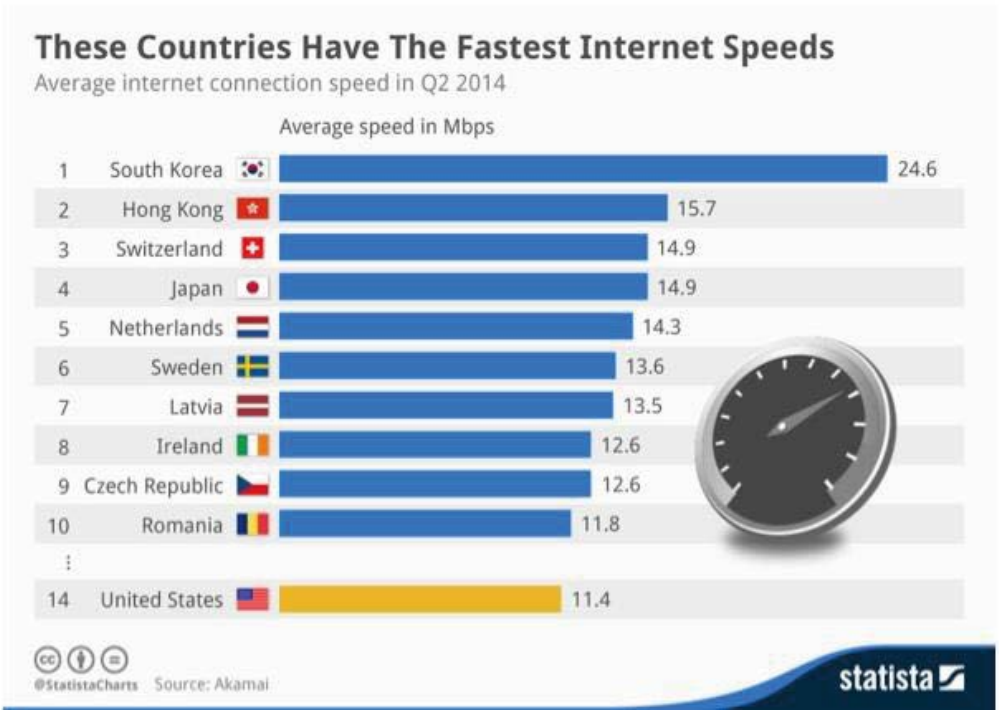


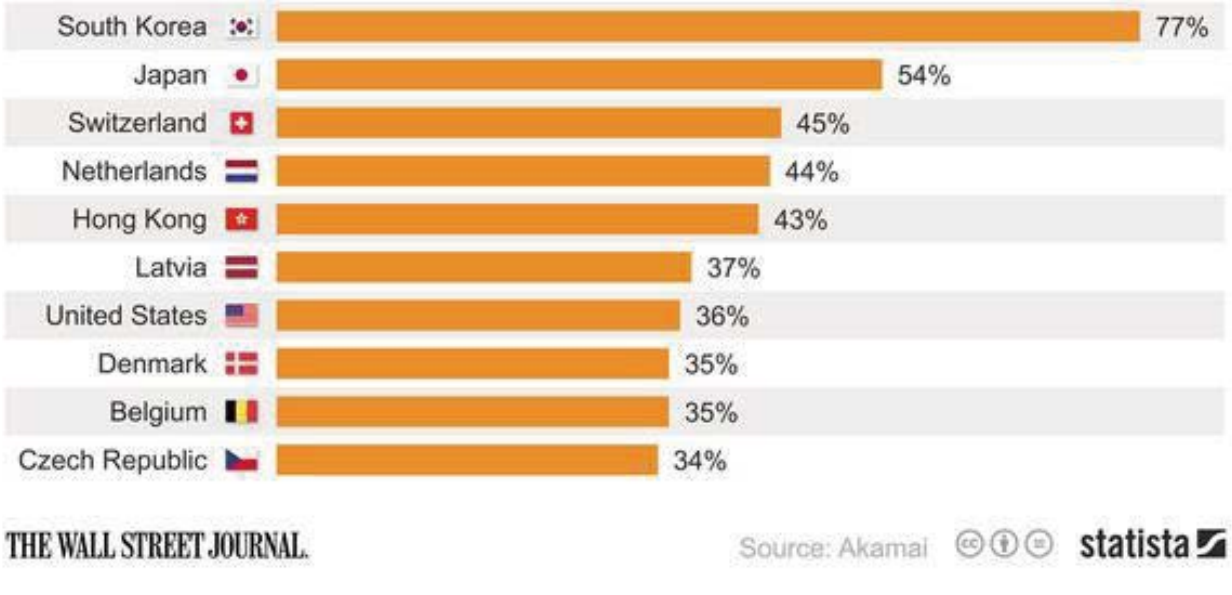
The Third Bosphorus Bridge,
Turkey (2,164m)
2013-2016

The widest in the World
The longest with a rail system
Connecting the European and Asian sides of Istanbul

Information Technology

The most advanced


These Countries Have The Fastest Internet Speeds
Average internet connection speed in Q2 2014
Average speed in Mbps
1 South Korea 24.6
2 Hong Kong 15.7
3 Switzerland 14.9
4 Japan 14.9
5 Netherlands 14.3
6 Sweden 13.6
7 Latvia 13.5
8 Ireland 12.6
9 Czech Republic 12.6
10 Romania 11.8
14 United States 11.4
@StatistaCharts Source: Akamai
statista


Top 10 countries with the highest penetration of 10+ Mbps Internet connections (2014)
South Korea 77%
Japan 54%
Switzerland 45%
Netherlands 44%
Hong Kong 43%
Latvia 37%
United States 36%
Denmark 35%
Belgium 35%
Czech Republic 34%
THE WALL STREET JOURNAL.
Source: Akamai
statista

Consumer Products

Capturing the imagination of the world









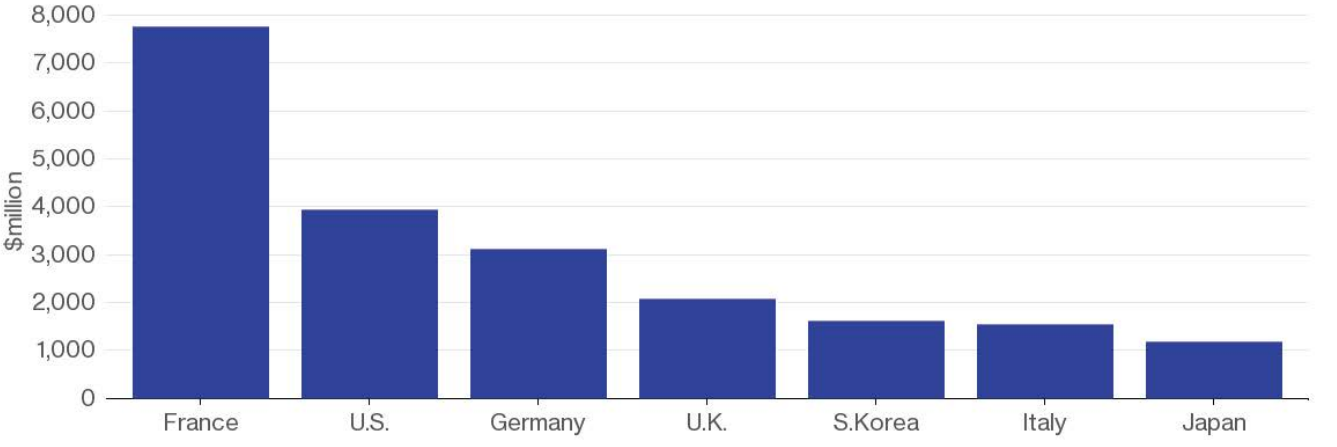









PRIME TIME
NEWS
KOREA'S PANEL MAKERS DOMINATE
Samsung and LG Display take up over 60% of global panel market

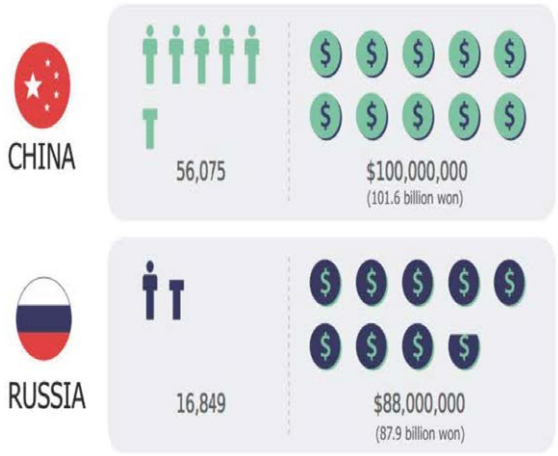

2014 Cosmetics Exports
$million
8,000
7,000
6,000
5,000
4,000
3,000
2,000
1,000
0
France
U.S.
Germany
U.K.
S.Korea
Italy
Japan
Source: HI Investment & Securities, Korea International Trade Association
Bloomberg

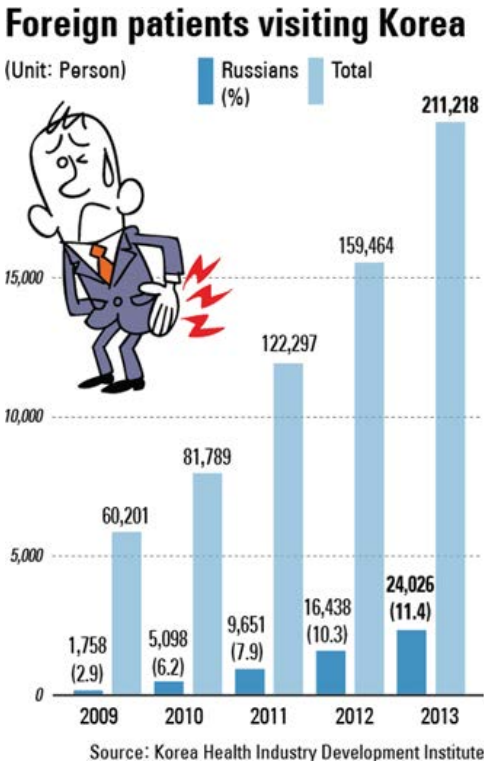
Health & Medical Service

Top Medical Technology
World's Best Hospital IT System

The world found a new Doctor

Chinese and Russian patients are trusting Korea to take care of their health



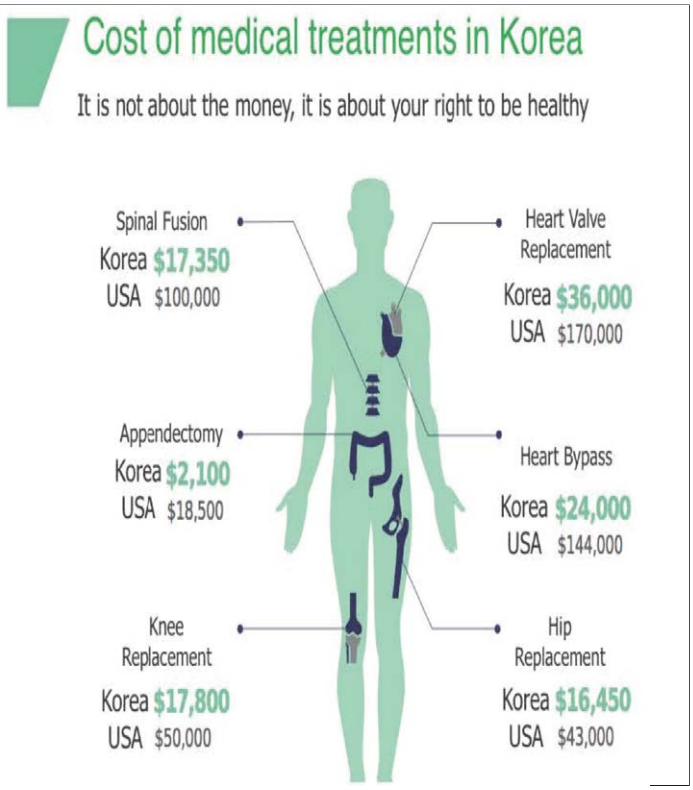


Top Medical Technology
Top Medical staff with cutting edge equipment

Korean hospitals are leading the 5-year relative survival rates(%), ranked World's Number 1 in liver transplant success rate(96%) and possessing the only Proton Therapy Center in Asia







K-Pop

Globally Entertaining



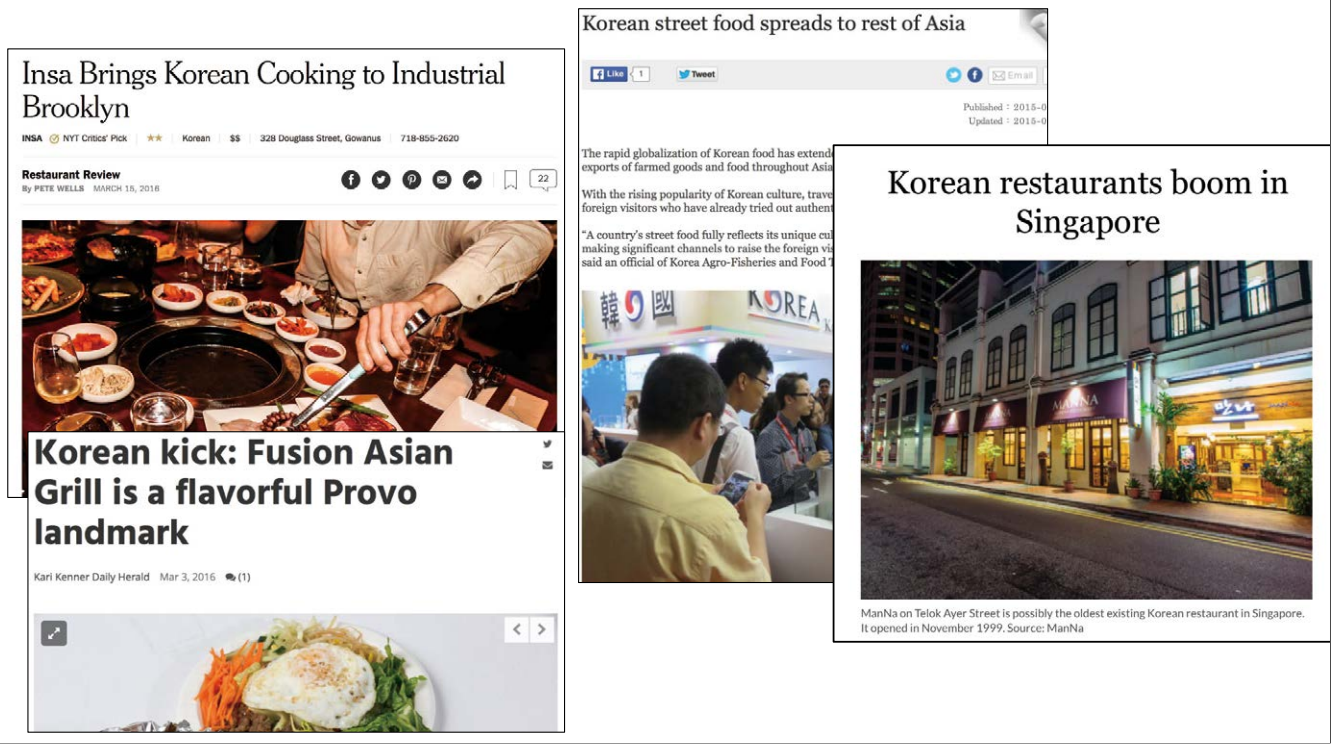






Korean Cuisine

"Healthy and Tasty"

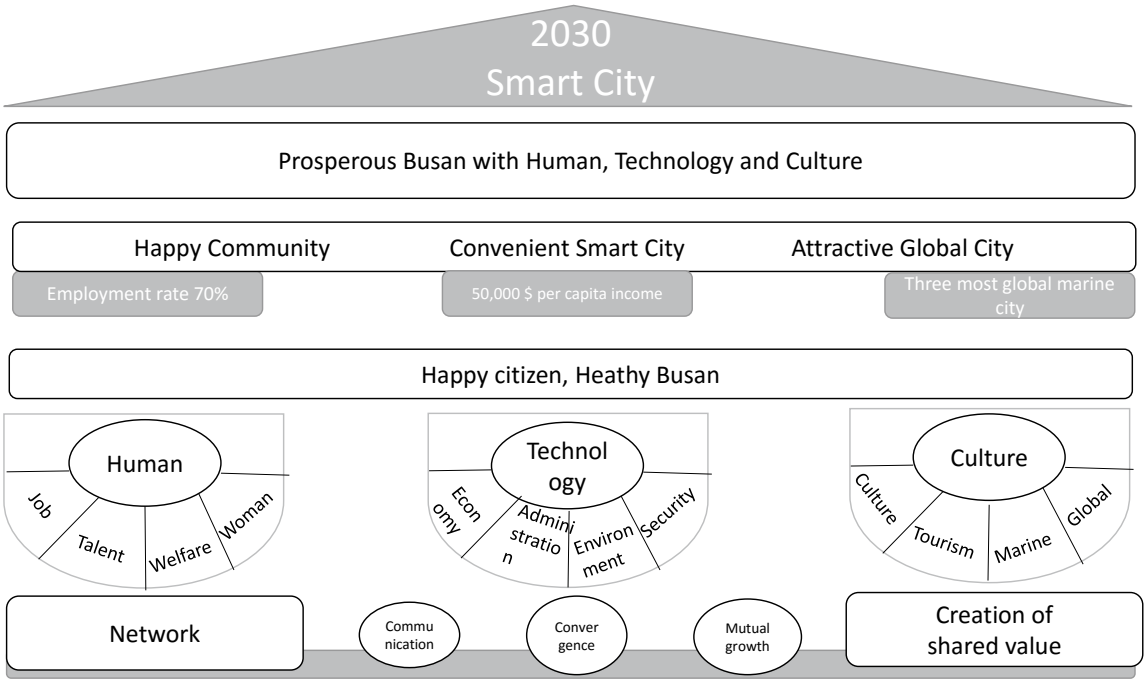


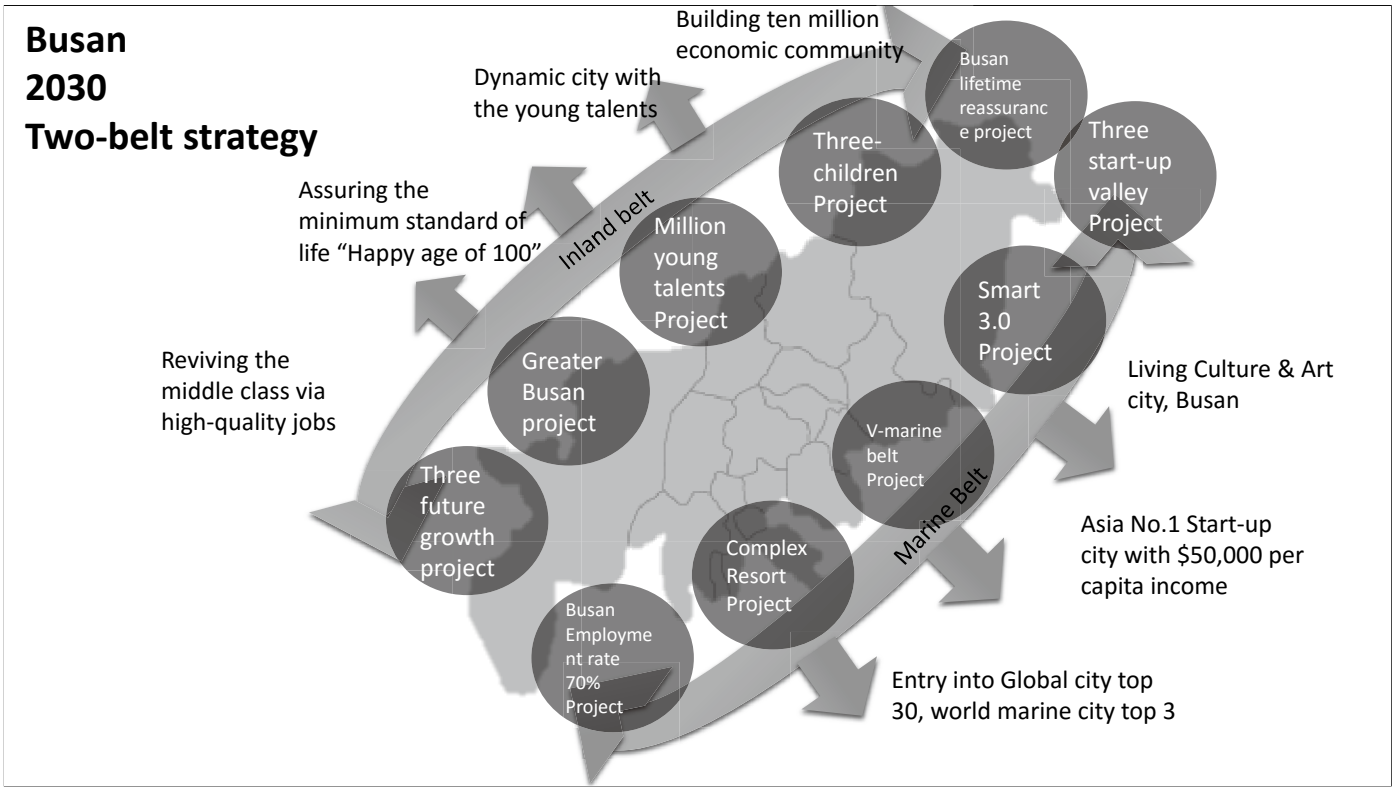
Busan as Smart Global City

"Happy, Convenient, and Attractive"

	VISION	STRATEGY	LESSSON
London	Sustainable World City	• Comfortable, Healthy • Access to London, Economy ↑	• Attractiveness • Promoting start-ups
Barcelona	The city that puts people first	• IoT → Vitalization of the economy • City renewal	• City renewal through IT • City renewal → Economy↑
Stockholm	World-class Stockholm	• Growth + Innovation • Effective Univ + Industry collaboration	• SMEs with strengths
Hong Kong	Asia's world city	• Globalization: Finance, Shopping • Collaboration with the mainland	• Attractiveness + Service industry • Effective use of the economy system
Singapore	Lively and livable global city	• Tour attractions • Service + Manufacturing industry	• Tourist-friendly design • Convergence industries
Fukuoka	Focal point of exchange within Asia	• Enhancing the international exchange program	• Convention industry
New York	A Greener, Greater New York	• World's #1: Finance, Culture, Service • City renewal: Go Green	• 'Green City'

Busan: 2030 vision





Challenges: *Make Growth Sustainable*

Korea-Iran Cooperation

- Transaction
- SDN List
- Visa
- Investment
- Cross-Cultural Communication

Limited Payment Channel

- Currently, only the payment channel in Korean currency
- Bottleneck when investment increases
- *Working to adopt payment channel in other currencies*

Solving Business Barriers

"Opened, but not OPENED"

- Cannot have business, transfer with the listed person on
  the Specially Designated Nationals and Blocked Persons list
  - *UN SDN list, OFAC SDN list, EU SDN list*
- Difficulties in Visa application
- Trade facilitation (customs procedure)

Cross-Cultural Communication

Steps to build Trust

- *Cross cultural conflicts*
- *Education and Learning*
- *Awareness and Understanding*

Upgrading Investment Environment

- Need to upgrade **Korea-Iran BIT(2006)**
- **Korea-Iran FTA**/Early Harvest or CEPA
  Eventual goal: CEPA including FTA
- Iran's Accession to ICSID
- Iran's accession to the WTO
  - *KSP(Knowledge Sharing Program)*

People-People exchange
Strengthen Private Sector of Iran: Capacity/Capability

- Student/*Scholars*
- *Exchange program*
- *Seminar/Workshop*

주제4

이란 항만 투자 비즈니스

Presentation 4

The Capacity of Investment in Iranian Port Sites

- Abbas Arabmazar
(Dean, Faculty of Economics and Political Sciences, Shahid Beheshti University)
- Mehdi Yazdani
(Professor, Shahid Beheshti Universit)

International Conference on the Cooperation Platform for Iran and Korea in the Post-Sanctions Era

Iran-Korea Economic Forum II

July 25-26, 2016, Busan, Korea

The Capacity of Investment in Iranian Port Sites

Abbas Arabmazar

Associate Professor of Economics, Dean, Faculty of Economics and political Sciences, Shahid Beheshti University, ab_arabmazar@sbu.ac.ir

Mehdi Yazdani

Assistant Professor of Economics, Faculty of Economics and Political Sciences, Shahid Beheshti University, Ma_yazdani@sbu.ac.ir

Iran-Korea Economic Forum

Introduction

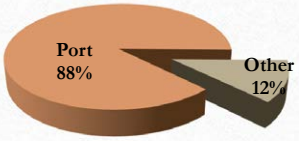
- The importance of the world trade during last decades.
- By Iran:
  - ✓ Weight of Export to the world 82 million ton, 2014;
  - ✓ Weight of Import from the world 43 million ton, 2014;
  - ✓ Weight of Export and Import 125 million ton, 2014;
  - ✓ Weight of Export and Import 142 million ton, 2015.

Iran-Korea Economic Forum

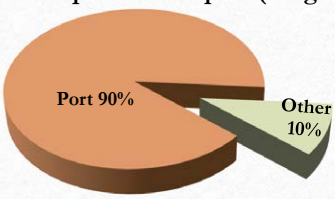
Introduction, cont.

