



Tripoli Special Economic Zone: Business Advocacy Approach: The Fundamental Support of the National Business Community

Roger Melki

www.kas.de



Business Advocacy Approach

- The Business Advocacy Approach is an informal action led by the national business organizations, with the primary goal to join forces in order to support a specific regional development project or a particular sector of activity and to contribute to its effective implementation
- The set-up team is mainly formed of Chambers of Commerce and Industry, business and professional associations and other NGOs business support.
- The Tripoli Special Economic Zone needs such an action to enhance its chances of success
- Mobilizing the business community to support this project is not only intended to ensure the success of this zone of activity, but also to help expanding investment opportunities for all domestic firms and improving the business climate in the country



Economic

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18.12.2017

Content of the Document

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- > Towards a stimulating platform: Turning adversities into opportunities
- > Achieving a successful development approach
- Positive reverse context effect

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- Vibrant economic concept
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Part 1: Background and Outlook: New Economic and Development Opportunities for Tripoli and Lebanon



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> Towards a stimulating development project: Turning adversities into opportunities.

- > Achieving a global successful integrated approach.
- Positive reverse context effect.

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Background and Outlook: Towards a stimulating development project: Turning adversities into opportunities

- Prior to the 70s, the city of Tripoli and Northern Lebanon region was a key economic hub.
- In the last 4 decades, Tripoli suffered heavily from political instability, poor economic relations and interactions with the rest of the Lebanese regions, along with insufficient infrastructure projects and weak business environment
- To address this economic and social hindrance at breakneck speed, the Lebanese government took in 2008 the decision to implement TSEZ, the role of which was to speed up economic development in this region and create jobs to reduce poverty
- The establishment of the TSEZ was judged as an inventive way for attracting local and foreign **Tripoli Special Economic Zone** investments, with the aim of developing business activities, creating jobs and generating exports
- Local political and economic communities immediately embraced the project and international donors lined up to pledge support for this initiative



Background and Outlook: Achieving a Global Successful Business Approach

- The main objective of the TSEZ project is to reinforce local economic activities in Tripoli and its large vicinities, as well as highlighting the benefits that this unique experience may offer to many Lebanese operators across the country, the Lebanese Diaspora and foreign entrepreneurs, including:
 - Opportunities for direct investment in the area
 - ✓ The opportunity to participate in TSEZ infrastructure investments
 - The possibility to offer products and services to operators established within the TSEZ
 - The possibility to extend the advantages offered in the TSEZ to improve the overall
 business environment in Lebanon





Background & Outlook: Positive Reverse Context Effect

- In 2014, the Lebanese army took the full control over Tripoli and restored security in all of its areas, allowing a significant improvement of the investment climate including:
 - A substantial regain of activity in the city & in many of its productive sectors
 - ✓ The revival of the TSEZ project & the nomination of its first Board Authority
 - The acceleration of infrastructure works related to the TSEZ area
 - The election of a new board of the Tripoli Chamber of Commerce, Industry and Agriculture (CCAT)
 - The completion of the extension & modernization works of the port
 - The emergence of business, think tanks and professional organizations in the city
 - ✓ Some large Lebanese and foreign companies resumed activity in the city
 - Promising Future: The City of Tripoli and its vicinities are becoming again one of the most vibrant business area in the country

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Background & Outlook: Paper Outline

- The document will present a brief overview of the TSEZ concept, the different stages of the implementation process, the basic lessons that Lebanon could learn from the project, along with key elements considered as success factors, including the support of the global Lebanese business community
- The paper structure will include:
 - Section 1: Assessment of the political, social and economic contexts that have pushed to create the TSEZ
 - Section 2: The main features and characteristics of the TSEZ concept
 - Section 3: The steps undertaken and main achievements
 - Section 4: TSEZ as a role model and its national dimension: Business community support: Methodology and Action Plan suggested to involve the business community 18.12.2017
 - Section 5: Conclusion and main recommendations



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Part 2: Attractiveness of the TSEZ: A Vision Based on Performance and Efficient Values





- Dynamic development platform
- Vibrant economic concept
- Prime geographic location
- A streamlined modus operandi
- Risks and challenges

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Attractiveness of the TSEZ: Dynamic Development Platform

- The establishment of the Tripoli Special Economic Zone was considered as a major development platform to attract local and foreign investments aiming to develop business activities, create jobs and generate exports, particularly:
 - Generating additional economic activity
 - Promoting domestic and foreign investments
 - Creation of employment opportunities
 - Promoting exports of goods and services
 - Developing infrastructure facilities
 - Single window clearance for setting up projects in the TSEZ
 - Implementing a good practices system
 - ✓ Introducing new business practices, including Public-Private Partnership (PPP) projects





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Attractiveness of the TSEZ : A Vibrant Economic Concept Based on 4 Pillars

- Business development: Initiation of additional