- **The Role of Maritime Transportation in Economic, 2015:**

Share of Ports in Iranian Export and Import (weight)



Share of Ports in the World Export and Import (weight)

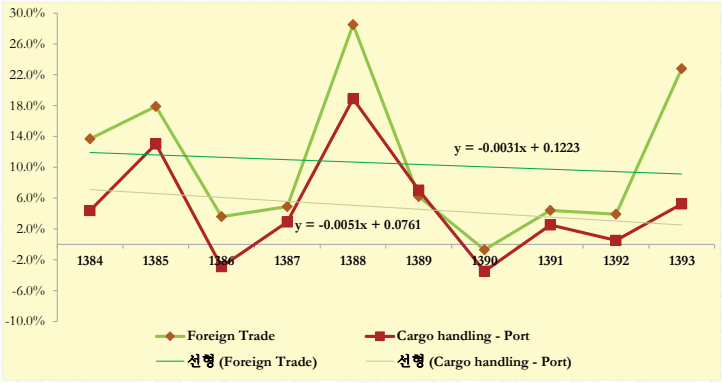


- The dependence coefficient of Iranian economy in maritime transportation: 45% (in value).

Iran-Korea Economic Forum

Introduction, cont.

- The relation between the growth rate of foreign trade and cargo handling in Iran's ports, 2005-2014.



Iran-Korea Economic Forum

Top 10 Container Terminals, 2014:

Port	Country	Throughput (TEU million)	Rank
Shanghai	China	35.29	1
Singapore	Singapore	33.87	2
Shenzhen	China	24.03	3
Hong Kong	Hong Kong	22.23	4
Ningbo	China	19.45	5
Busan	South Korea	18.65	6
Qingdao	China	16.62	7
Guangzhou	China	16.16	8
Dubia	Emirate	15.25	9
Tianjin	China	14.05	10

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Top Middle East Ports Container throughput, 2013:

Port	Country
Jebel Ali	Emirate (U.A.E)
Khorfakan	Emirate (U.A.E)
Shahid Rajaee	Iran
Jeddah	Saudi Arabia
Salalah	Oman
Damam	Saudi Arabia
Karachi	Pakistan

Iran-Korea Economic Forum

Iran's opportunities:

- ✓ Market Size;
- ✓ Trained Human Resources;
- ✓ Geopolitical Location;
- ✓ Regional Security;
- ✓ The Gate for International Trade with CIS.

Iran-Korea Economic Forum

The capacities and abilities of Iran's Ports

✓ Iran's Ports Information in 2015:

item	Quantity	Unit
Seaside Length	5800	Km
Nominal Capacity of Iran's Ports	200	million ton
Container Capacity of Iran's Ports	5.3	million TEU
Passenger Movements Capacity of Iran's Ports	17.5	Million person
Maritime Capacity of Iran	5.2	million ton
Oil Maritime Capacity	15	million ton
Channel Length	33.7	Km
Port and Hinterland Area	17698	hectare
Open Storage Area	1134	hectare
Warehouse Area	112.7	hectare

Iran-Korea Economic Forum

The features of main port of Iran

The main port of Iran is Shahid Rajaee port;

- ✓ Being located on the main route of North-South Transit Corridor (INSTC) and East-West corridor, with the aim of facilitating the transit of cargos to the countries of Central Asia, Persian Gulf and Gulf of Oman Region, Afghanistan, Pakistan and Iraq;
- ✓ Close to the main centers of production, industry and petrochemicals;
- ✓ Existence of banking, credit, insurance, customs networks and other related service;
- ✓ Existence of various terminals for fuel transit, containers, general cargos, petrochemical products and minerals;

Iran-Korea Economic Forum

The features of main port of Iran, cont.

- ✓ Capacity of handling more than 90 million tons of goods per year;
- ✓ Capacity of handling more than 3.3 million TEU containers per year;
- ✓ Working with more than 80 percentage of it nominal capacity;

Title	Province	City	Distance from Province Center	Distance from Tehran	Distance from Airport	Channel Length	Basin Depth
Shahid Rajaee	Hormozgun	Bandar Abbas	32	1350	40	8334	-14
	Berth Length	Number of Berths	Port and Hinterland Area	Longitude	Latitude	Open Storage Area	Warehouse Area
	8245	35	3260	56.057	27.108	1999979	462069

Iran-Korea Economic Forum

Economic goals in the post sanction era:

- ✓ Higher Economic Growth (at least 8 percent per year);
- ✓ Higher Foreign Direct Investment (30-50 billion $ per year);
- ✓ Lower Unemployment Rate;
- ✓ Lower Inflation rate.

Iran-Korea Economic Forum

Main maritime goals in the post sanction era:

Item	Goal in 6th Development Plan	Unit	2016	2020
1	Nominal Capacity of Iran's port (commercial)	million ton	210	250
2	Container Capacity	million TEU	4.86	8.7
3	Passenger Handling Capacity	million person	18.5	23
4	Maritime Non-oil Fleet Capacity	million ton	7.5	12.5
5	Maritime Oil Fleet Capacity	million ton	15.5	18
6	Investment by Non Public Sector (at least)	billion US $	2	3.5

Iran-Korea Economic Forum

cont.

- **Estimated Port throughput in 6th development plan:**

6th Development Plan					2015	Item
2020	2019	2018	2017	2016		
48.0	47.1	46.2	45.3	44.5	43.6	Import
76.1	71.6	67.3	63.2	59.4	55.9	Export
19.8	17.8	16.1	14.5	13.1	11.9	Transit
51.5	48.5	45.6	42.9	40.4	38.0	Cabotage
3.5	3.2	2.9	2.6	2.3	2.1	Transshipment
3.5	3.3	3.1	2.9	2.8	2.6	Others
202	**191**	**181**	**172**	**163**	**154**	**Sum (million ton)**

Iran-Korea Economic Forum

cont.

2020	2019	2018	2017	2016	2015	Unit	Operation
45	45	44	44	43	43	million ton	**Oil**
157	146	137	128	120	111	million ton	**Non-oil**
202	191	181	172	163	154	million ton	**Oil and Non-oil**
7,065	6,444	5,879	5,288	4,372	2,985	thousand TEU	**Container**
24,528	23,075	21,621	20,168	18,714	17,261	thousand	**Passenger**

Iran-Korea Economic Forum

cont.

- **Capacity building goals in 6th development plan:**

2020	2019	2018	2017	2016	2015	Unit	Capacity
252	244	235	226	217	209	million ton	**Nominal**
8,831	8,168	7,506	6,843	6,080	5,318	thousand TEU	**Container**
25,819	24,426	23,033	21,640	20,246	18,853	thousand person	**Passenger**

Iran-Korea Economic Forum

cont.

- **Maritime fleet capacity goals in 6th development plan:**

2020	2019	2018	2017	2016	2015	Unit	Operation
58	56	53	51	49	47	million ton	**Trade**
184	167	153	141	132	124	million ton	**Oil**

Iran-Korea Economic Forum

Investment opportunities in Iran's Ports (6th Development Plan), billion US $:

Total(at least)	Goal		Total (at least)	Goal	
0.5	Fleet Renovation	5	2.7	Container Terminal Capacity	1
8.5	Non-oil Fleet Capacity	6	1.8	Nominal Port Capacity	2
3.5	Oil Fleet Capacity	7	1.5	Passenger Port Terminal Capacity	3
0.4	other	8	0.03	Passenger Fleet capacity	4

Iran-Korea Economic Forum

July 25-26, 2016, Busan, Korea

Thank you for your Attention

세션2

한-이란 해양수산 협력 방안

Session 2

Korea-Iran Cooperation in Maritime and Port Industries



주제1

이란 항만 개발과 협력

Presentation 1

Maritime Transport in IRAN & Investment Opportunities

- Mohammad Saeed Nejad
(Deputy Minister and the Managing Director,
Ports and Maritime Organization)



MARITIME TRANSPORT IN IRAN & INVESTMENT OPPORTUNITIES

By : Mohammad Saeednejad
Email: m_saeednejad@pmo.ir
Managing Director of Ports & Maritime Organization
Korea- July 2016

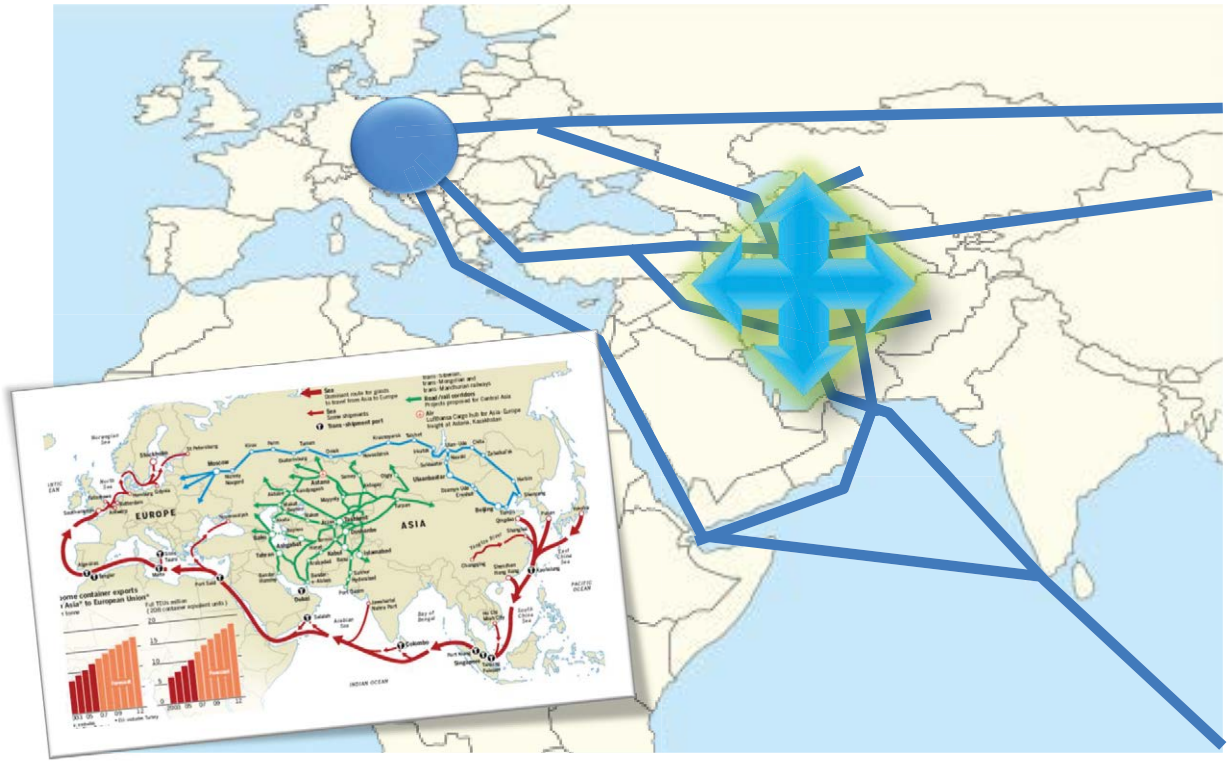
One of the most important maritime countries in the Middle East,

- Neighboring 15 countries.
- Having coastal borders in Caspian sea, Persian Gulf & Oman Sea.
- Various ports along 5800 km coast line at north & south.



Different Trade Routes

Iran, as a trade crossroad



Transit Opportunities

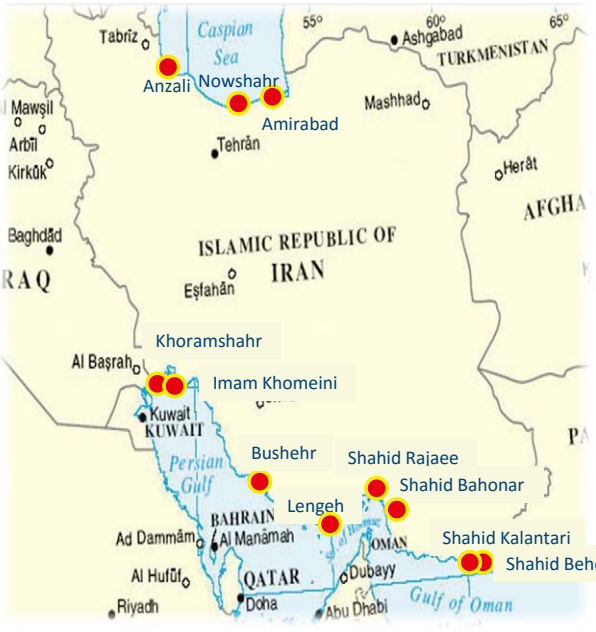
International North-South Transport Corridor (INSTC)



Transshipment Opportunity



Supervising, management & ownership of ports



Supervising 54 ports in Iran including

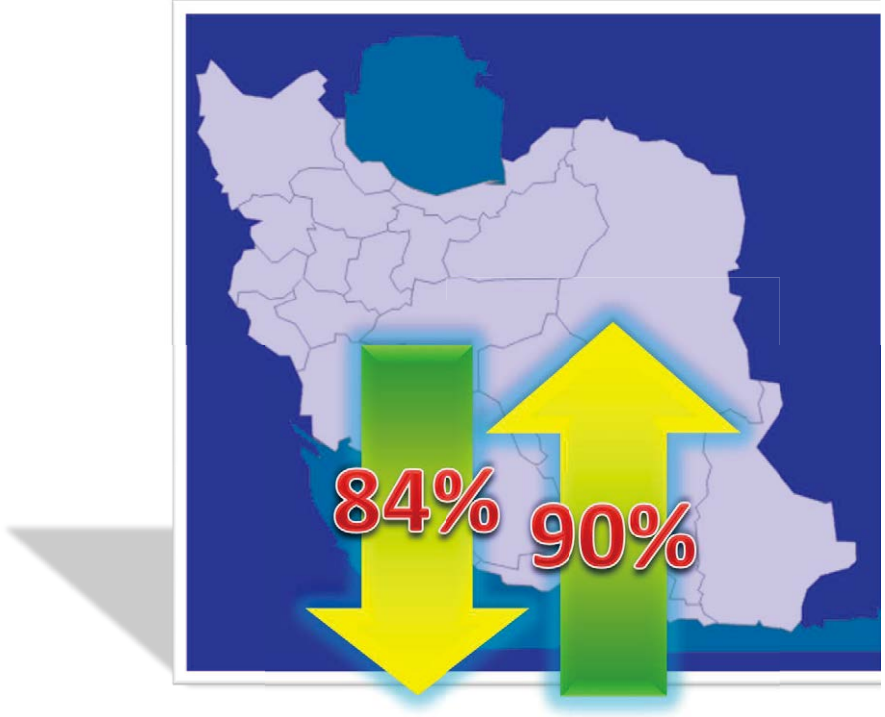
ownership and management of 30

major , medium size and small

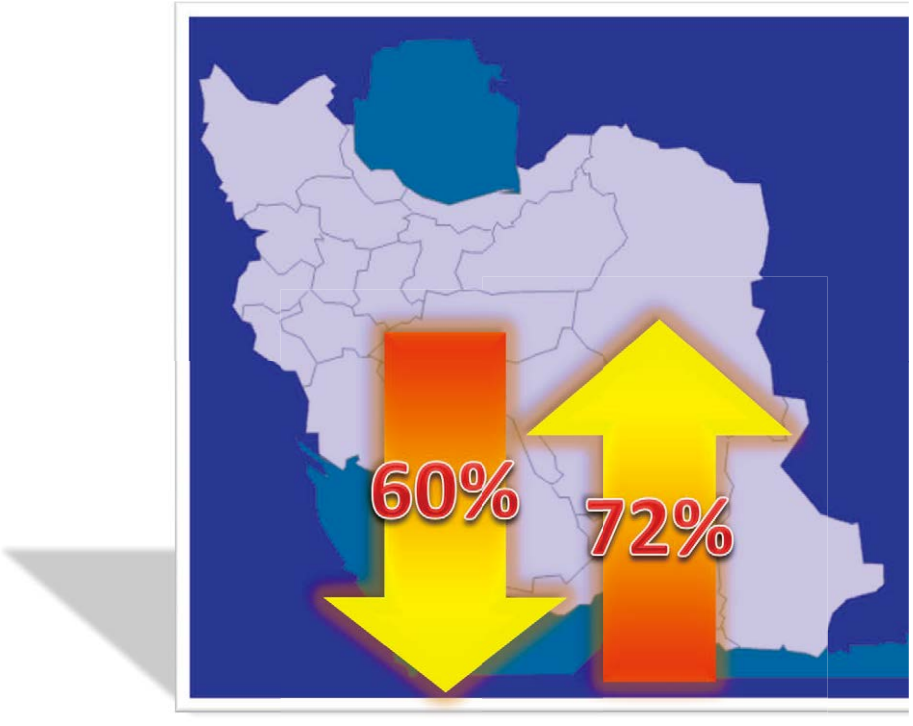
commercial ports with about 200

illion ton capacity

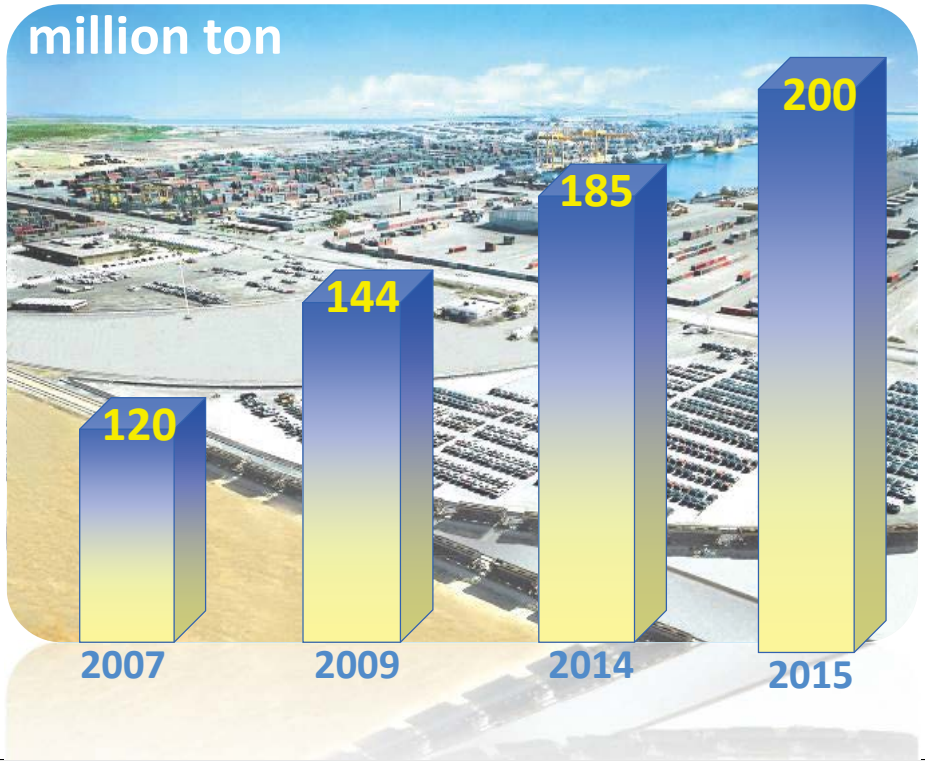
Market Share (Volume) of Maritime Transport in Country's Trade (Import & Export) , 2015



Market Share (Value) of Maritime Transport in Country's Trade (Import & Export) , 2015



Iranian Ports' Capacity



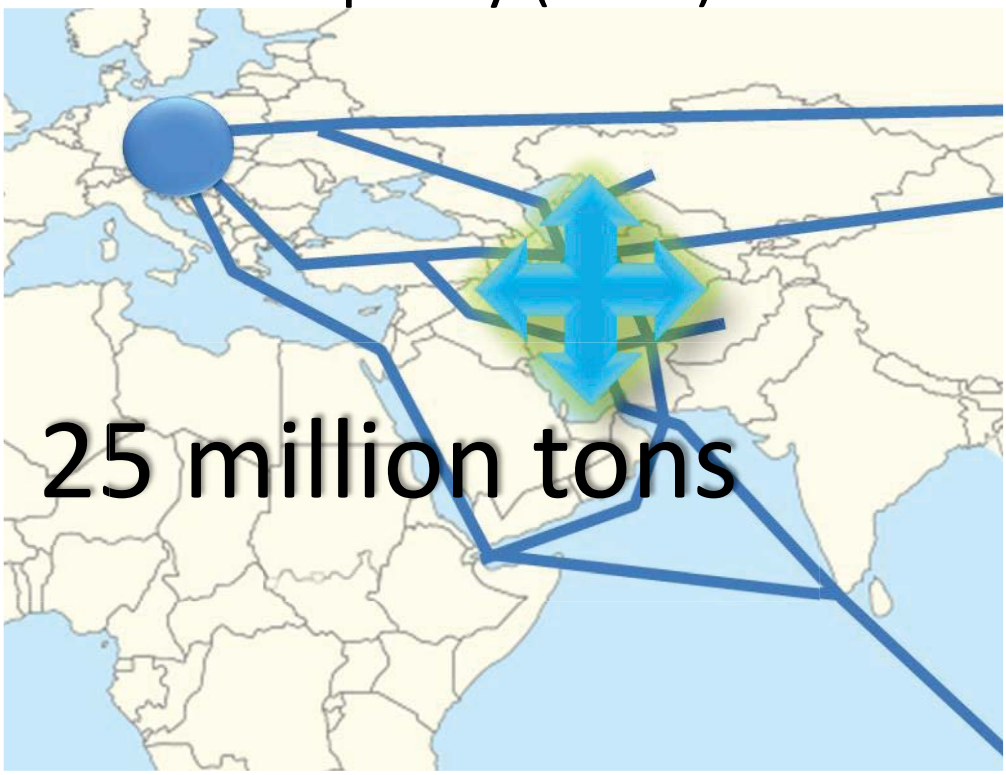
Ports' Container throughput (2013)



All Ports' throughput (2015)



Iran's South and North Ports Transit Capacity (2015)



Transit cargo (2015)

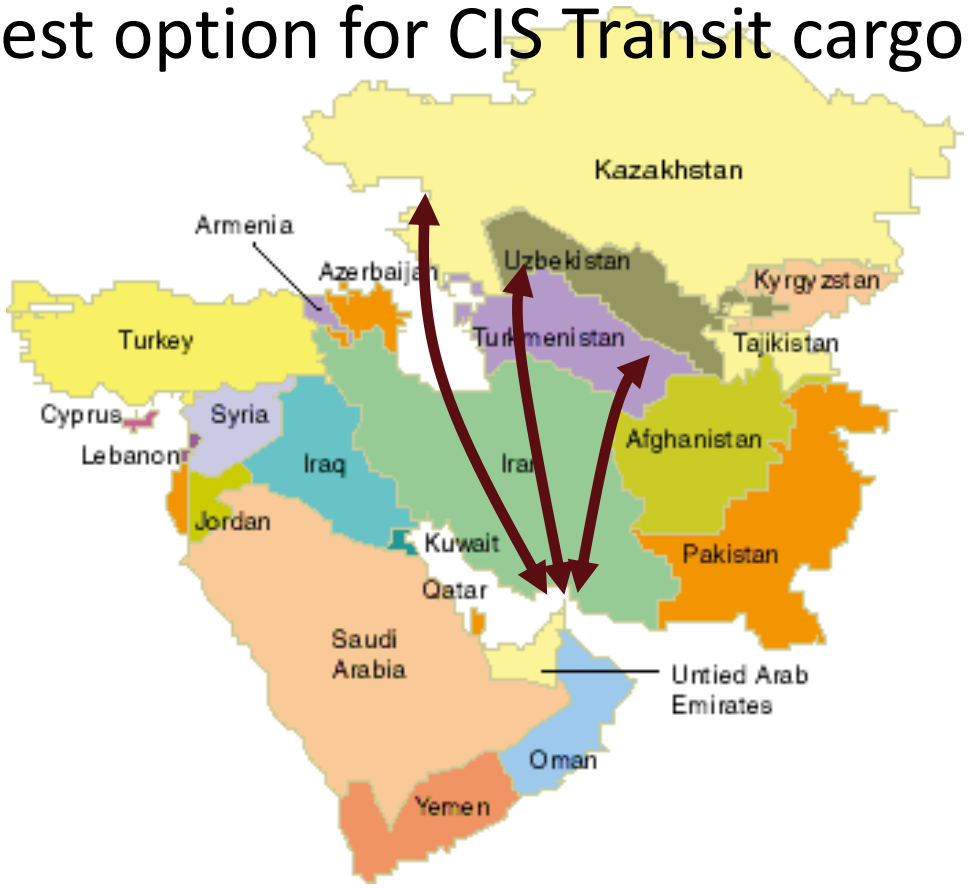
- Total transit in 2015: 9.6 million tons
- Oil transit in 2015: 5 million tons
- Non- oil transit in 2015: 4.6 million tons



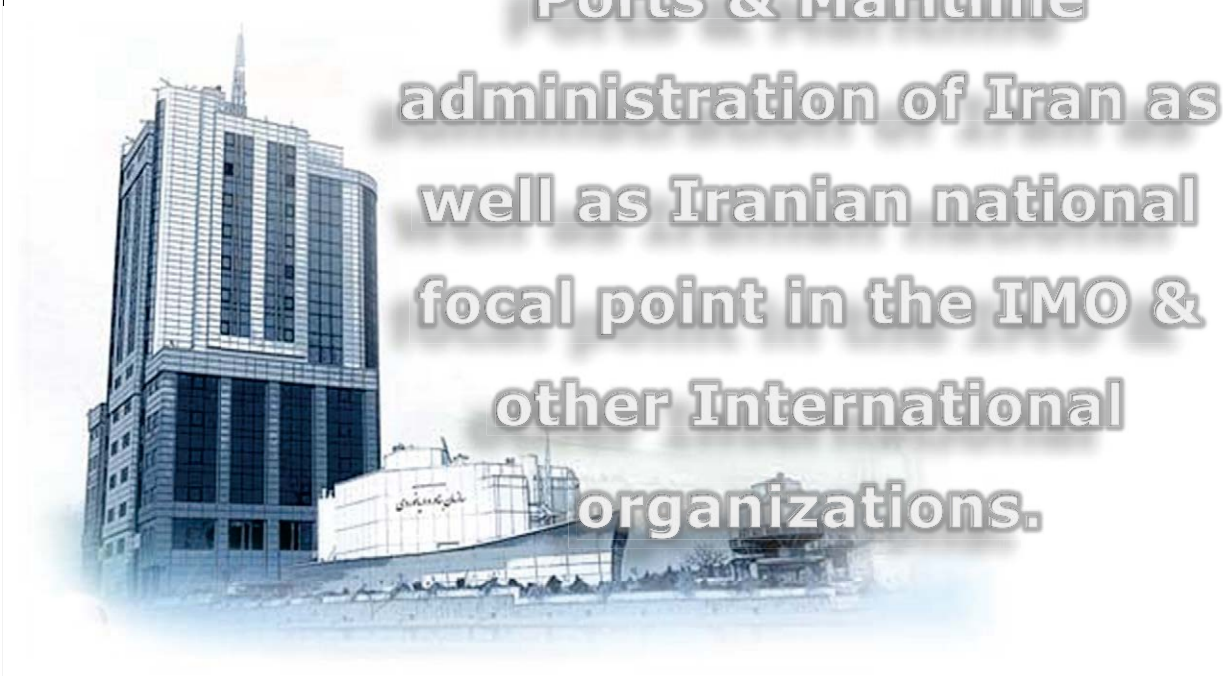
Alternative EU Trade Route



Best option for CIS Transit cargoes



Ports & Maritime Organization (PMO)



The most important responsibilities of PMO

- Operating the nations' commercial ports
- Policy-making and monitoring maritime trade and transportation
- Developing port and marine rules and regulation
- Ensuring the vessel traffic safety
- Developing the ports and utilizing maximum operating capacity
- Port management

Major policies of PMO to perform its statutory duties

- Investment in port infrastructures & superstructures
- Providing competitive services to its customers
- Increasing private and cooperative sector involvement in port and marine services
- Development of port hinterlands
- Providing customs and tax facilities
- Formulating and implementing competitive tariffs
- Improving port safety and security

PMO objectives for private sector participation (PSP) in developing ports

- Promoting the role of Iranian ports in global Supply chain
- Trade and economic development of Islamic Republic of Iran
- Developing safe, cheap, effective, and efficient maritime transport
- Creating an attractive and dynamic environment for customers and investors

Actions of PMO in order to attract PSP

- Adoption of the *INVESTMENT POLICY & PROCESS* in order to expedite and facilitate the absorption of foreign and domestic investors
- Converting ports of Shahid Rajaee, Bushehr, Amirabad, Nowshahr & Imam Khomeini to Special Economic Zones
- Converting ports of Anzali and Khoramshahr to Free Economic Zones
- Delegating the authority of PMO's top management to provincial administrators in order to facilitate private sector investment

Actions of PMO in order to attract PSP-continued

- Developing Imam Khomeini, Shahid Rajaee & Amirabad port areas to 11000, 4900 & 2000 hectares respectively
- Allocating of more than 2229 hectares of port back up areas to private sector
- Adding of Negin Island to Bushehr Port Special Economic Zone
- Allocation & preparation of the lands and dredging the entrance and basin of Persian Gulf Port in Bandar Abbas to construct required terminals for bunkering , oil and mineral handling

Shahid Rajae Port



Area	4900 hec.
Port Capacity	90 million tons (annually)
Container Terminal Capacity	3.300،000TEU (6.000.000 TEU up to 2016)
Warehouse /Hangar	24 hec.
Open Yard	220 hec.
Rail	**45 km**
Draft	8 – 17 m
Berth	40

The most important port development plans of PMO

Shahid Rajaee Container Terminal Development Plan- Phase 2

- Dredging: 7 million cubic meters
- Site area: 670,000 m²
- Providing terminal equipment: 18 Post Panamax cranes + 45 transtainer
- Investment: $450 million

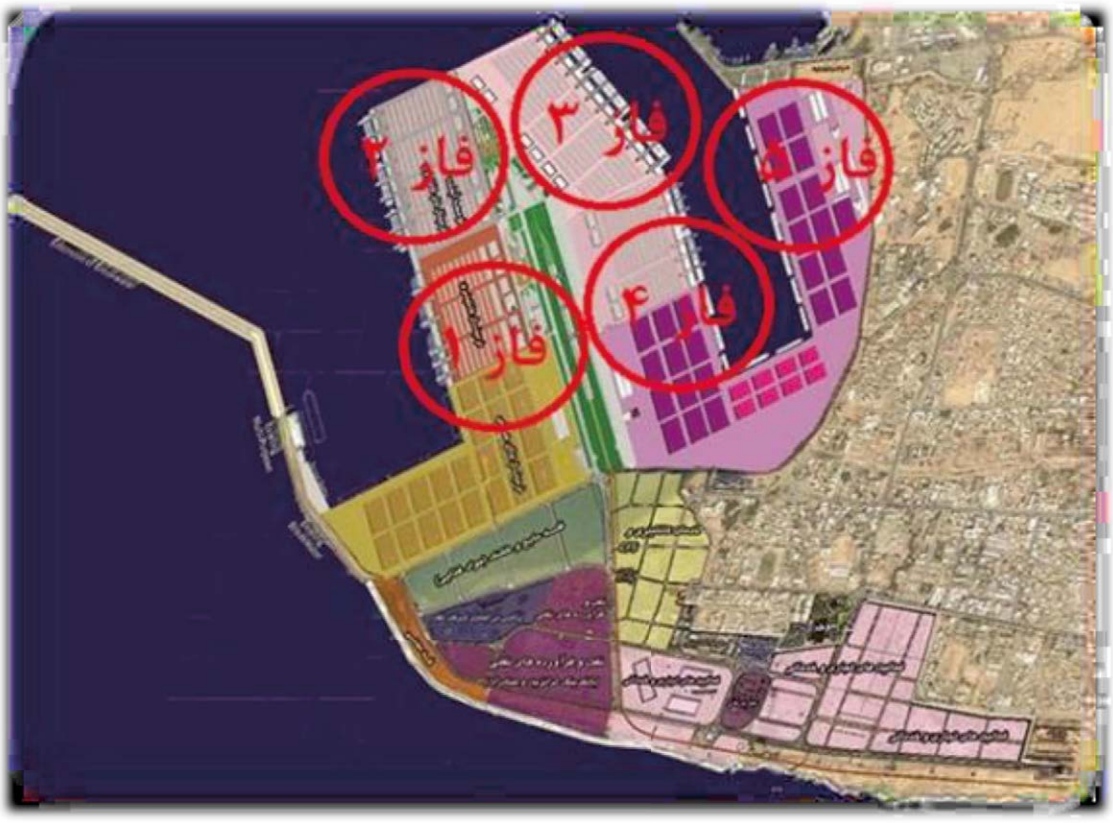
The most important port development plans of PMO- Continued

Shahid Rajaee Container Terminal Development Plan- Phase 3

- Construction of a berth with the length of 1500 meters and a draft of 16 meters
- Dredging: 5 million cubic meters
- Site area: 550,000 m²
- Providing terminal equipment: 8 Post Panamax cranes & 20 transtainer
- Investment: $450 million

Chabahar Port



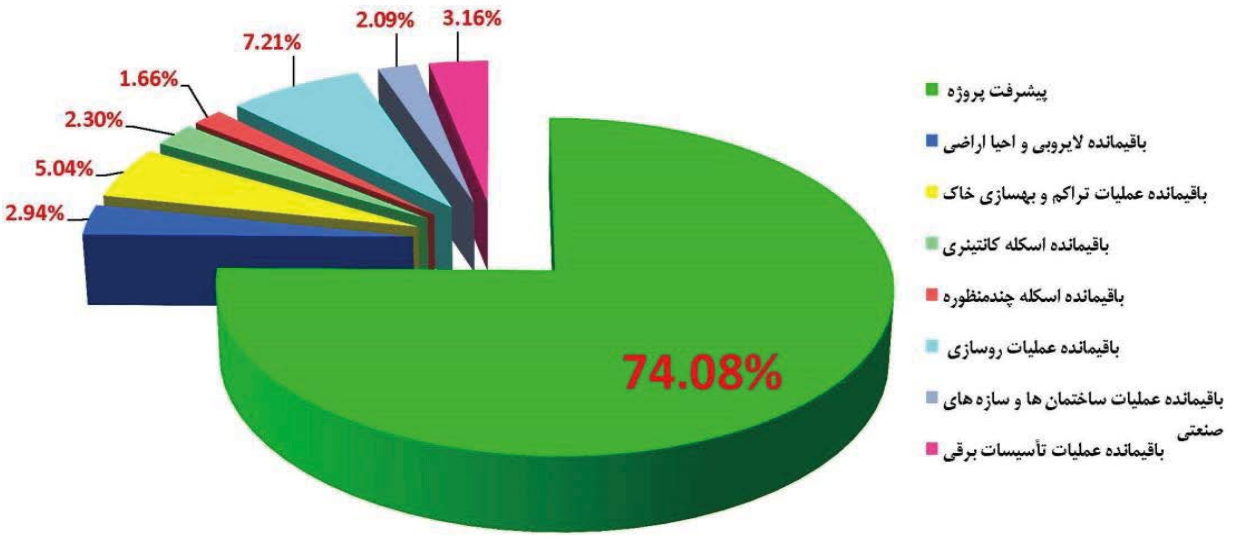


The most important port development plans of PMO- Continued

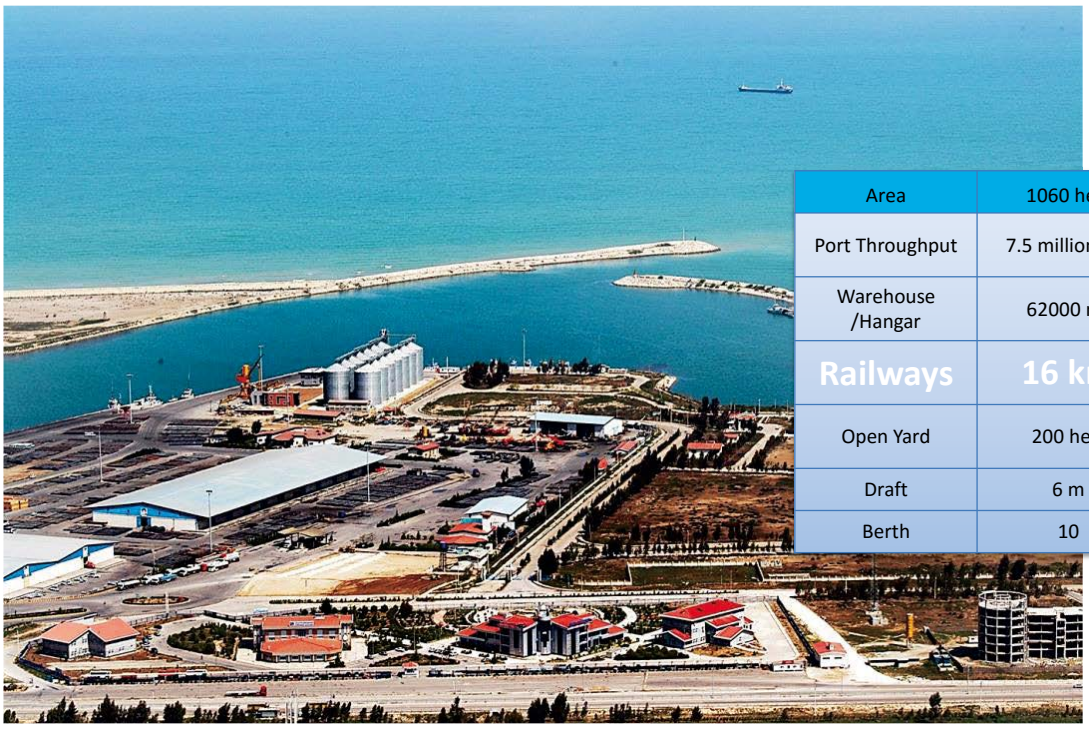
Port of Shahid Beheshti Development Plan(Chabahar)- Phase 2

- Construction of three container berths with the length of 900 meters
- Equipment: 6 container cranes + 18 RTG
- Container yard area: 50 hectares
- Investment: $300 million

Phase 1- Progress Report
74%



Amirabad Port



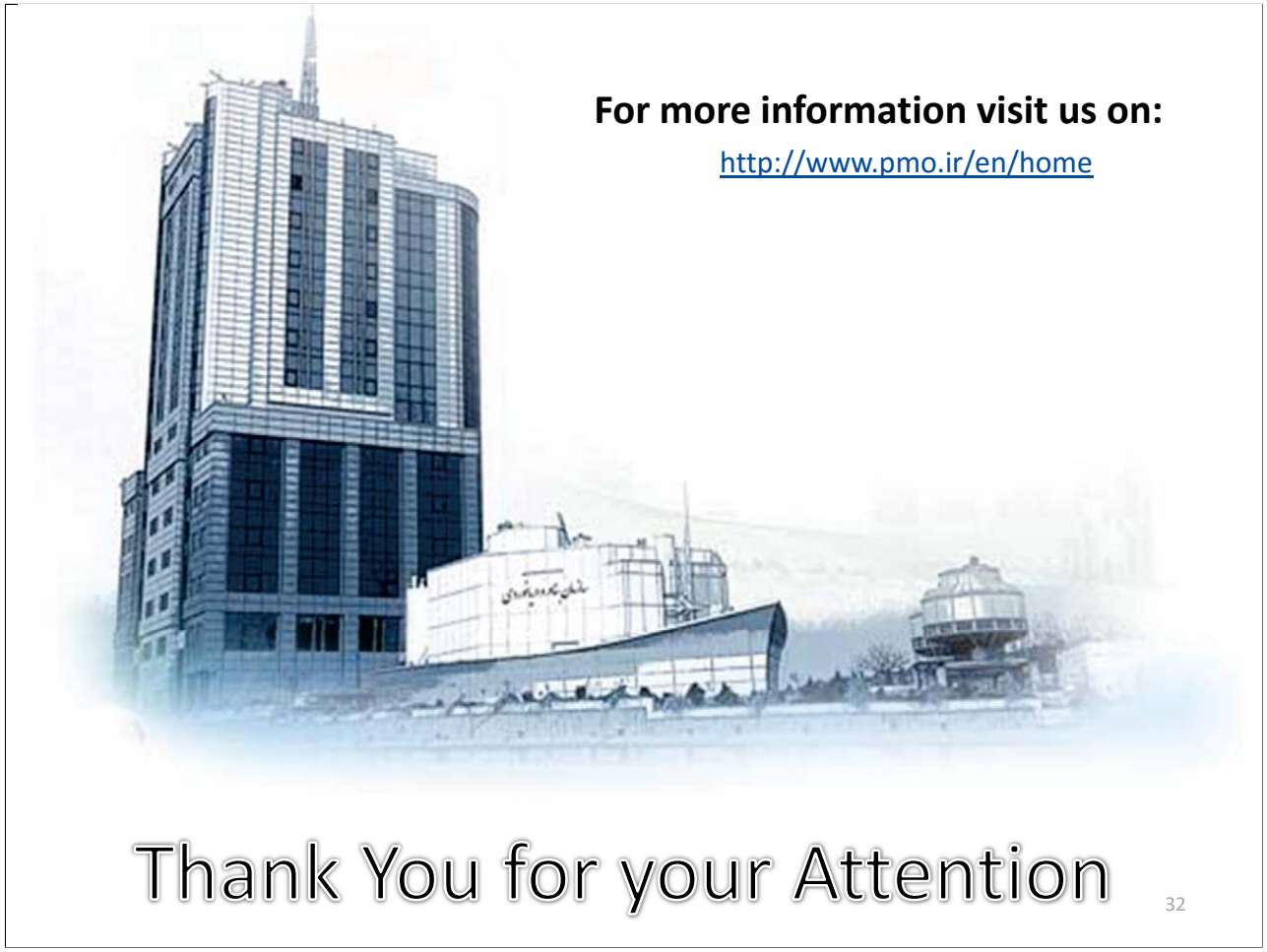
Area	1060 hec.
Port Throughput	7.5 million ton
Warehouse /Hangar	62000 m^2
Railways	**16 km**
Open Yard	200 hec.
Draft	6 m
Berth	10

The most important port development plans of PMO- Continued

Amirabad Port Complex Development Plan

- Construction of a quay wall with the length of 2630 meters
- Dredging: 5 million cubic meters
- Reclamation of 26 hectares of land
- Construction of a berth with the length of 2700 meters
- Investment: $173.5 million





For more information visit us on:

http://www.pmo.ir/en/home

Thank You for your Attention

주제2

이란 해양산업과 해양과학기술

Presentation 2

I.R.of IRAN Maritime Industries
Capabilities, Potentials and Future plans

- Mohammad Saeed Seif
(Director, Marine Industries Technology Development Council,
Vice-Presidency for Science and Technology)



I.R.of IRAN Maritime Industries
(Capabilities, Potentials and Future plans)

Iran-Korea Economic Forum (July 2016 – Busan)







Mohammad Saeed Seif

Maritime Industries Technology Development Council

Vice-Presidency for Science and Technology

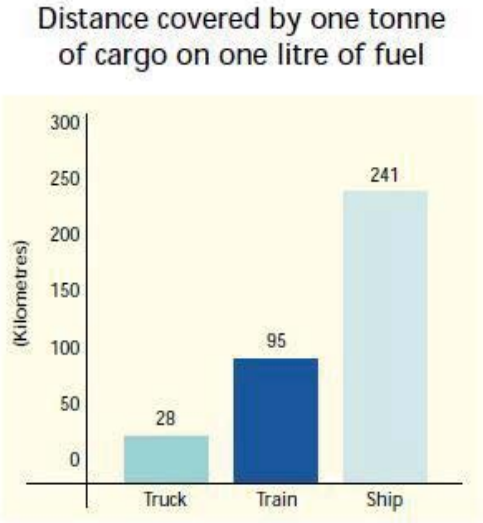


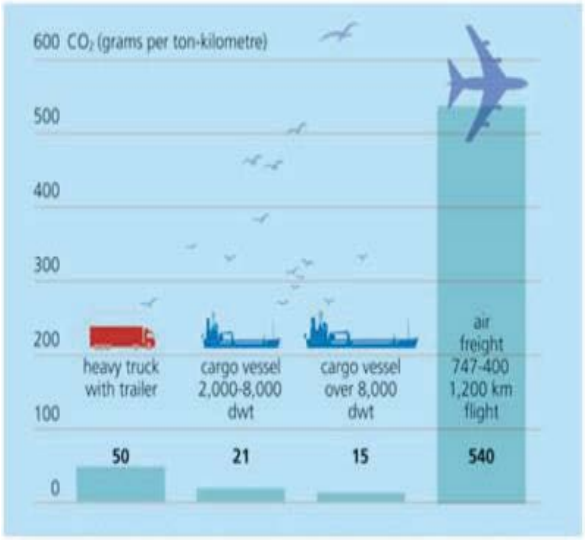
International importance of maritime industries

ستاد توسعه فناوری و صنایع دانش بنیان دریایی

ریاست جمهوری
معاونت علمی و فناوری

Marine transportation compared with air freight and heavy trucks with trailers.





ستاد توسعه فناوری و صنایع دانش بنیان دریایی

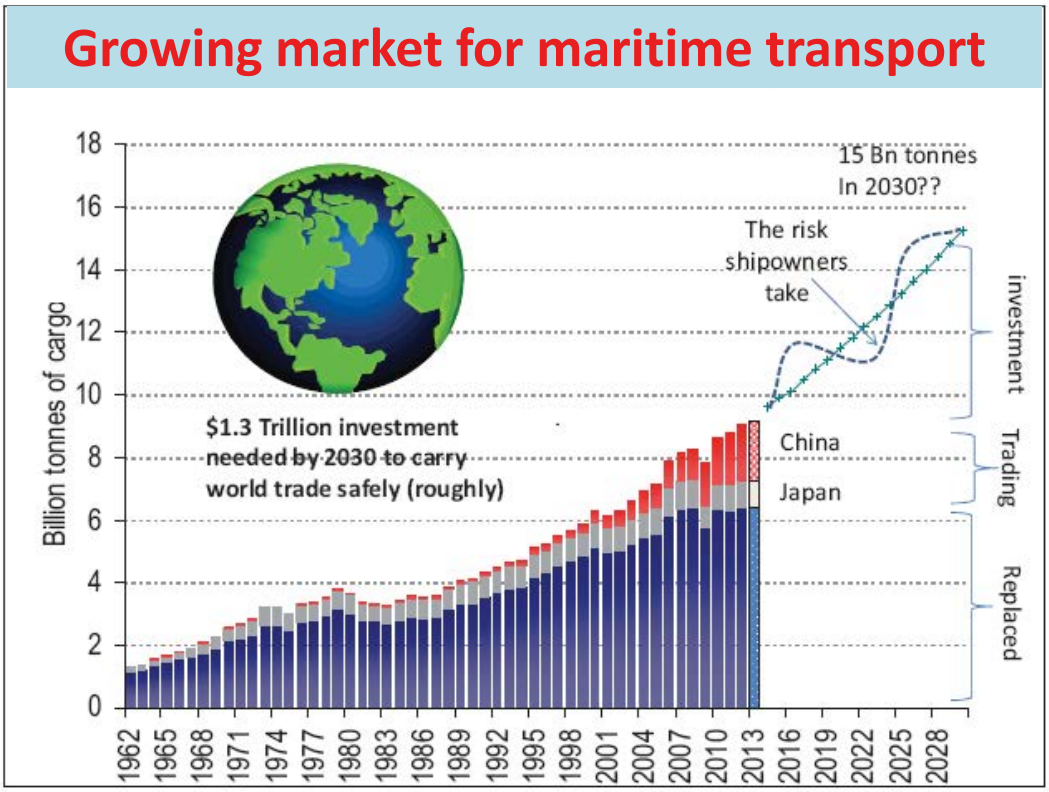
ریاست جمهوری
معاونت علمی و فناوری

Marine Transportation

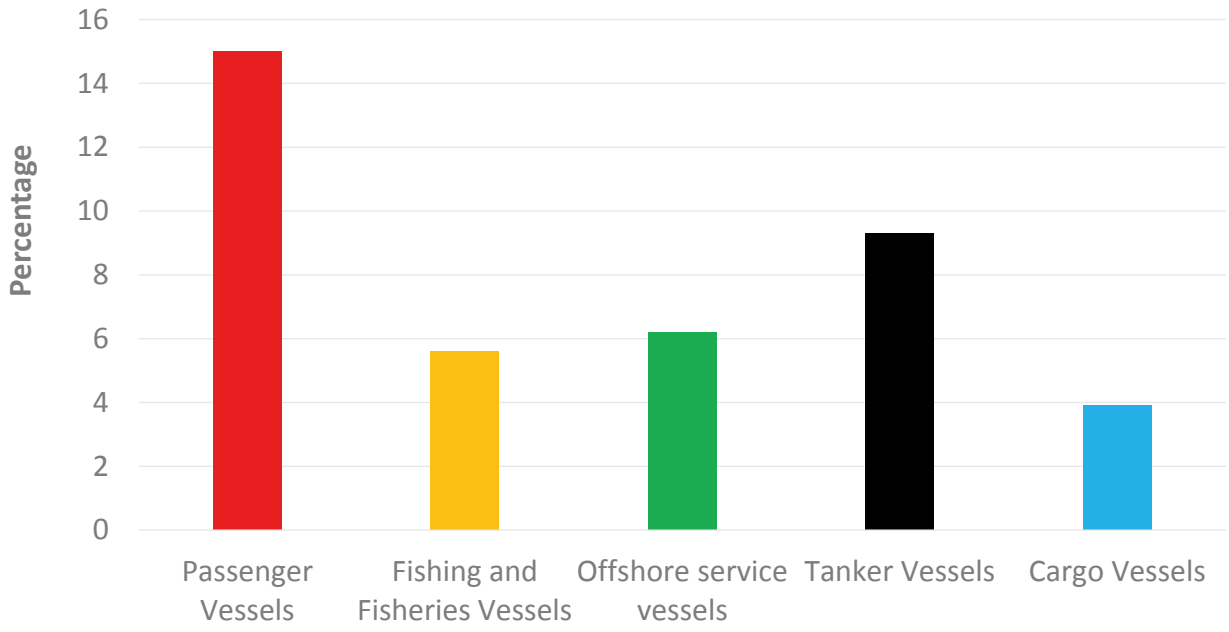


ستاد توسعه فناوری و صنایع دانش بنیان دریایی

Growing market for maritime transport



ستاد توسعه فناوری و صنایع دانش بنیان دریایی



The Growth of Iranian Vessels in 5 main categories - 2005 to 2014



Importance of maritime industries for Iran

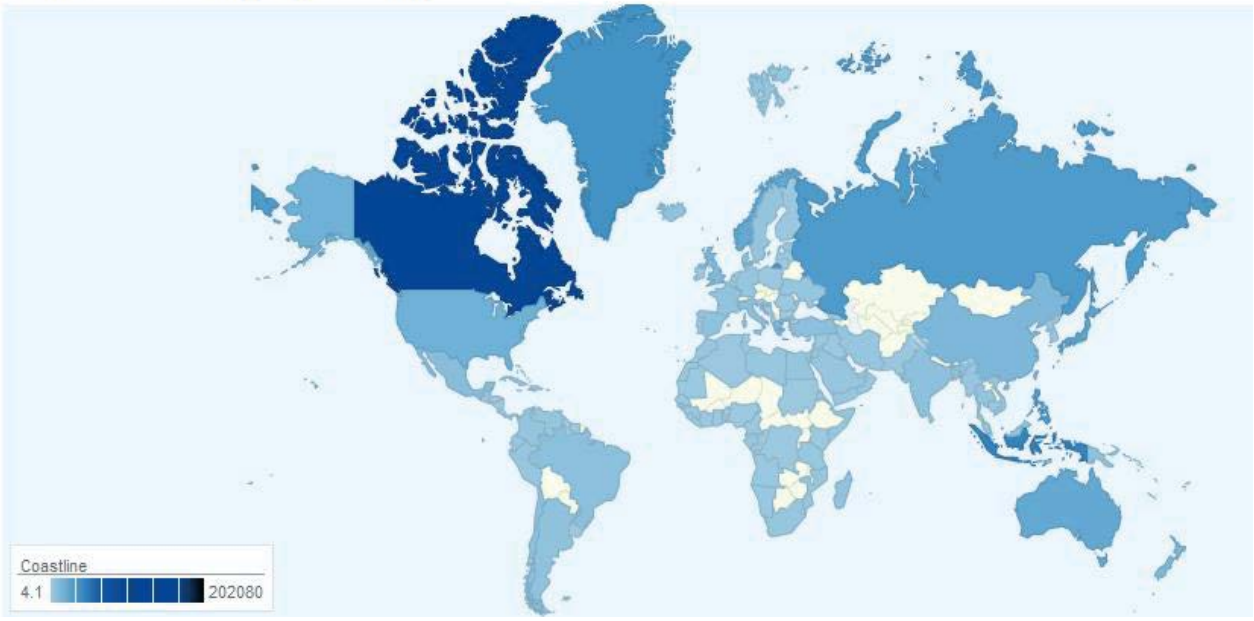


Iran's geopolitical situation

Iran has more than 5000 kilometers of coast line in north and south which not only make marine transportation possible, but also turn the country into a bridge between two strategic regions in the world i.e. Caspian Sea to Persian Gulf and high seas.

In addition to proper route for transportation, seas contain various types of natural resources including oil and gas. In this regard, Persian Gulf and Caspian Sea are both among the most important marine regions in the world.

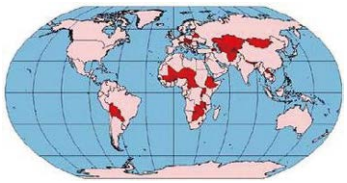
Length of Coastline by Country

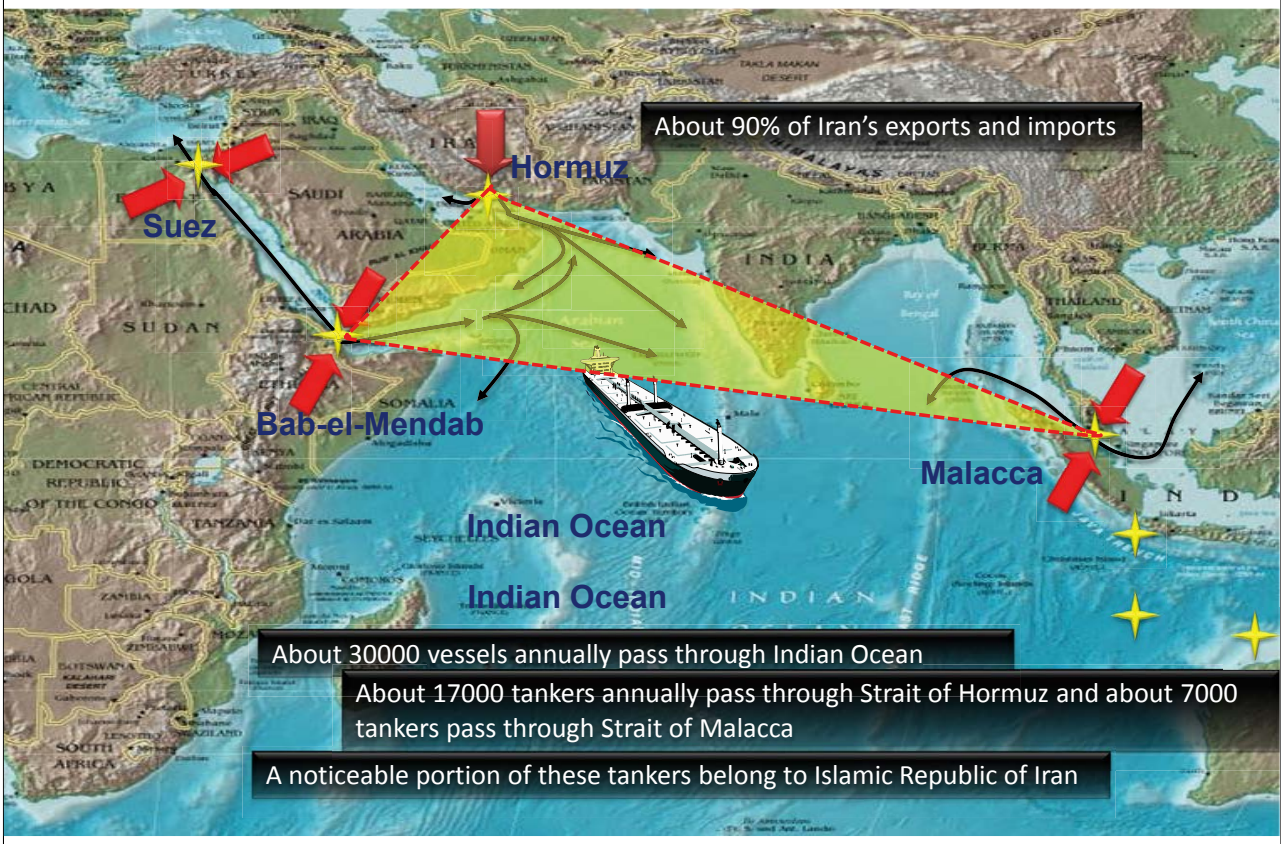


ستاد توسعه فناوری و صنایع دانش بنیان دریایی
ریاست جمهوری
معاونت علمی و فناوری

More than 400 million population are in landlocked countries of Central Asia



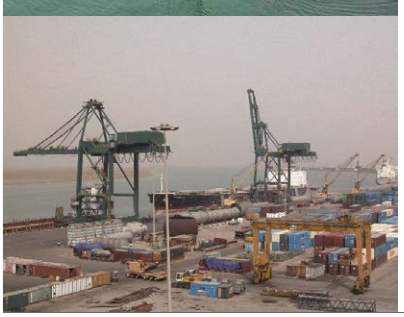










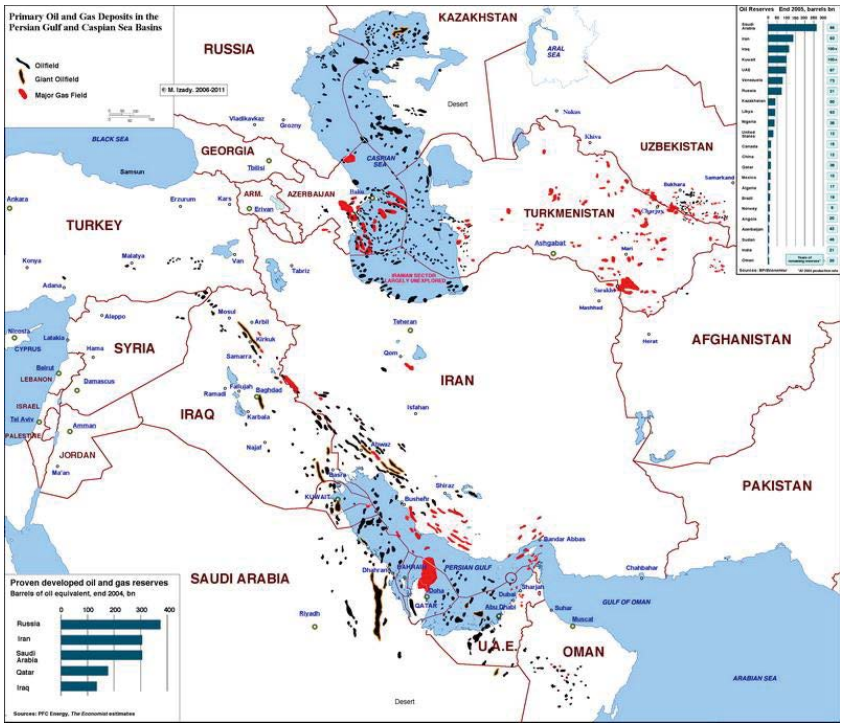


- Oceanography and marine science
- Equipment manufacturers
- Shipbuilding
- Coastal and offshore structures
- Shipping and Port Services
- Mining and marine reserves
- Fisheries and Aquaculture
- Marine tourism
- Environment
- Safety and Standardization
- Training and Research
- Navy

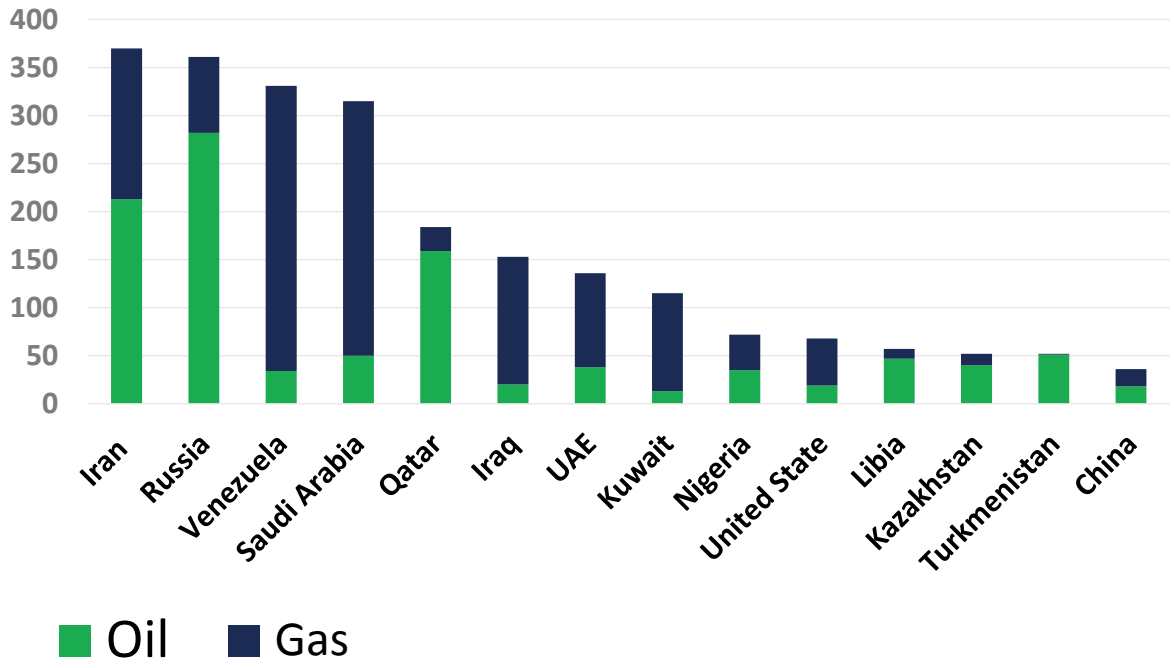
Iran Maritime industries

ستاد توسعه فناوری و صنایع دانش بنیان دریایی

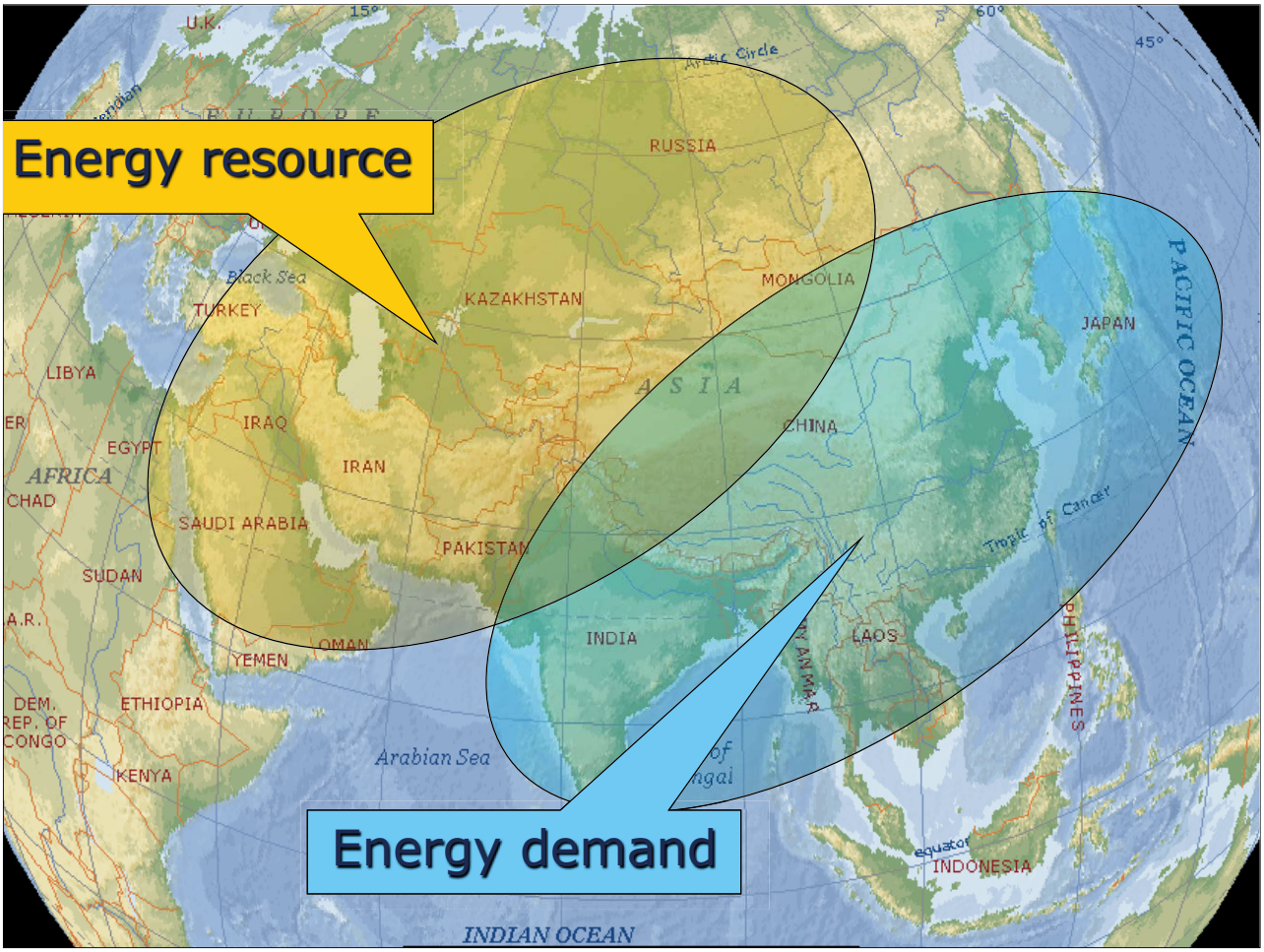
Offshore oil and Gas Resources



ستاد توسعه فناوری و صنایع دانش بنیان دریایی



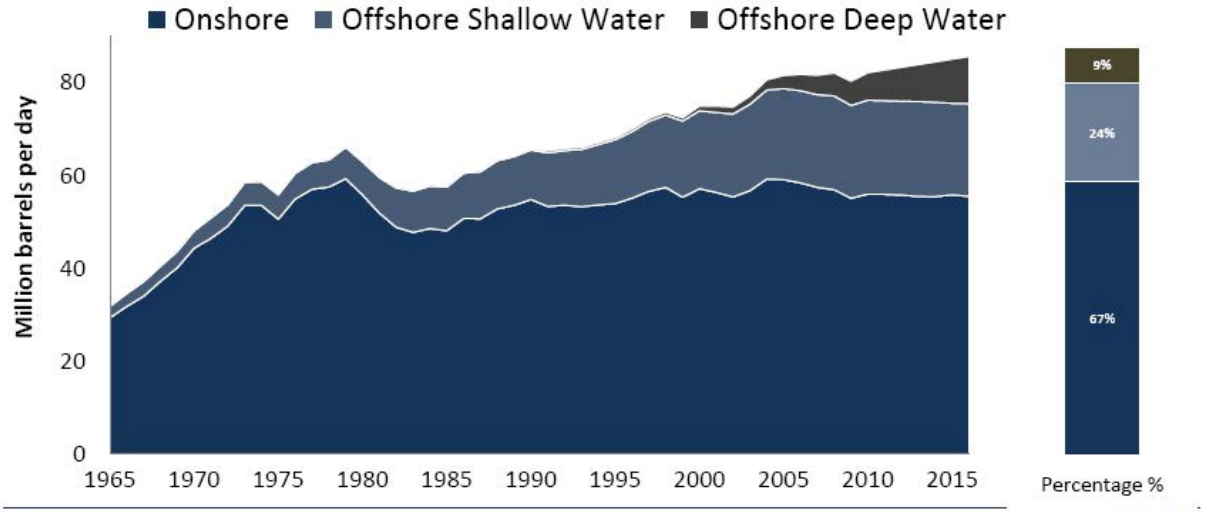
World Proved Reserved of Oil and Gas 2014 (Equivalent Billion Barrel)
Reference: British Petroleum Report 2015



Offshore Production Gains Ground…

- Onshore production has levelled-out
- More E&P activity is taking place in deeper waters, remote locations & harsh climates.
- 30% of the world's oil production comes from offshore areas

Onshore vs. Offshore Oil Production



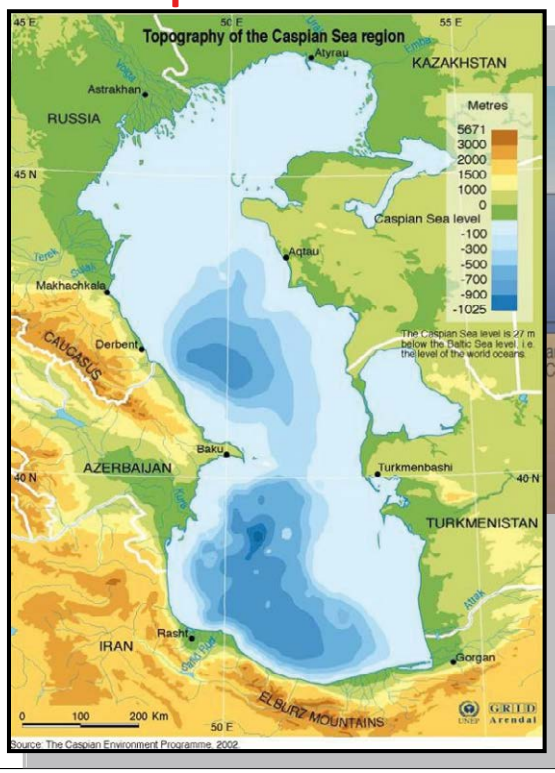
Sources: Infield Systems, BP

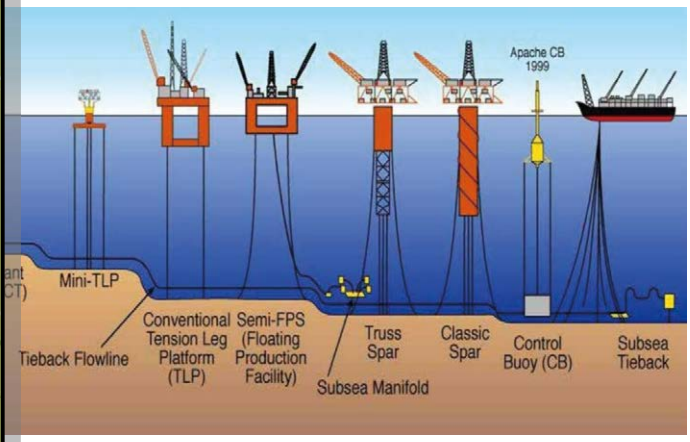
infield
THE ENERGY ANALYSTS

ستاد توسعه فناوری و صنایع دانش بنیان دریایی

ریاست جمهوری
معاونت علمی و فناوری

The importance of oil and gas resources in deep waters

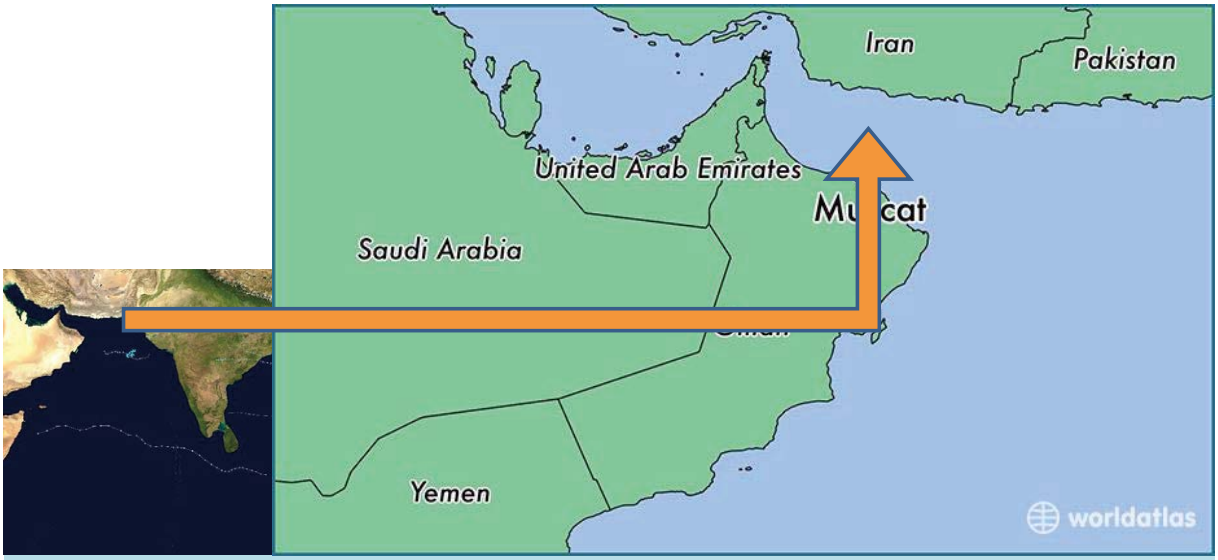




ستاد توسعه فناوری و صنایع دانش بنیان دریایی

ریاست جمهوری
معاونت علمی و فناوری

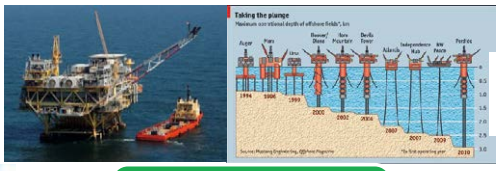
The importance of Makran coast in Iran



The need to develop this area,

based on marine activities potentials

Iran's Strategic Goals



exploitation of offshore energy resources



Development of fishing activities and fisheries





Shipping and transit of goods and passengers



Maritime security and the presence in important regions

The need for development of maritime industries





Coastal development and population policies



Iran‘s Maritime capabilities

At present, The country is highly active in its northern and southern both in offshore and coastal areas. These activities consist of oil related operations, maritime transportation, coastal and offshore tourism and associated industries. Iranian government invested very much in marine activities which are aimed to develop coast line of the country.

Although, the country still need to obtain novel technologies, but there have been numerous achievements secured by Iranian specialists which indicates internal marine potential.

High Capability in the design and construction of offshore structures









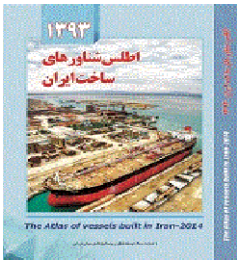










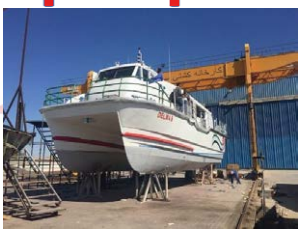


Shipbuilding and ship repair





















Shipyards







Floating docks







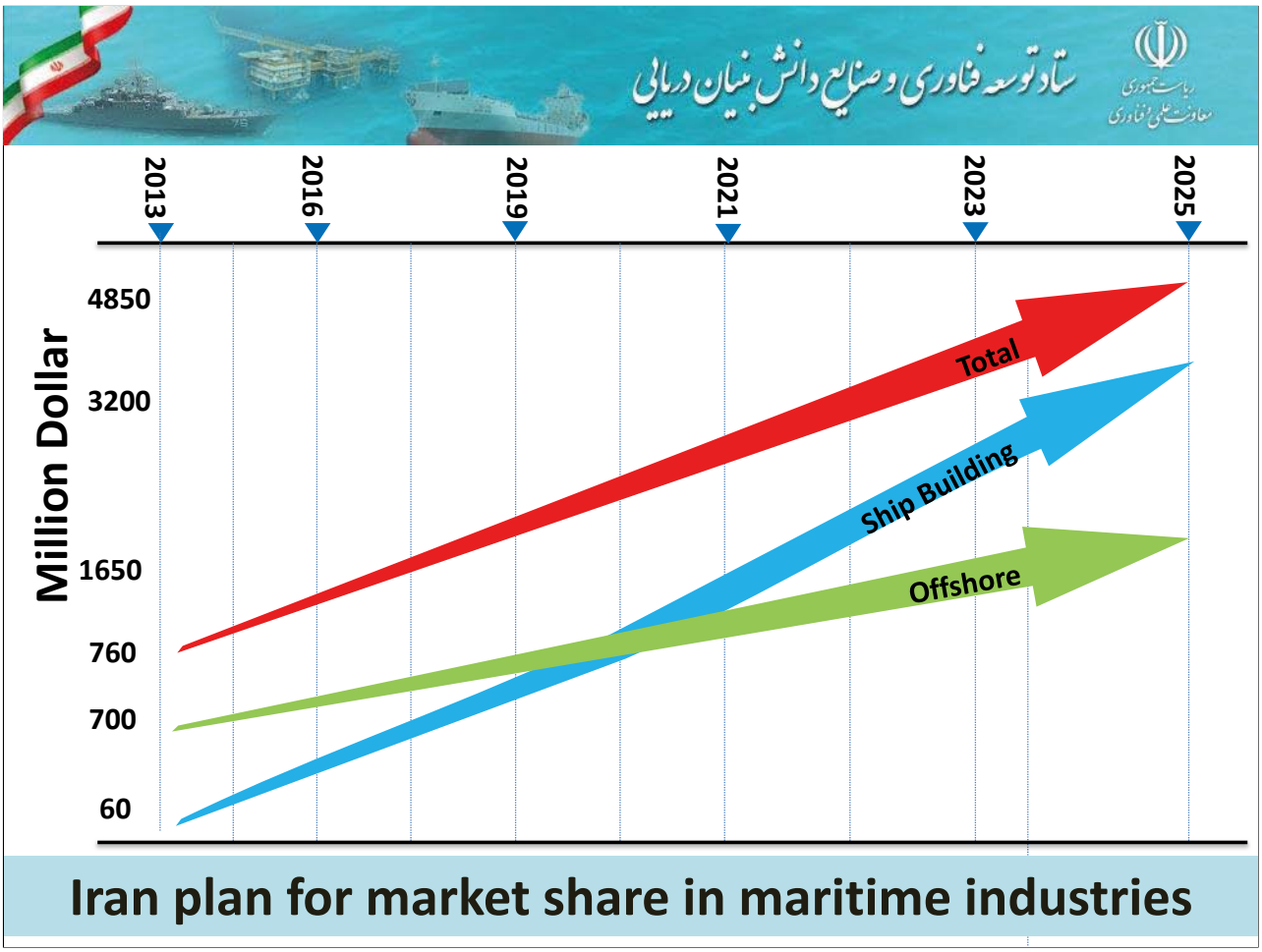
The biggest ship built in Iran

250 meters long, 45 meters wide and 21 meters high.









Iran plan for market share in maritime industries

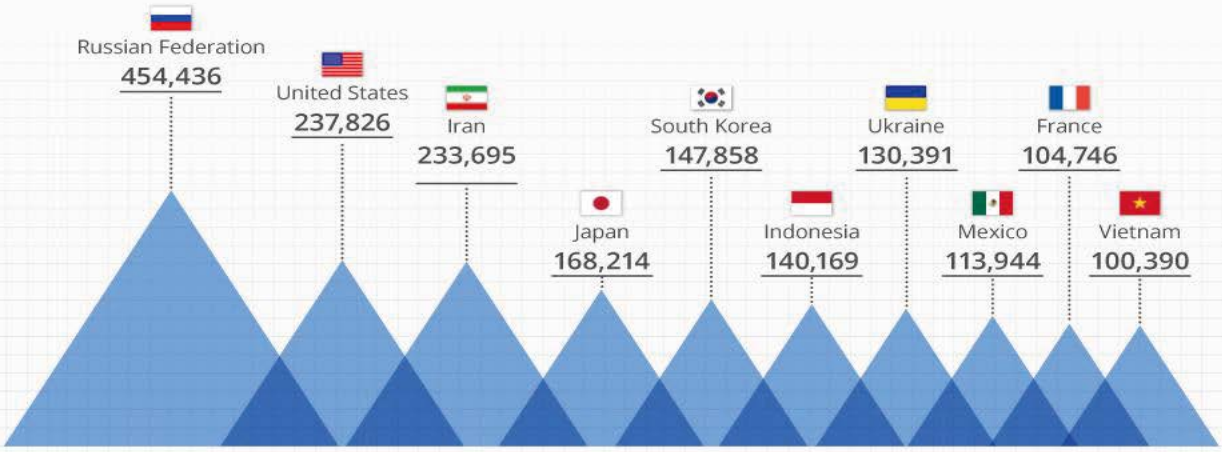


Scientific Status



The Countries With The Most Engineering Graduates

Top countries for graduates in engineering, manufacturing and construction*



* 2015 rank out of 124 economies. No data available for China, India

Sources: World Economic Forum 2015/UNESCO Institute for Statistics

Forbes statista



International rankings of Iran in the field of ocean engineering in 2015

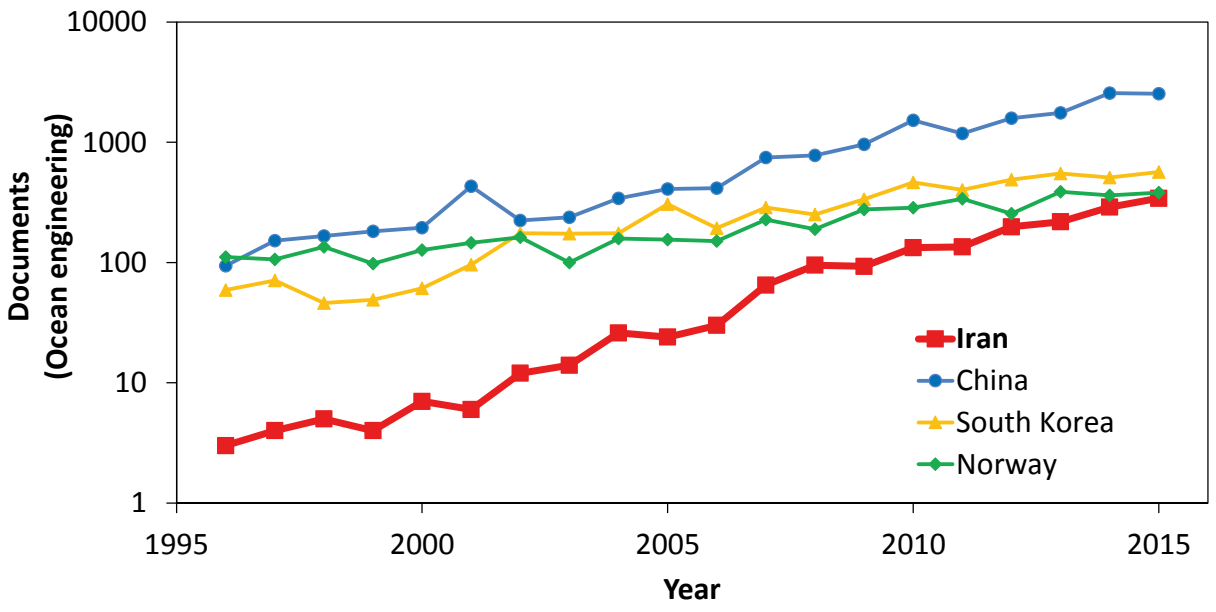
	Country	↓ Documents	Citable documents	Citations	Self-Citations
1	China	2533	2424	424	339
2	United States	1565	1389	296	163
3	India	655	640	90	39
4	United Kingdom	635	548	136	58
5	South Korea	566	552	56	23
6	Norway	381	372	53	35
7	Japan	381	372	46	18
8	Canada	363	348	33	16
9	Iran	342	326	58	33
10	Australia	300	281	92	50
11	Italy	297	277	132	72
12	Germany	282	264	116	73
13	France	257	234	75	30

Source:

SJR SCOPUS™ SCImago Journal Rank

Comparing Iran, South Korea, China & Norway

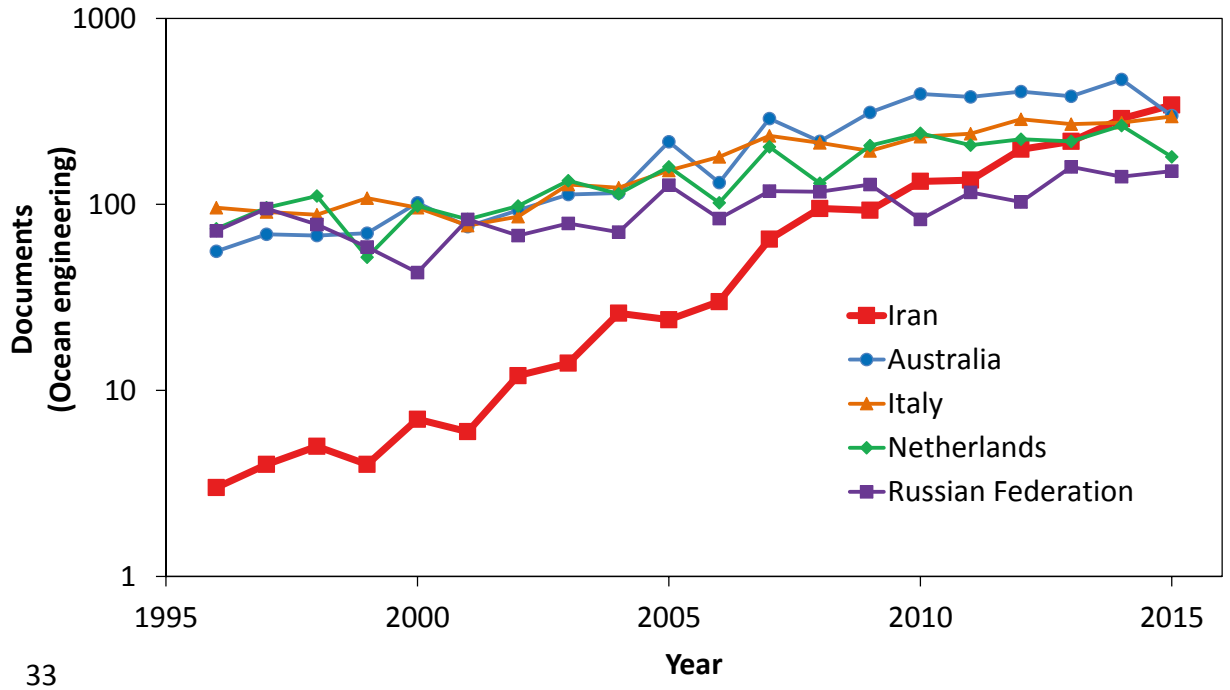
	Iran	South Korea	China	Norway
Ranking: (Ocean engineering, 2015)	9	5	1	6



Comparing Iran, Australia, Italy, Netherlands & Russian Federation

Ranking: 9 10 11 17 19

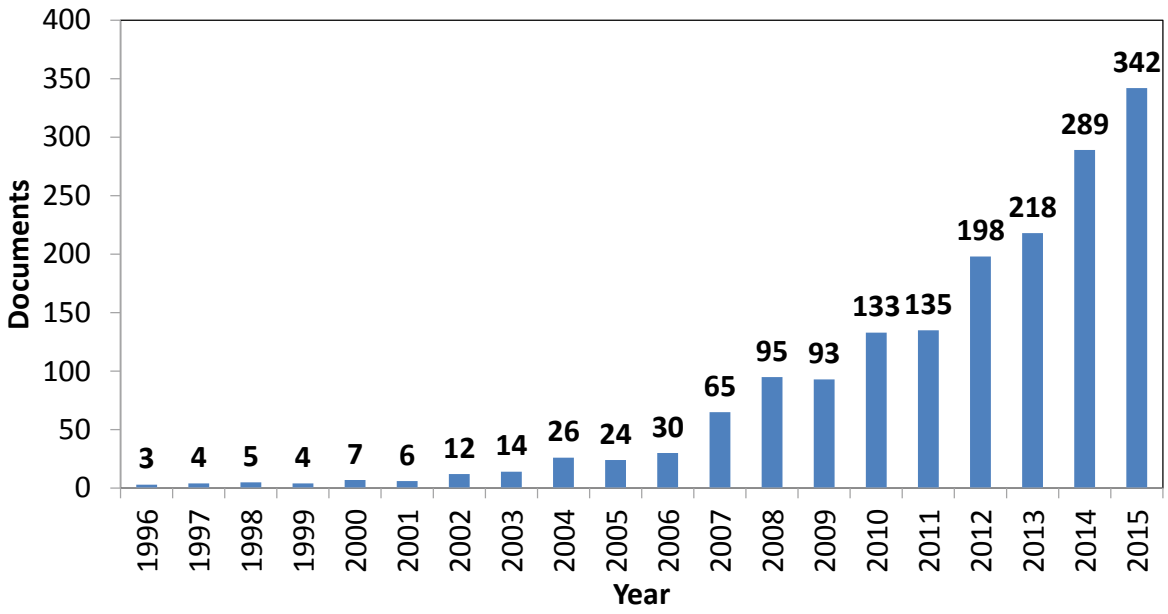
(Ocean engineering, 2015)



33



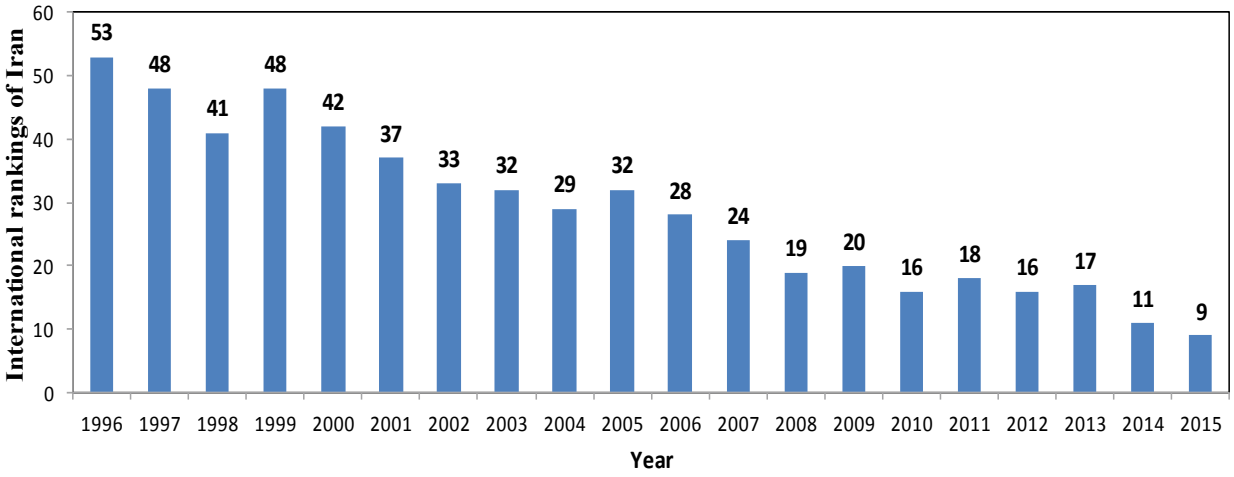
Scientific documents



34

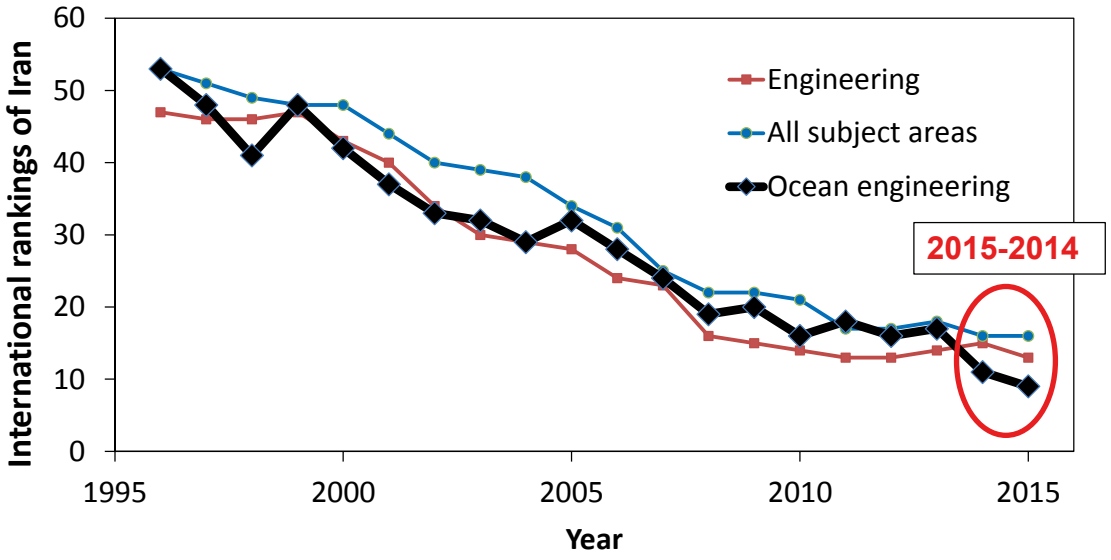


Based on Information Scimago Journal & Country Ranking, Iran has secured great achievements Ocean Engineering and enhanced its rank from 53 to 9 in last 20 years.



35



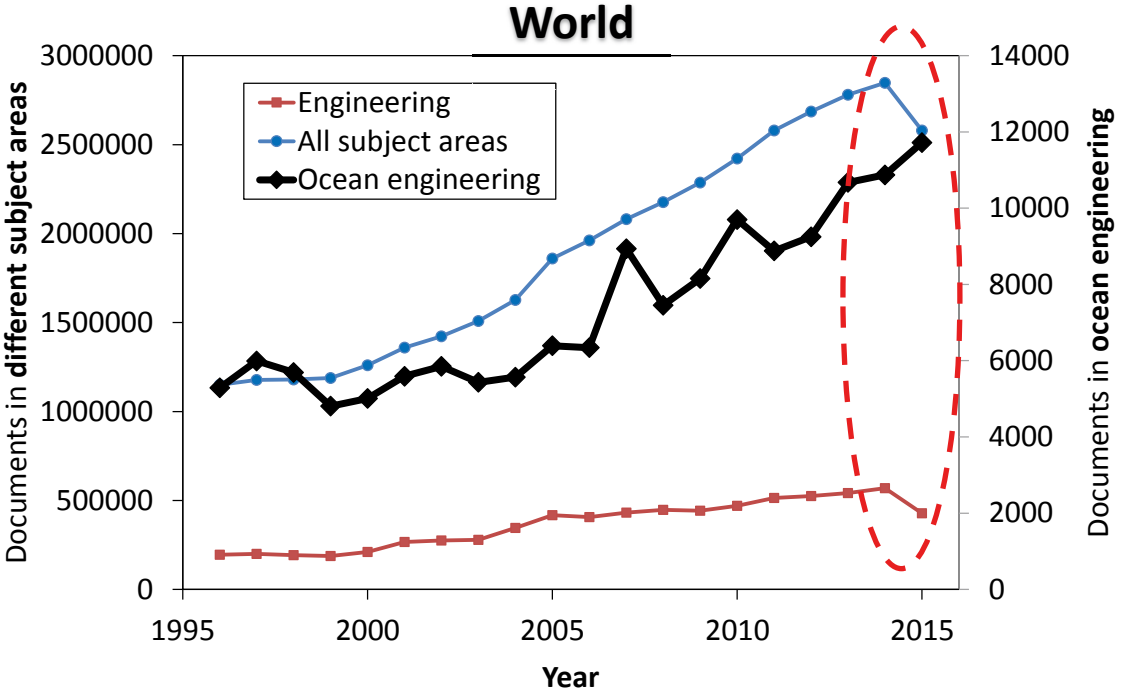


36

ستاد توسعه فناوری و صنایع دانش بنیان دریایی

ریاست جمهوری
معاونت علمی و فناوری

World

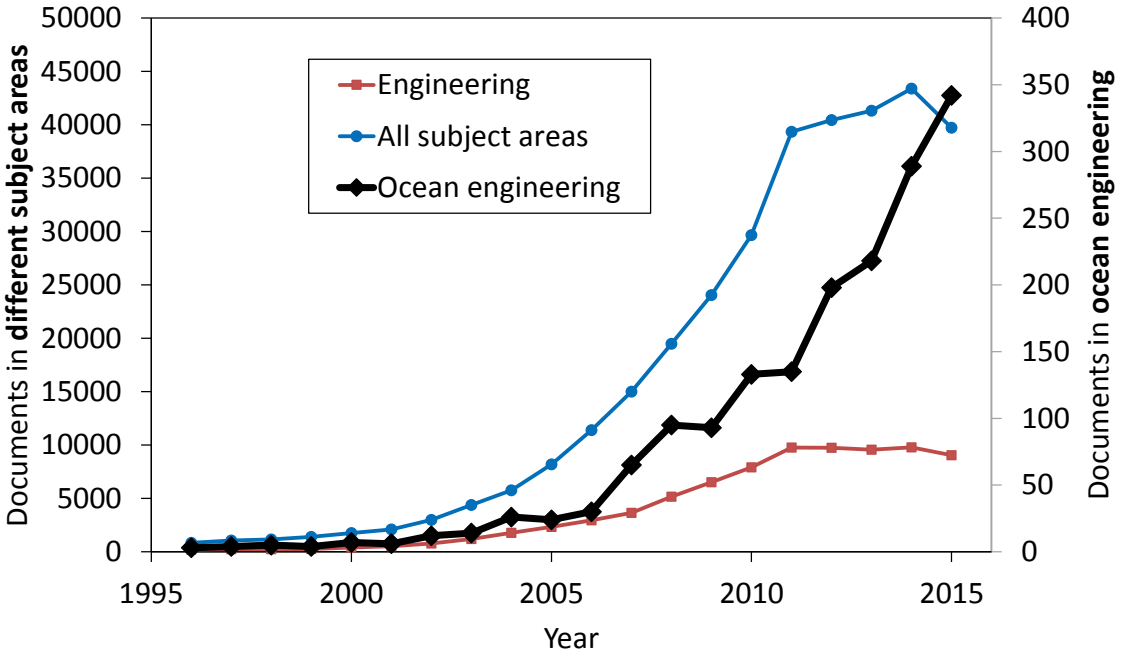


37

ستاد توسعه فناوری و صنایع دانش بنیان دریایی

ریاست جمهوری
معاونت علمی و فناوری

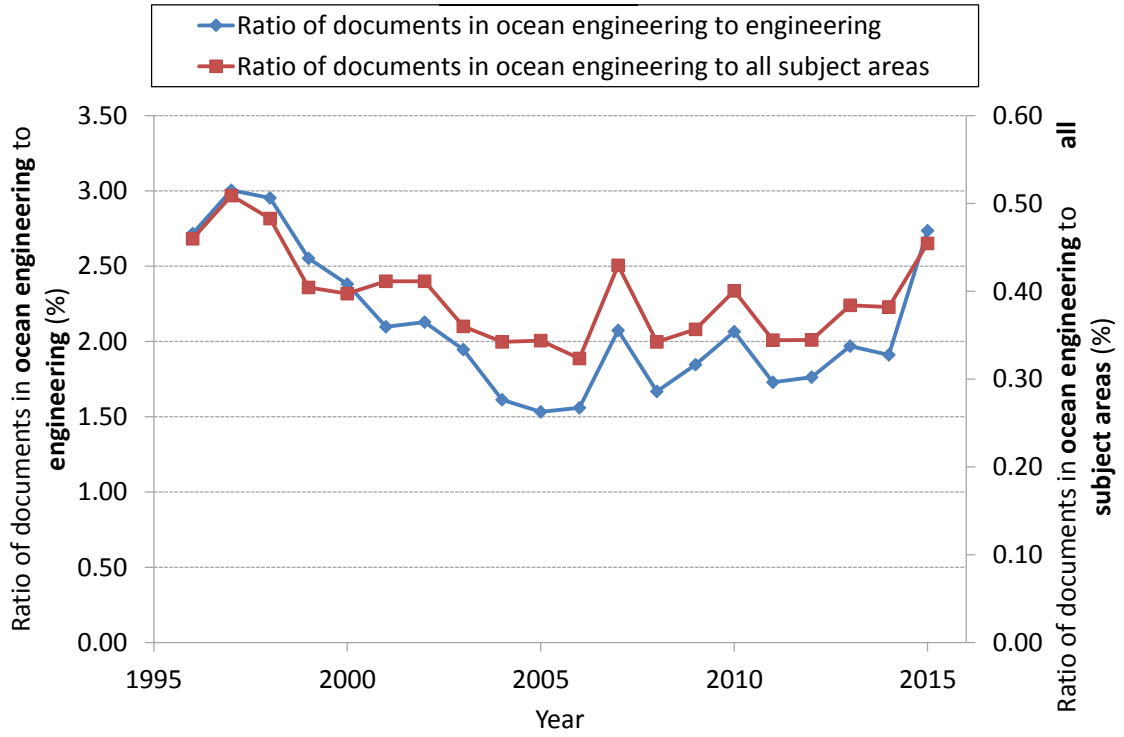
Iran



38

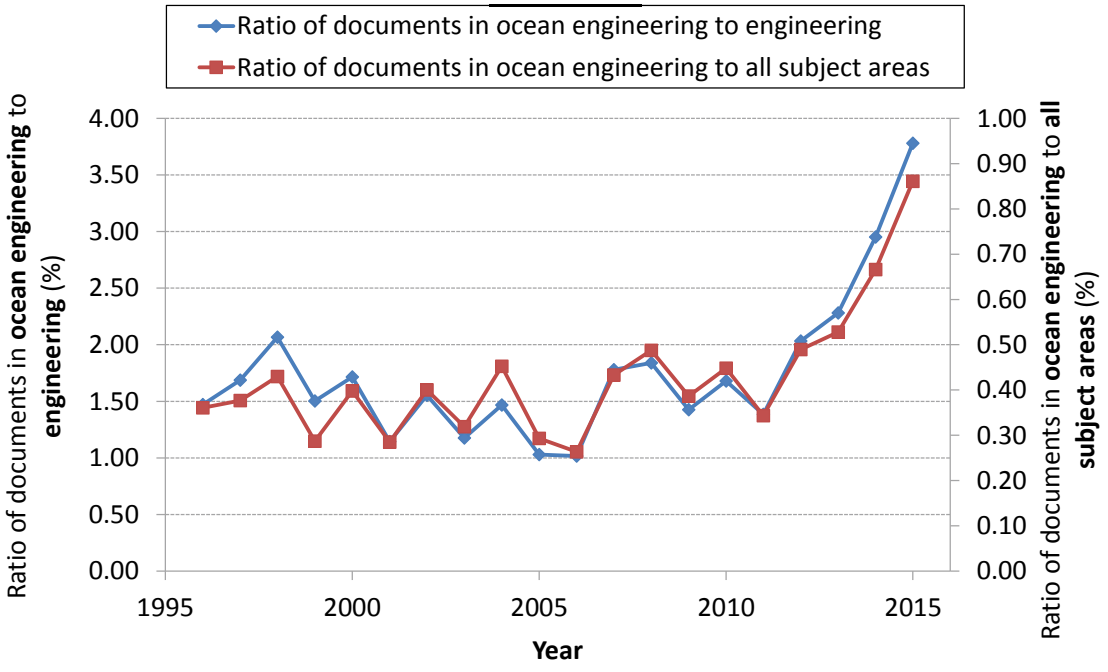

ستاد توسعه فناوری و صنایع دانش بنیان دریایی
ریاست جمهوری
معاونت علمی و فناوری

World


Ratio of documents in ocean engineering to engineering
Ratio of documents in ocean engineering to all subject areas
Ratio of documents in ocean engineering to engineering (%)
Ratio of documents in ocean engineering to all subject areas (%)
3.50
3.00
2.50
2.00
1.50
1.00
0.50
0.00
0.60
0.50
0.40
0.30
0.20
0.10
0.00
1995
2000
2005
2010
2015
Year


ستاد توسعه فناوری و صنایع دانش بنیان دریایی
ریاست جمهوری
معاونت علمی و فناوری

Iran


Ratio of documents in ocean engineering to engineering
Ratio of documents in ocean engineering to all subject areas
Ratio of documents in ocean engineering to engineering (%)
Ratio of documents in ocean engineering to all subject areas (%)
4.00
3.50
3.00
2.50
2.00
1.50
1.00
0.50
0.00
1.00
0.90
0.80
0.70
0.60
0.50
0.40
0.30
0.20
0.10
0.00
1995
2000
2005
2010
2015
Year


Thank You !

주제3

한·이란 해운 물류 협력

Presentation 3

Setting up and Strategic Cooperation in Maritime Research & Training between PMO and KMI

- Mohammad Saeed Seif
(Director General, Centre of Strategic Studies and Investigation,
Port and Maritime Organization)



Setting up and strategic cooperation in maritime Research & Training between PMO and KMI

By : Mohammad Ali Hasanzadeh
General Director of Strategic Studies & Research Center
Email: mhasanzadeh@pmo.ir

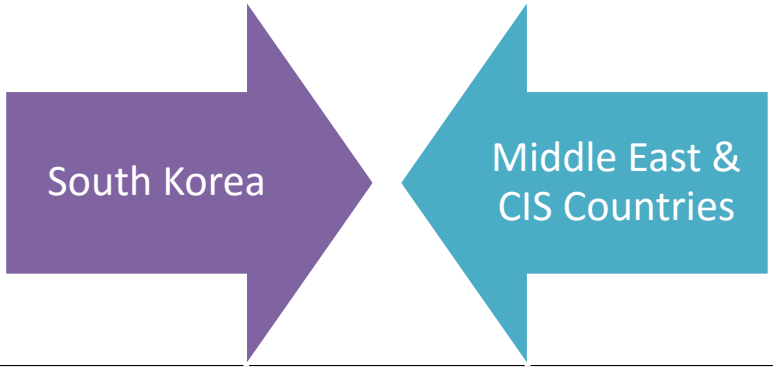
Ports and Maritime Organization

Ports and Maritime Organization (PMO) of Iran as a governmental organization that is affiliated to Ministry of Roads and Urban Development is the port authority & maritime authority also represent Iran and in the international organization such as IMO.



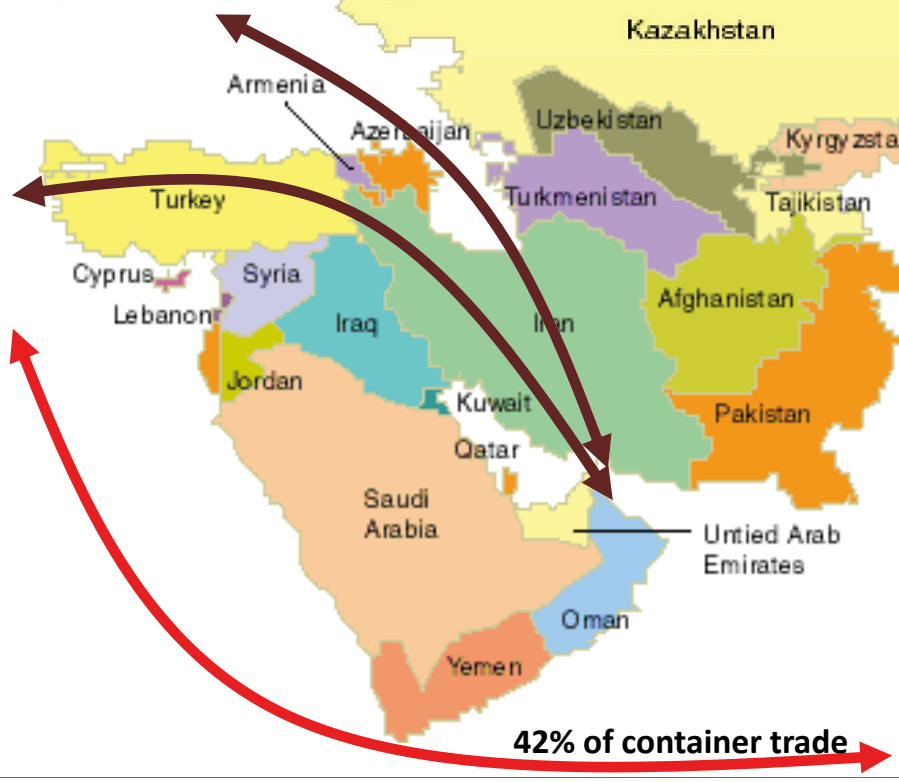
South Korea & Middle East Economic Policy

Since the mid-1970s, the economic importance of the Middle East & CIS Countries to South Korea's economy has increased gradually along with Korea's increased importance to several Middle Eastern & CIS nations.

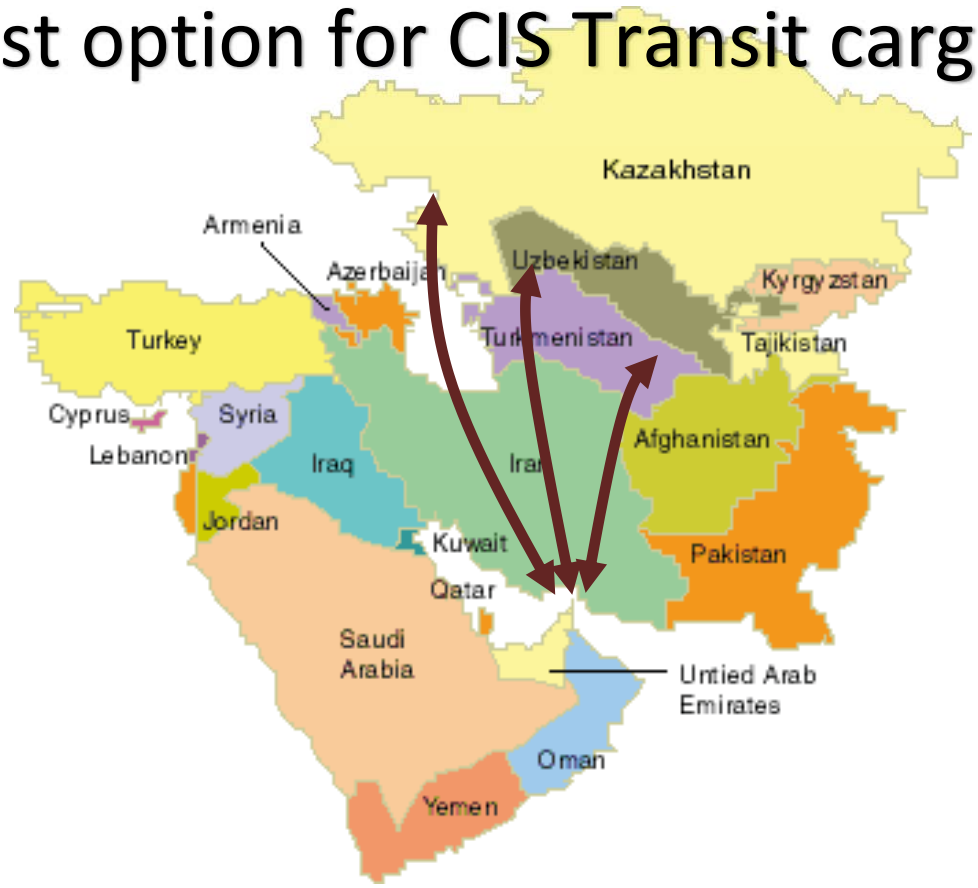


Iran's geostrategic location

Iran ports, bridge between east & west



Best option for CIS Transit cargoes



PMO & KMI

Cooperation between PMO & KMI can utilize Iran's position in transport and international trade and serve strategic & economic interests of both countries.



Horizontal integration



Maritime researches & trainings



Transfer of Maritime Knowledge



MOU between PMO & KMI



Some issues to be include in MOU between PMO & KMI

- Using the specialized, scientific, training, and research capabilities of both parties in the form of joint scientific consultations and projects in the maritime and port areas with an emphasis on the advanced and emerging technologies.
- Providing provisions to use such common facilities of both parties as the research/training spaces, equipment, and international connections.

Some issues to be include in MOU between PMO & KMI

- Mutual cooperation in the commercialization of the outcomes of the research projects, inventions, innovations, and technologies to develop entrepreneurship.
- Doing scientific/research exchange visits.
- Establishing a joint office.

Some issues to be include in MOU between PMO & KMI

- Setting up joint applied/specialized laboratories.
- Holding joint seminars, training courses/workshops, and specialized common conferences.
- Mutually using both parties' existing training/research potentials to train students and exchange faculty members.

Some issues to be include in MOU between PMO & KMI

- Providing provisions to use the facilities, equipment, and training/research spaces of both parties.
- Identifying the port and maritime potentials and studying the feasibility of investment projects.
- Cooperating in notifying and publishing joint scientific/research issues.



KMI

Coming together is a beginning, keeping together is progress and working together is success.

Henry Ford

주제4

한-이란 수산업 협력

Presentation 4

Fishery and Aquaculture development in Iran

- Hossein Ali Abdolhay
(Vice President, Iran Fisheries Organization in Aquaculture)



Fisheries and Aquaculture development In Iran

Iran Fisheries Organization

Aquaculture Department

Hossein Ali Abdolhay

10.7.2016



A view of Iran Fisheries Organization in 2014

Subject	Unit	Amount
Total Fish Products	1000 tons	947
Catch	1000 tons	575
Aquaculture	1000 tons	372
Fingerlings releasing for Stock Enhancement	Million Pieces	331
Percapita	Kg/Year	9.2
Export Value	Million $	300
Import Value	Million $	180

Different fisheries activities ranking of Iran in the world 2014

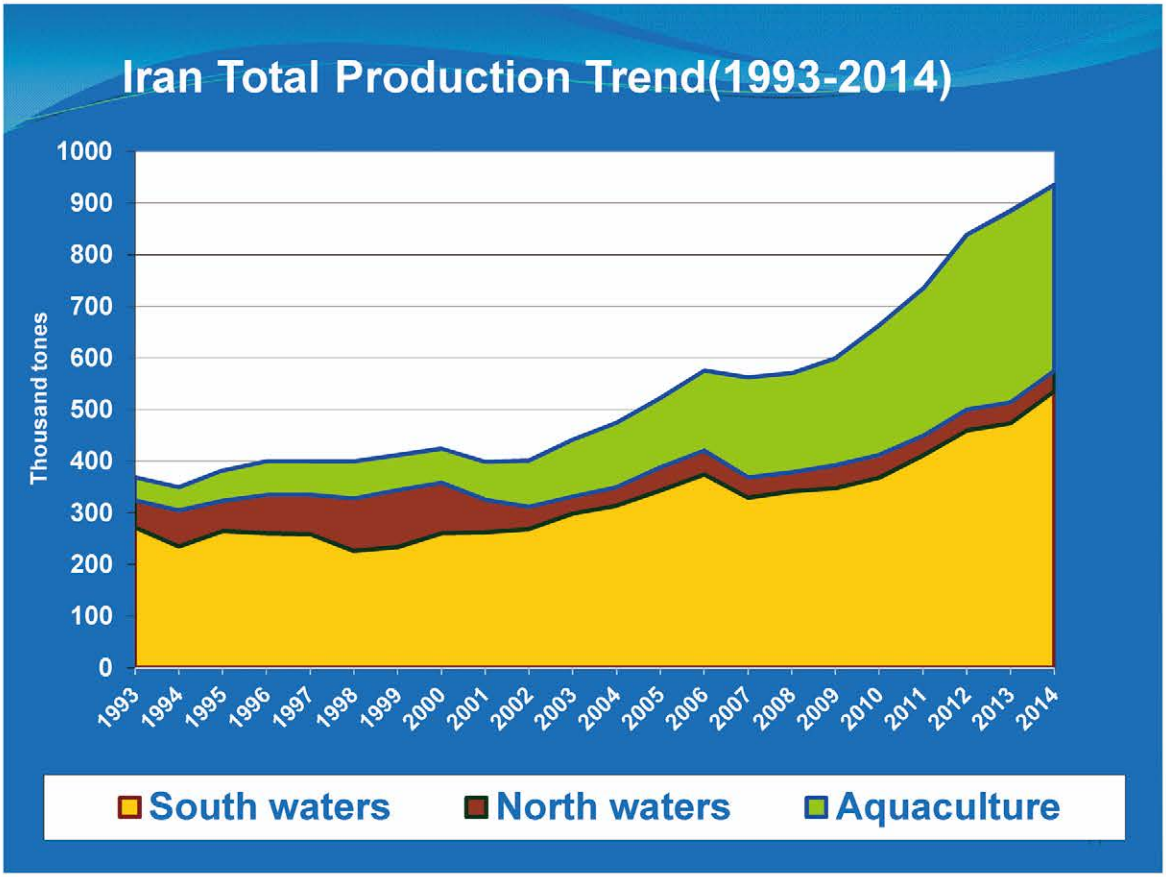
Activities	Ranking
Total Fish Products	26
Aquaculture	20
Aquaculture/ Carp	6
Aquaculture/ Trout	1
Catch	30
Tuna Catch from Indian Ocean	2

Islamic Republic of Iran Fish Products

	Fish Products / 1000 Tons		Annually Growth Rate %y
	2002	2014	
Aquaculture	90	372	12.5%
Catch	312	575	5.2%
Total	402	947	7.4%

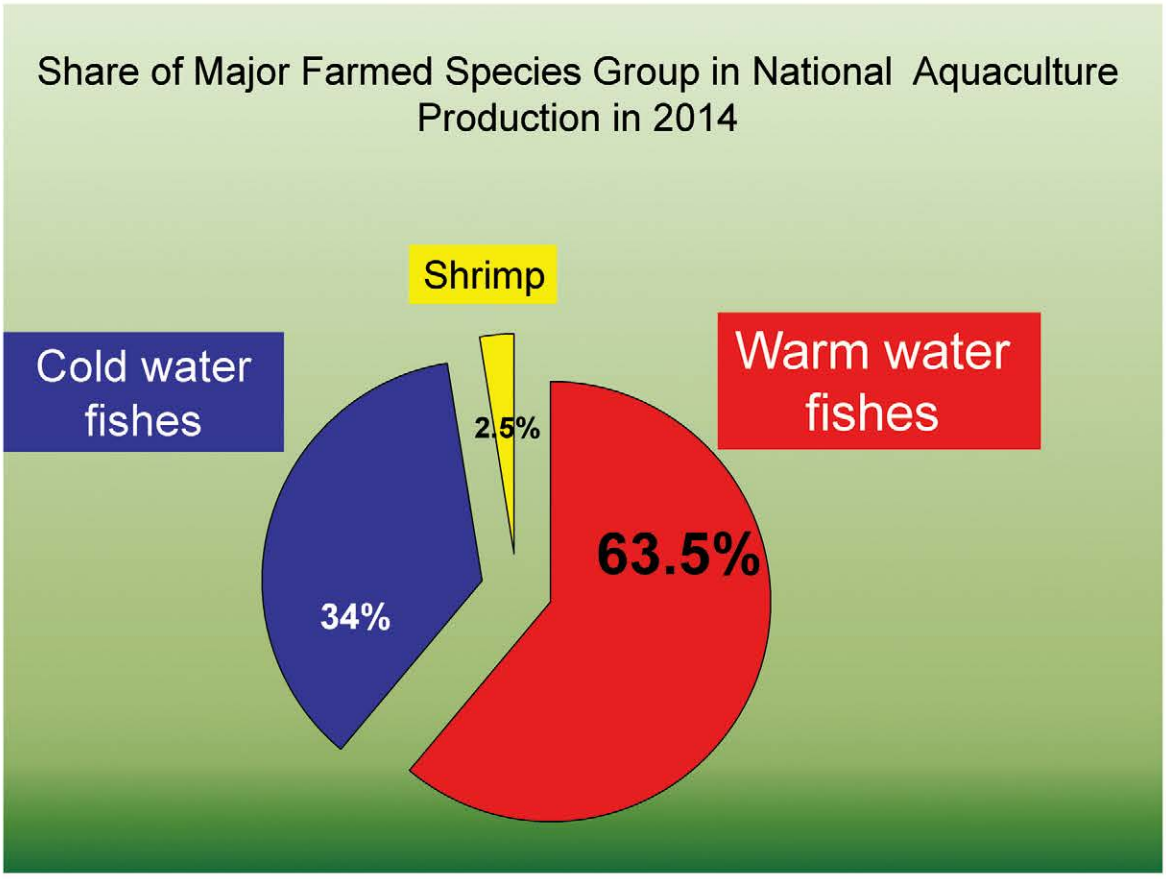
The share of Aquaculture and Catch in total product in 2014





Main group of fish products in Iran

Aquaculture	
Warm water species	Fresh water
Cold Water species	Fresh water
Culture based fisheries	Fresh water
Shrimps	Sea water
Sturgeons	Fresh and sea water
Cage culture	Sea water
Tilapia	Brackish water
Ornamental Fish	Fresh and sea water



Current Aquaculture Capacities

Number of Farms	Areas / Hectare	Number of Stock Enhancement hatcheries	Number Of Cages	Number of Farmers
17300	616000	14	18	65200



Iranian Fisheries Organization Plan For 2025 Base on current trend

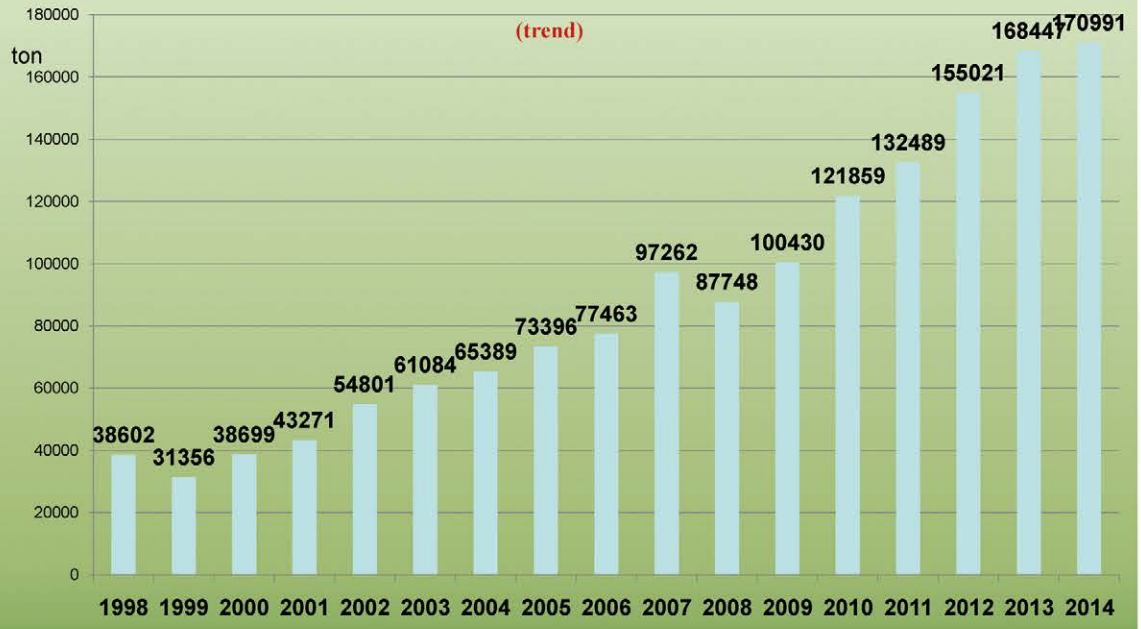
Iran fisheries Organization Main Targets

SUBJECTS	VALUE	TARGETS
Catch	**Tons**	905000
Aquaculture	**Tons**	974000
Total production	**Tons**	1879000
Per Capita	**Kg**	18
Import technology and equipment	**Million $**	9718
Fundamental Investigations	**Million $**	550
Bank Supports	**Million $**	4500
Total investments during 10 years	**Million $**	14768

Fresh Water Aquaculture

- Warm water : 14615farm /50000ha.
- Cold water: 1923farm/ 230ha.
- Culture based Fisheries (Warm and cold water) 412/ 562227ha.

Warm water Fishes Production



Warm water Aquaculture

Major species are:

- Silver Carp (*Hypophthalmichthys molitrix*)
- Common Carp (*Cyprinus carpio*)
- Bighead Carp (*Hypophthalmichthys nobilis)*
- Grass Carp (*Ctenopharyngodon idella*)
- Sturgeon (*Huso huso*)




New species for warm water culture:
Fresh water prawn (Macrobracum rosenbergii)
Caspian White fish (Rutilus rutilus friisi kutum)
Pike Perch (Stizostedion lucioperca)
Barbus (Barbus sharpeyi, Barbus xanthopterus)
Schizothorax (Schizothorax zarudnyi)
گروه آمار و اقتصاد صید


Indian carp
Catla (catla catla)
Roho (Labeo rohita)
Merigal (Cirrhinus merigala)



Barbus ماهی گطان
(*Xanthpterus*)



ماهی شیربت (*Barbus grypus*)



Barbus sharpeyi ماهی بنی



Tilapia

Mugil cephalus







Cold water Aquaculture

Major species are:

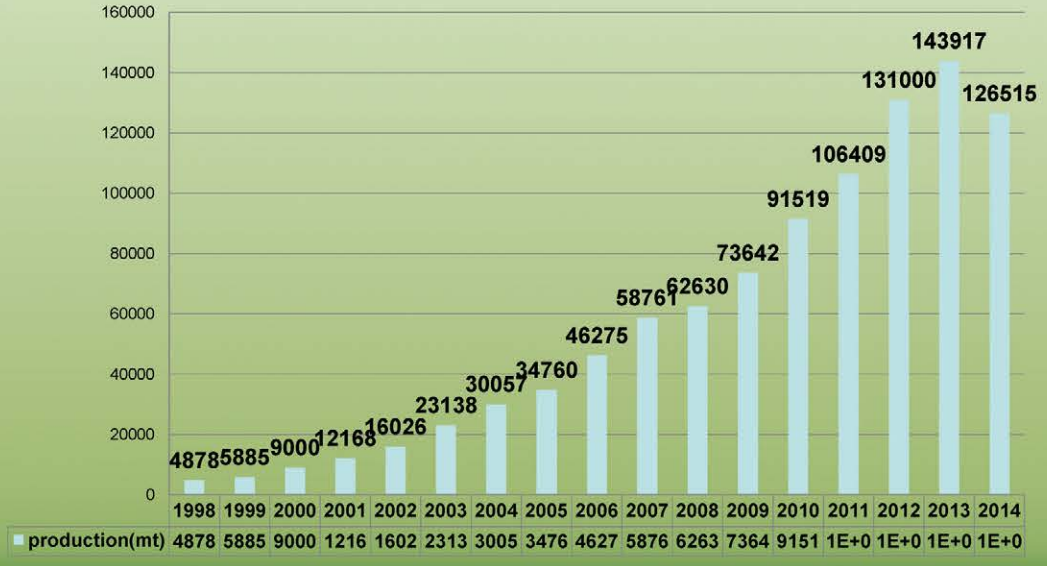
- Rainbow Trout (*Oncorhynchus mykiss*)

New species:

- Caspian salmon (*Salmo trutta caspius*)



Cold water Fishes Production (trend)



Caspian salmon *salmo trutta caspius*



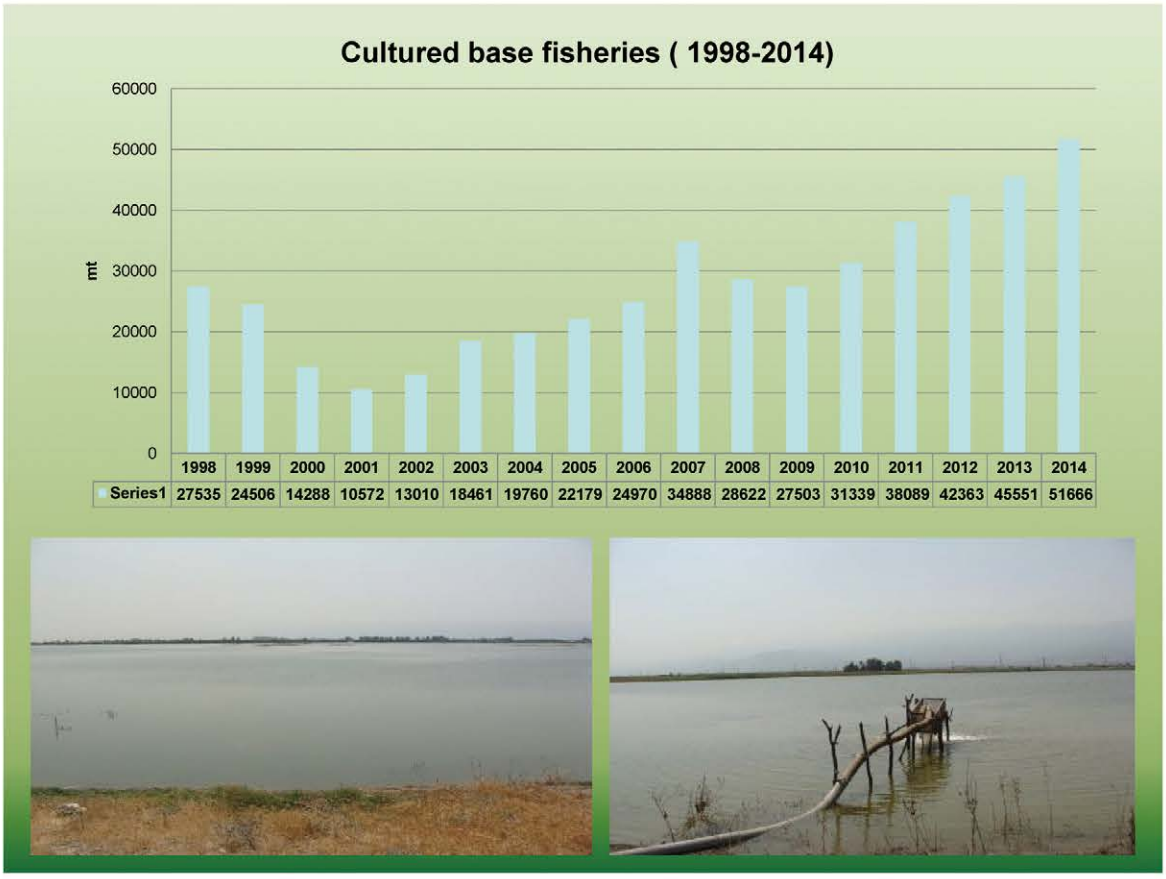


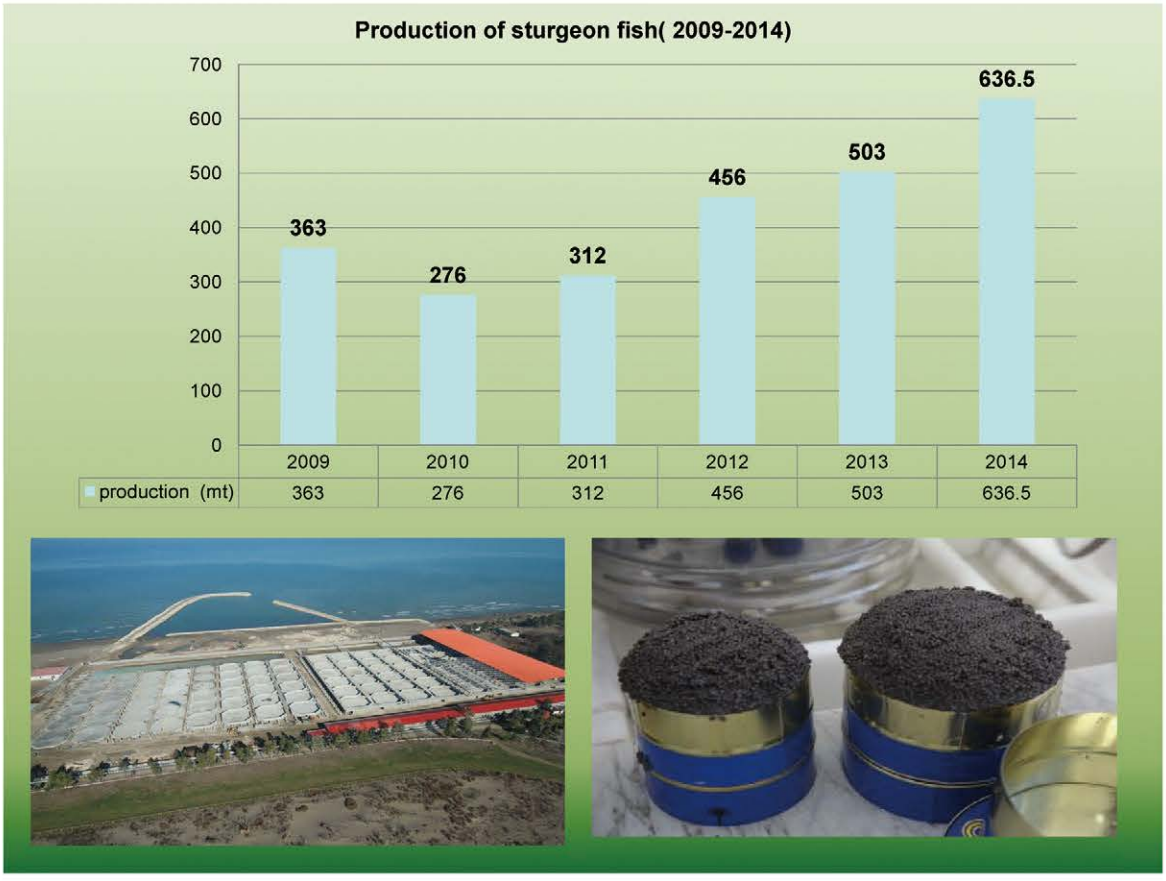


Astacus leptodactylus






Cultured base fisheries (1998-2014)
60000
50000
40000
30000
20000
10000
0
mt
1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014
Series1 27535 24506 14288 10572 13010 18461 19760 22179 24970 34888 28622 27503 31339 38089 42363 45551 51666


Production of sturgeon fish(2009-2014)
700
600
500
400
300
200
100
0
363
276
312
456
503
636.5
2009 2010 2011 2012 2013 2014
production (mt) 363 276 312 456 503 636.5

Successful Experience Aquaculture



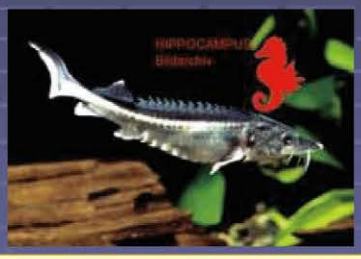
Different Sturgeon species In Iranian Shores of Caspian Sea



Acipenser persicus

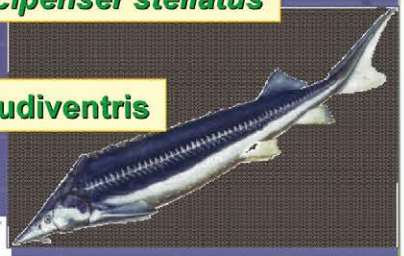


Acipenser stellatus



Acipenser gueldenstaedtii

Acipenser nudiventris



Huso huso





Stock enhancement

Sturgeon fish

There are six species of Sturgeon fish in Caspian sea and its leading rivers .

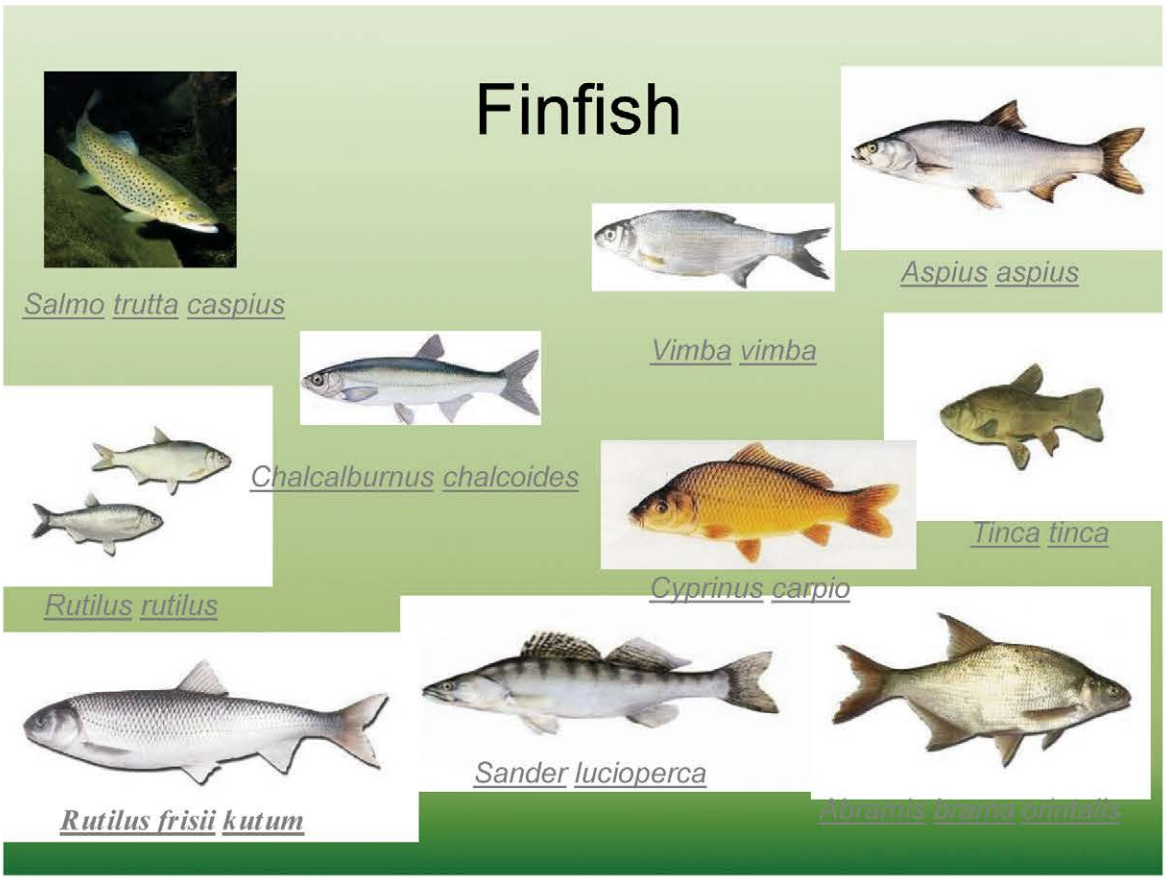
Bony Fish

Sustainable yield of some certain fishes definitely depends on restocking program

Marine Shrimp




مرکز بازسازی ذخایر
سیاهکل
مرکز ب
ماهی آ
مرکز خاویاری شهید
مرجانی
Mazandaran
Qazvin
Image NASA
© 2008 Europa Technologies


Finfish
Salmo trutta caspius
Aspius aspius
Vimba vimba
Chalcalburnus chalcoides
Tinca tinca
Cyprinus carpio
Rutilus rutilus
Sander lucioperca
Rutilus frisii kutum

Release of fish fingerlings to the Caspian Sea and Southern waters (million Pcs.) in 2014

• **Sturgeons**	**3.7**
• **Bony Fishes**	**290**
• **Marin fishes**	**0.5**
• **Shrimp PL**	**35**
• **Inland water**	**25**
• **Total**	**354.2**

Marine Aquaculture

Major species: •

White leg Shrimp (*Penaeus vannamei*)

Indian Shrimp (*Penaeus indicus*)

Minor species (in pilot scale): •

Seaweed

pearl oyster

Shrimp culture In Iran

1. **Shrimp culture in Iran has been starting since1991.**
2. **Primary Study has Indicated huge potential for shrimp culture in Iran(180,000ha).**
3. **Since 1992 about 45000 ha of coastal land in 4 provinces (south of Iran) and 1 province in the north of Iran (Golestan) .**
4. **About 12,300 ha of licenses area ready to operation, 10,000 ha under construction and 22,700 ha are under study.**
5. **Shrimp farming system in Iran is semi- intensive.**
6. **Main culture species in Iran is *Litopenaeus vannamei.***
7. **Shrimp hatchery: Total number of shrimp hatchery that are on operation are 27.**
8. **WSSV is the biggest problem of shrimp culture in Iran.**

Marine shrimp Aquaculture In 2014

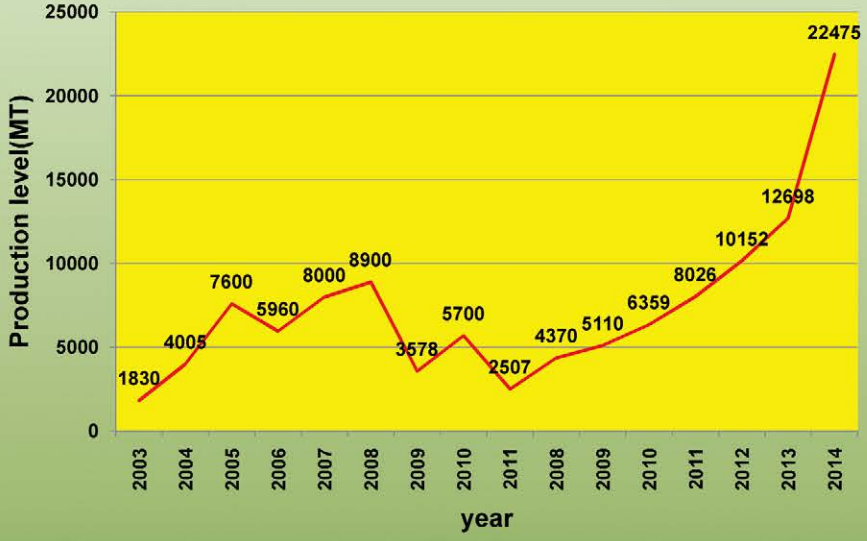
- Major species: White leg Shrimp (Lito*Penaeus* *vannamei*)
- Number of Shrimp hatcheries:27 unit
- Amount of Pls production:2billion pcs
- Shrimp culture: 518 farm/7053 ha.
- Amount of production:22475 tone
- Average production:3200Kg/ Ha



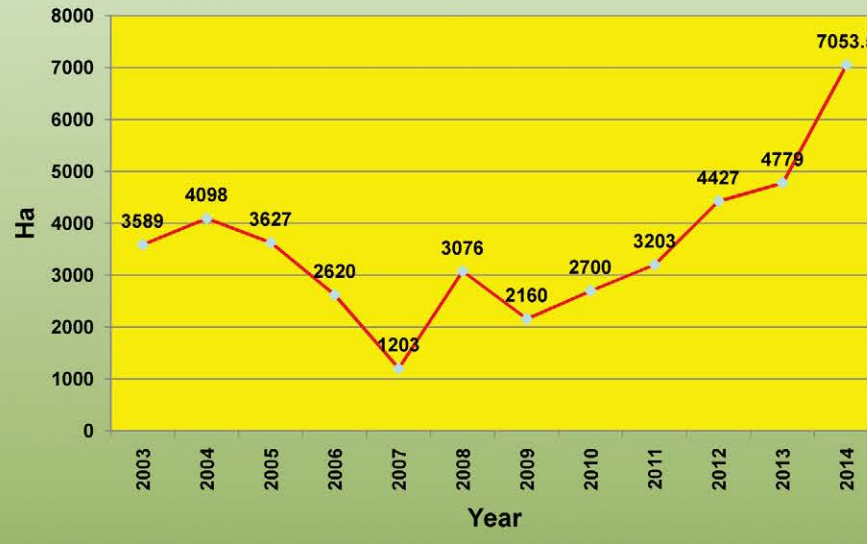
Specification of shrimp farming system in Iran

Parameter	Ranges
Pond size	0.75- 1.3 ha
Dike and bottom	Earthen
Water supply system	Gravity +Pump
Water drainage system	Gravity +Pump
Prouduction (MT/ha)	Up 2.5
Stocking density(Pl/m2)	22-25
Feed source	Supplement+ Natural
Seed source	Hatchery
Days of culture	120
Average body weight	Up 16
Poly culture	None
Aeration	Natural + aerator
Water Salinity (ppt)	37- 47
Survival rate	70%
No. of crop/year	Usually 1 ,some 2
Labor needs /ha	0.6
Disease problem	Yes

Trend of Marine shrimp Production during 2003-2014(MT)



Area of shrimp culture during 2003-2014 (Ha)



Estimated capacity for cage farming in Iran

province	Length of Coastline (KM)	
MAZANDARAN	350	200000
GILLAN	300	200000
GOLESTAN	300	40000
HOMOZGAN	1050	120000
BOSHEHR	500	30000
SISTAN& BALOCHESTAN	300	300000
KHOZESTAN	250	5000
TOTAL	3050	910000

Total of production marine cage culture (2014)

province	MAZANDARAN	GILLAN	HOMOZGAN	BOSHEHR	KHOZESTAN
species	Trout	Trout	Sobity Sea bream Asian sea bass	Asian sea bass	Sobity Sea bream Asian sea bass
Total of production (t)	190	5	527	5	4
Total of Country (t)	731				

Program of production in marine cage culture(2016-2020)

YEAR	2016	2017	2018	2019	2020
Total of production In program (T)	20000	50000	100000	150000	2000000

Marine Cage Culture in I.R.Iran



cage farming in Qeshm Island, Persian Gulf



Sea bass and Sea bream





Marine species for cage culture



Epinephelus coioides

هامور

شانك



Acantopagrus latus





Sparidentex hasta

صبيتي



سوكلا

Rachycentron canadum



Siganus spp

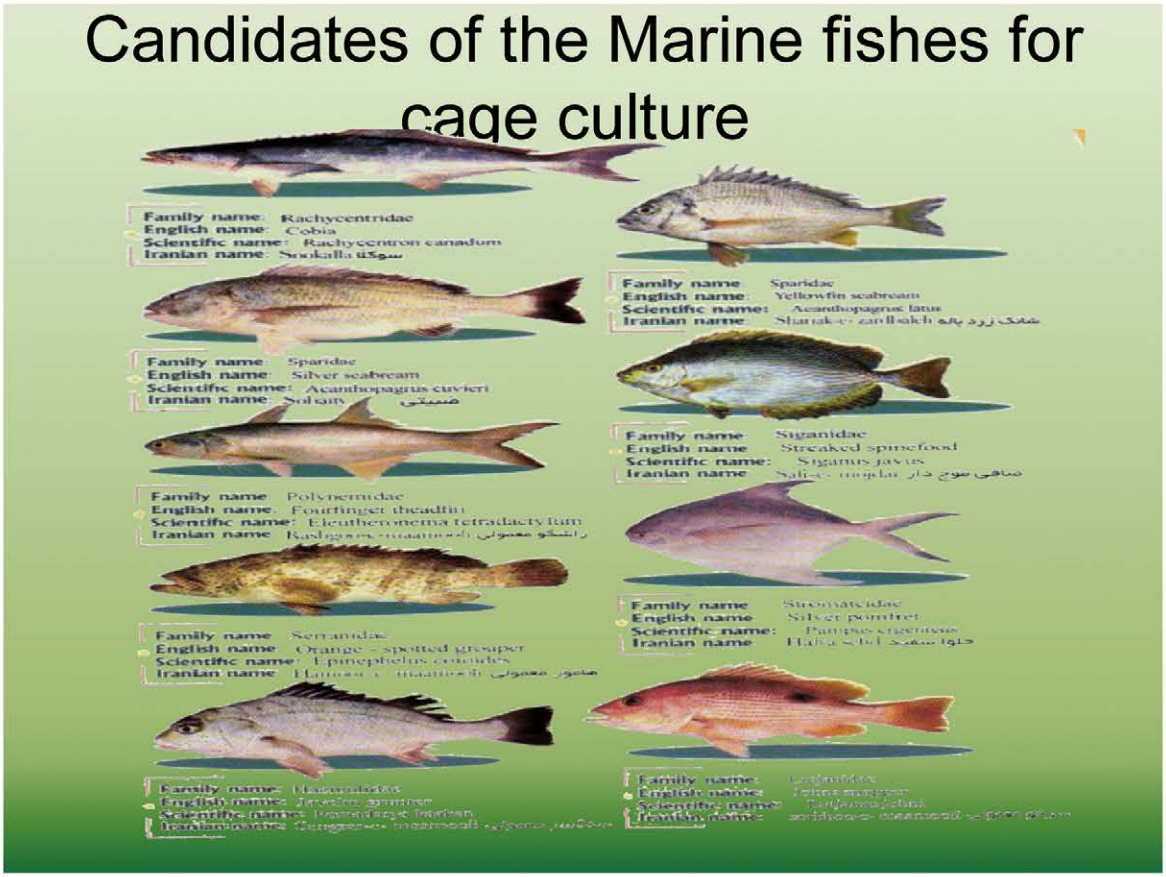
صافي ماهي



خامه ماهي

Chanus chanus

Candidates of the Marine fishes for cage culture



Cage farming in Caspian Sea



Rutilus frisii kutum



Cyprinus carpio



Salmo trutta caspius







Algae Culture in Iran

- Extensive of natural stocks of algae in Persian gulf &Oman sea.
- More than 300 species of seaweeds was identified.
- Identification of commercial algae species suitable for culture.
  - *Gracilaria*
  - *Gracilariopsis*
  - *Sargassum*
  - *Hypnea*

Gracilariopsis persica



Algae culture into the drainage canal of the shrimp complex before releasing to the sea



Farming system

- Individual farms
- Farms' complex
- Farming in paddy
- Farming in natural and semi natural reservoirs
- Farming in irrigation canals and tanks


Individual fish farm


Fish Culture in paddy



Fish culture using well water of agriculture irrigation



Fish culture in natural lake and reservoirs

Development plan for sixth program

subject	2014	2020
Warm water fish	170000	261450
Cold water fish	126515	212000
Culture based fisheries	51666	71600
Sturgeon	1000	5000
Shrimp	22475	60000
Cage culture	20000	200000
Other aquatic in marine water	0	610
Other aquatic in fresh water	263	340
Total aquaculture	390000	811000
Ornamental fish (million pieces)	200	281.1
Stock enhancement (million pieces)	400	500

Aquaculture in century 21

Globalization

Industrialization

Diversification

Increasing Value

Modernization

Food Safety

From fresh water to sea water

Expansion Policies in Aquaculture

- ❑ Growth in production per unit area
- ❑ Better use of water and land
- ❑ Improve in management of farms
- ❑ Introduction of new species

The way forward 1/3

- The responsible use of resources and the protection of the environment (licensing, EIA)
- Legislative framework simplified.
- There is a need to improve data collection for aquaculture products to support policy.

The way forward 2/3

- The consequences of global climate change and potential scenarios have to be assessed by Iranian stakeholders
- Modern, professional aquaculture sector is dependent on the availability of high quality services by foreign companies
- New aquaculture technologies provide opportunities for development

The way forward 3/3

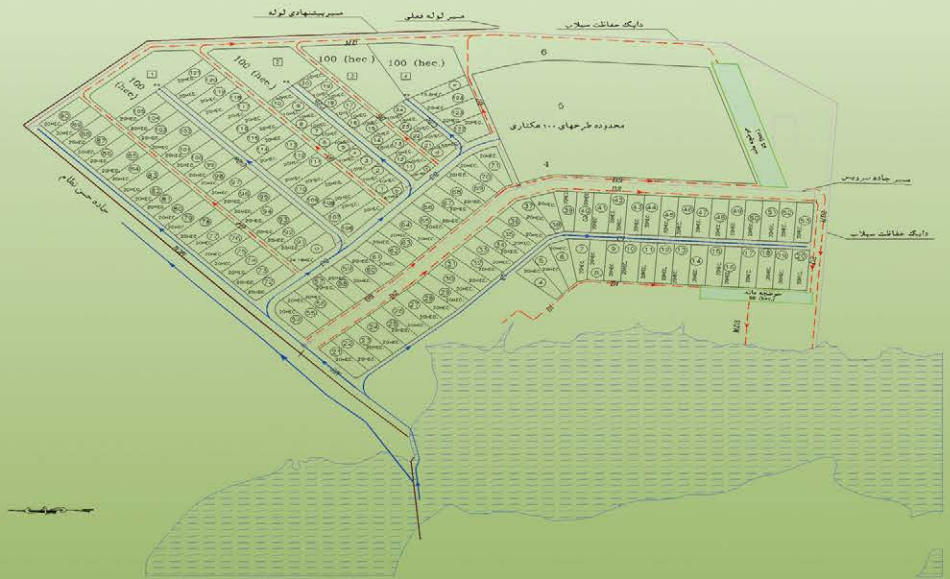
- Eliminating negative public perception of consumers and policy makers
- Development of an " ecolabel "can certify environmentally friendly aquaculture practices in Iran
- Better communication within the value chain and towards consumers
- Iranian aquaculture is an environmentally, economically and socially sustainable activity, based on scientific evidences





THANKS FOR YOUR ATTENTION

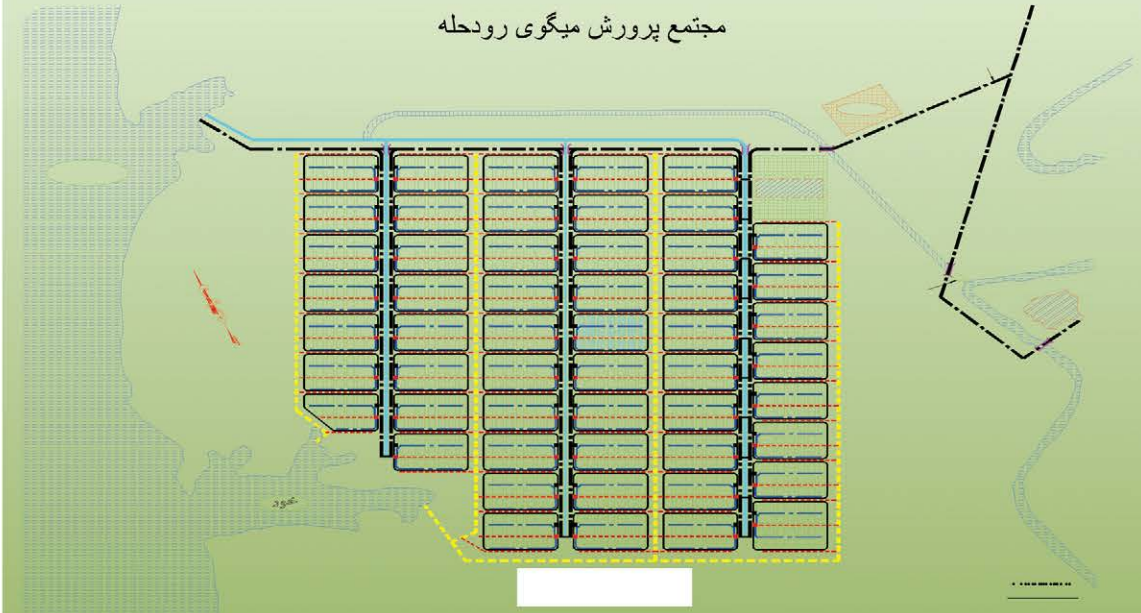
شیف



مجتمع پرورش میگوی بندرریگ



مجتمع پرورش میگوی رودحله



패널발표

이란국영선사

Panel Presentation

Islamic Republic of Iran Shipping Lines

-Ghasem Ghayour Zamhmatkesh
(Captain, Islamic Republic of Iran Shipping Lines)



Islamic Republic of Iran Shipping Lines

I R I S L

- A golden opportunity is Created for the world to enter the demanding "Iranian Market", in the aftermath of implementation of the Joint Comprehensive Plan Of Action (JCPOA)



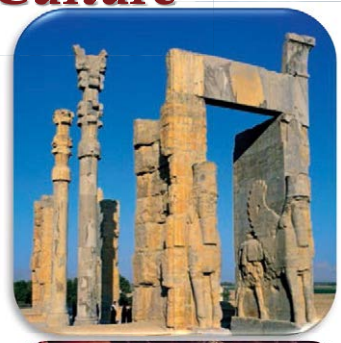
- For medium & long term investments in Iran, Oil, Gas and Transportation sectors are ready for international investors

Islamic Republic of Iran Shipping Lines

IRISL

Iran the Land of Historical Culture

- Iran is the land of history and culture, not only because of its Pasargad and Persepolis, Chogha Zanbil and Naqsh-e Jahan Square; indeed its millennial civilization and thousands historical and archeological monuments and sites demonstrate variety and value of religious and spiritual heritage, rituals, intact traditions of this country as a sign of authenticity and splendor.





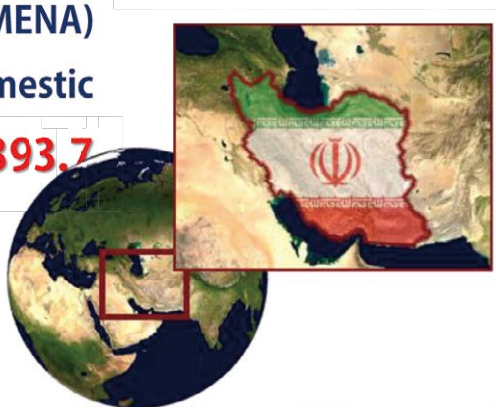


Source: Iranian Cultural Heritage, Handicrafts and Tourism Organization

Islamic Republic of Iran Shipping Lines

IRISL

- Iran is the second largest economy in the Middle East and North Africa (MENA) region, with an estimated Gross Domestic Product (GDP) in 2015 of **US$ 393.7 billion**.
- Iran has the second largest population of the region, with an estimated **78.8 million** people in 2015.



- Following to implementation of JCPOA and lifting of the sanctions and a more business-oriented environment, real GDP growth is projected to reach **4.2 percent** and **4.6 percent** in 2016 and 2017, respectively.

Source: World Bank Group

Islamic Republic of Iran Shipping Lines

IRISL

Iran Gas & Oil

Gas 1/5 Proven Global Gas Reserves

1st World largest gas reserves Over 1200 trillion cubiuc feet

Proven Reserves of Natural Gas 2015 (Trillion Cubic Feet)

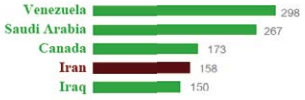


Gas Production 2014 (Billion Cubic Meter) 173

Oil

4th World's 4th largest oil reserves 158 billion barrels

Crude Oil Proven Reserves 2015 (Billion Barrels)



Oil Production 2014 (Thousand Barrels Per Day) 3,614

Financial Times:
... Since January 2016, Iran could increase its oil export reaching to a 2 million barrel per day and is looking to absorb as much as 200 billion USD foreign investment in 5 year to increase production.

And Hence the justification for reliable and profitable long term investment on Oil and Gas industry of Iran for European investors

Islamic Republic of Iran Shipping Lines

IRISL

Silk Roads

- **Eurasia was criss-crossed with communication routes and paths of trade, which gradually linked up to form what are known today as the Silk Roads;**



Islamic Republic of Iran Shipping Lines

IRISL

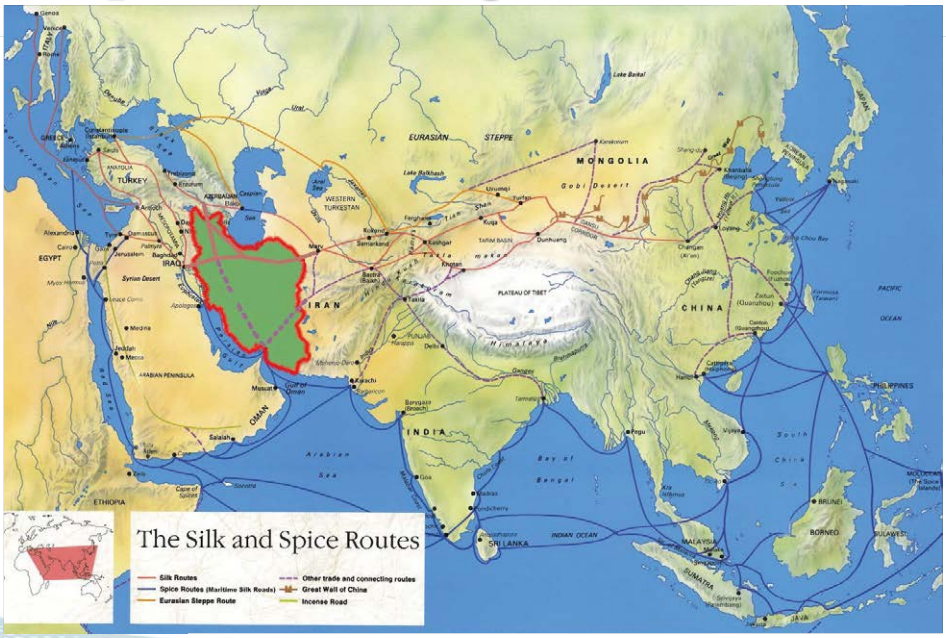
Conspicuous Strategic Position of Iran

- Since the 2nd century BC, Iran has been at the heart of the Silk Road, facilitating trade and acting as a hub for the exchange of ideas and knowledge between the East and the West.
- The economics that governed trade for 2 millennia are still applicable today; at the cross roads of the East and the West and straddling the Persian Gulf and the Caspian Sea, Iran can be as a natural hub for the production of goods and services to serve a vast regional market.

Islamic Republic of Iran Shipping Lines

IRISL

Conspicuous Strategic Position of Iran



Source: UNESCO

Islamic Republic of Iran Shipping Lines

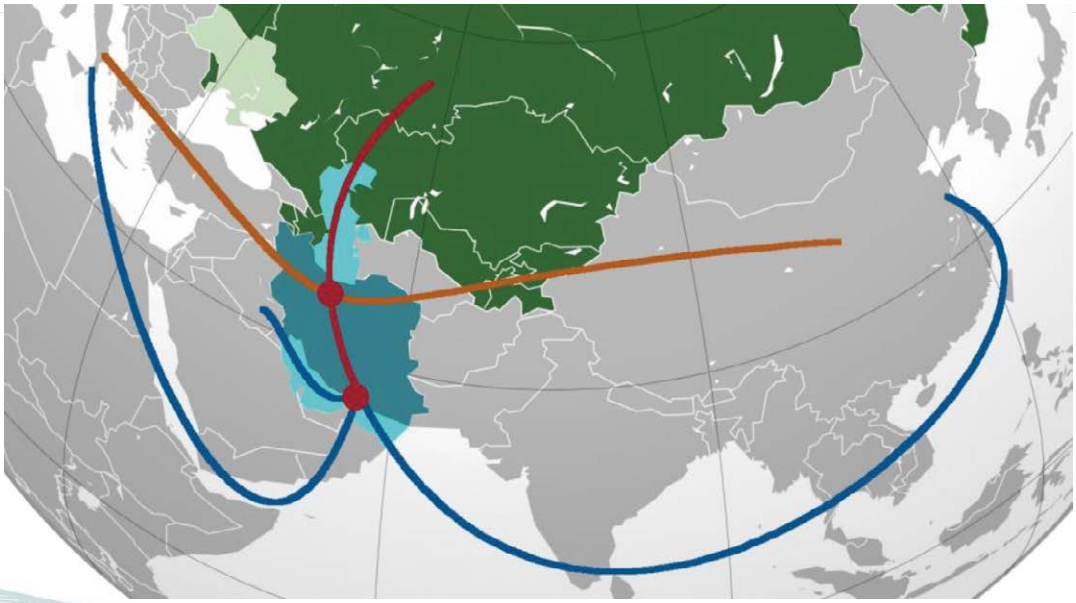
IRISL

Considering low freight rate in sea passage sector of east west corridor, a multimodal transportation, consisting of carriage of consignments from far east by sea and road transportation to CIS countries, fosters a high level of efficiency and economy .

Islamic Republic of Iran Shipping Lines

IRISL

Iran Connect CIS Countries to East and West



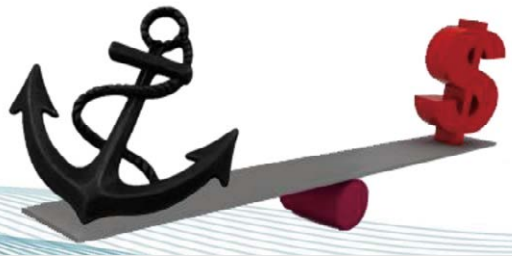
Islamic Republic of Iran Shipping Lines

IRISL

IRISL GROUP

Stock Listed

Market Value:	~ 3.1 Billion USD
Book Capital Value:	~ 544 Million USD



Islamic Republic of Iran Shipping Lines

IRISL

Range of Activities

01 Container Liner
02 Bulk (Dry & Wet)& General Cargo
03 Bunkering
04 Shipping Services in Caspian Sea
05 Agency Services
06 Ship Management
07 Cargo and Passengers in Persian Gulf and Oman Sea
08 Offshore Services
09 Manning & Recruiting

Islamic Republic of Iran Shipping Lines

IRISL

Range of Activities

10 Maritime Education & Training
11 Port & Terminal Operations
12 Multi-Modal Transportation
13 Commodity Trading
14 Stores and Spares
15 Dry docking and voyage repairs
16 Finance and Investment Services
17 Trade & Carriage of Bitumen
18 Maritime Insurance
19 Maritime Information Technology

Islamic Republic of Iran Shipping Lines

IRISL

IRISL Fleet

Largest Shipping Company in the Region

No. of Fleet	1000 DWT	1000 TEU
155	5,169	122



Various Fleet

- Container
- Bulk
- General Cargo
- Tanker
- Off-Shore
- RoRo
- ...

2015

Cargo Loaded
(Million Ton)

32

Islamic Republic of Iran Shipping Lines

IRISL

Container Ranking of IRISL

(May 2016)





Rank	Company
⋮	⋮
19	Zim
20	IRISL
21	Arkas

Source: Clarksons Research

Islamic Republic of Iran Shipping Lines

IRISL

Khazar Sea Shipping Line

(The Largest Shipping Company in The Caspian Sea)

Type	No. of Fleet	1000 DWT	1000 TEU
Multipurpose	23	93	3

2015

Cargo Loaded
(Million Ton)

2

Share of 34%
Of import and Export
In Iran's northern ports





Islamic Republic of Iran Shipping Lines

IRISL

Tourism

IRISL Invites Investors to Establish Passenger Shipping Line to Cover Middle East-Europe Sea Ports

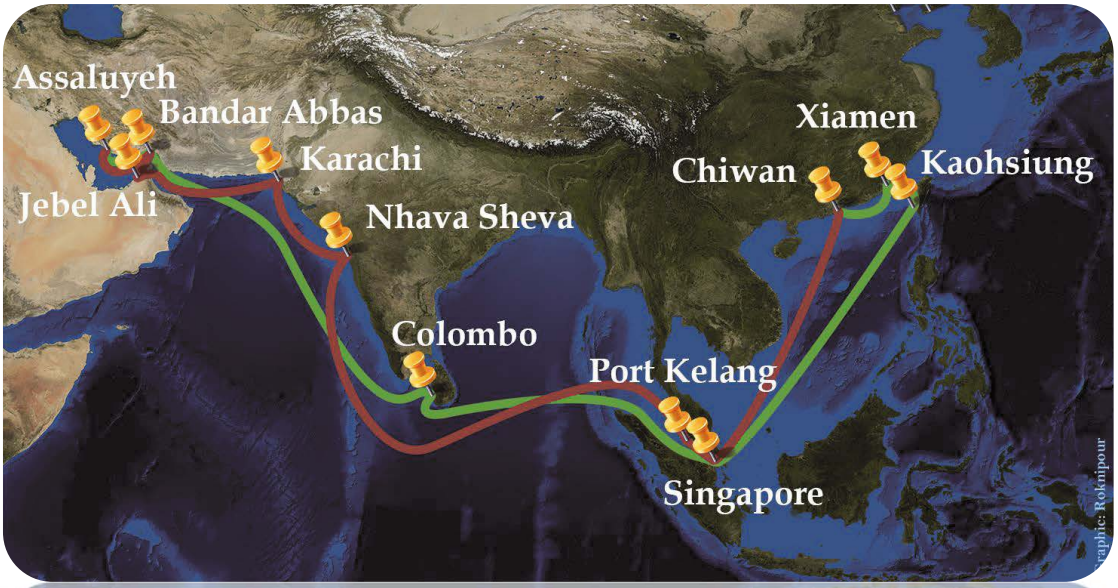
VALFAJR SHIPPING CO.



Islamic Republic of Iran Shipping Lines

IRISL

Promotion of Current Container Liner Service: Persian Gulf – Far East



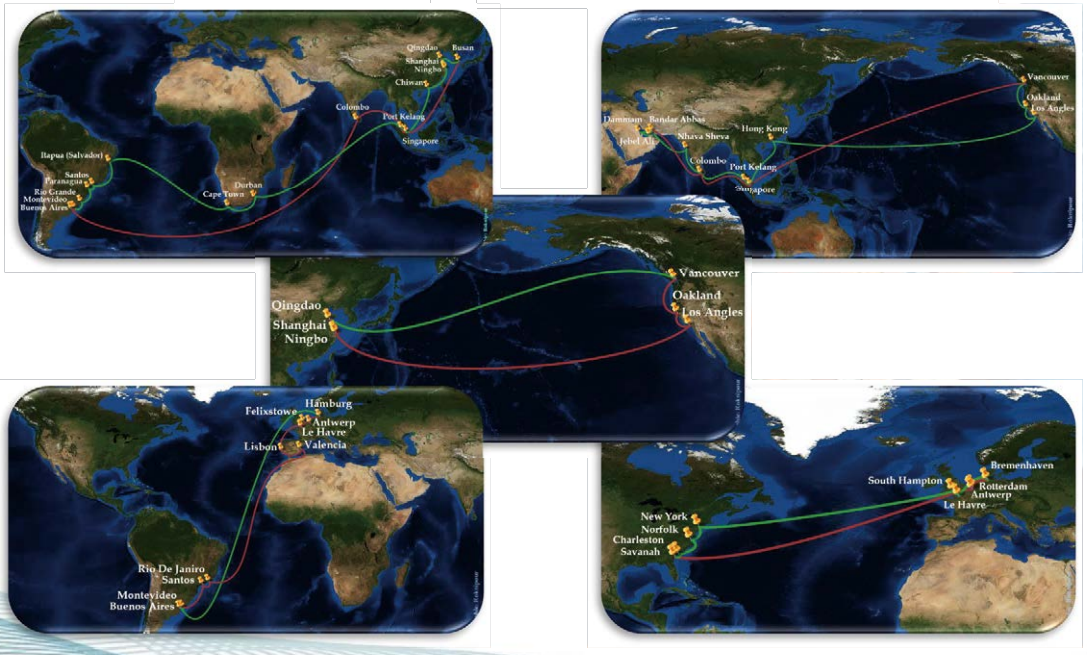

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IRISL
Resumption of Container Liner Service: Persian Gulf – Europe
Hamburg
Felixstowe
Antwerp
Genoa
Valencia
Malta
Assaluyeh
Bandar Abbas
Jeddah
Jebel Ali
Nhava Sheva

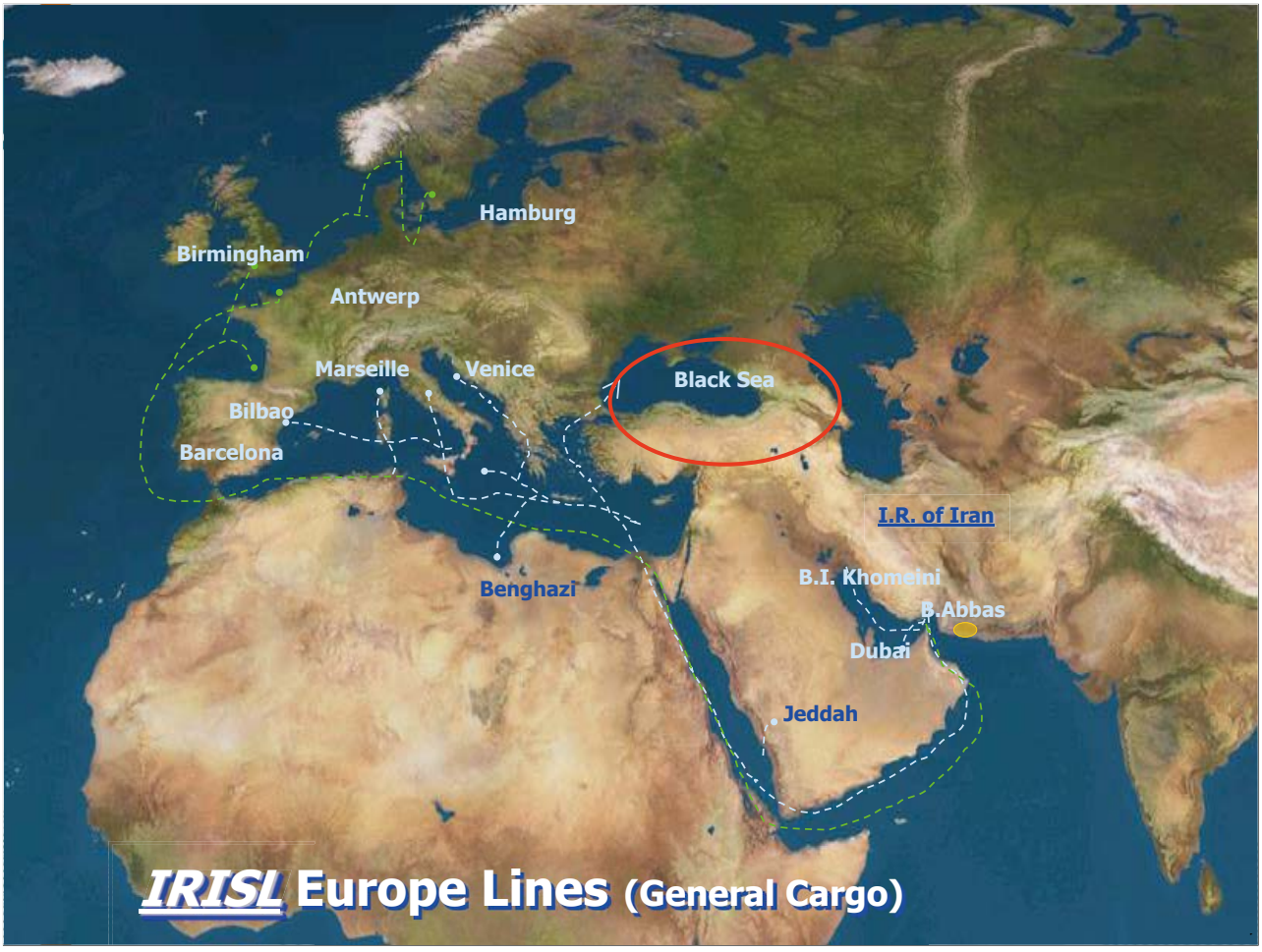

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IRISL
Promotion of Current Container Liner Service: Persian Gulf – Africa
Bandar Abbas
Karachi
Mundra
Jebel Ali
Nhava Sheva
Mombasa
Dar es Salaam

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Introduction of Container Liner Service





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IRISL shipping lines revival

- Europe and Mediterranean Area
  - Employment of 6 Container Vessels and 7th will be under way
  - Employment of 6 Bulk Carrier and 7th will be under way
  - Employment of One General Cargo Vessel and 2th will be under way
- South America Area
  - Employment of 4 Bulk Carrier and 7 Others will be under way
- South Korea
  - Employment of One General Cargo Vessel and 2th will be under way



Islamic Republic of Iran Shipping Lines

IRISL

IRISL shipping lines

With Focus on:

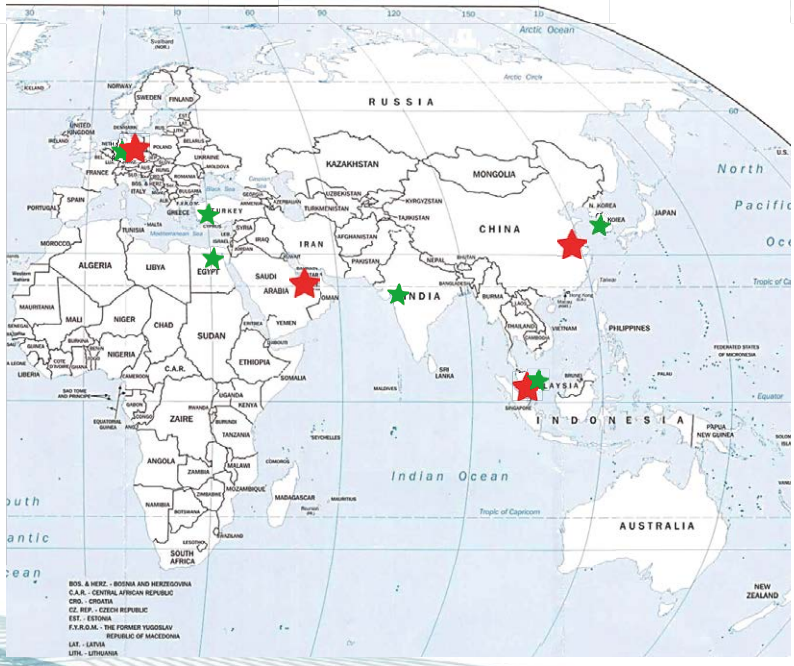
- Export
  - Petrochemical
  - Oil Products
  - Other Exports
- Import
  - Project Cargo
  - Container and Break Bulk Cargo



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Revival and Expansion of Agency Network



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Fleet Expansion by 2020

Container



2015: 120,000 TEU

2020: 670,000 TEU

Containerships



2015: 240,000 TEU

2020: ~1,4 m. TEU

Container Box

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Fleet Expansion by 2020



2015

2.5 m. DWT

2020

4.5 m. DWT

Dry Bulk

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Fleet Expansion by 2020



2015

1.11 m.DWT

2020

2.7 m.DWT

Tanker

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IRISL

Tank Farms & Bunker Hub (Qeshm Island)

Value	~ 67 Million USD
Area	51 Hectares

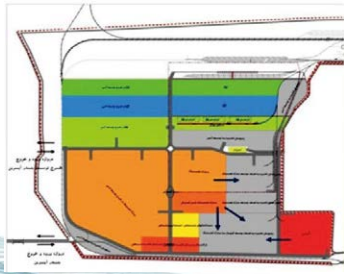


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Dry Ports (Aprin)

Value	~560 Million USD
IRR	15%-17%
Construction period	3 years
Period of operation	25 years
Area	400 Hectares





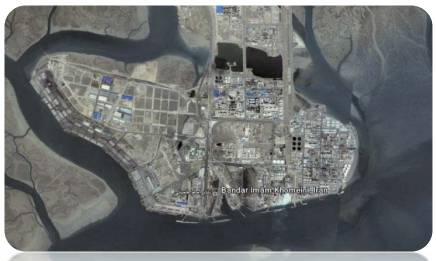
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IRISL

Terminal acquisition/ operation

Container Terminals	Value
Bandar Imam Khomeini Port	~ 60 Million USD
Terminal 2-Shahid Rajaei Port	~ 250 Million USD
Terminal 3-Shahid Rajaei Port	~ 600 Million USD







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Shipbuilding/ Repair Yard

Phase	Value
1	67 Million USD
2	200 Million USD
Total	267 Million USD





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IRISL Investment Company

- active in Iranian Capital Market
- ready for
  - ✓asset management services
  - ✓supporting "Investment Banking"
  - ✓Joint Ventures in Iran
  - ✓collaborating in "Mutual Funds"
  - ✓providing advice on Iranian Capital Market
  - ✓insurance & reinsurance
  - ✓passenger shipping lines to Europe

Islamic Republic of Iran Shipping Lines

IRISL

CHOOSE IRISL AS YOUR TRUSTED PARTNER

- IRISL welcomes partnerships and investments in a wide range of maritime activities & projects





- Insurance is a major part of the shipping industry and IRISL is ready for insurance and reinsurance cooperation

IRISL

Thanks for Your Kind Attention

June 2016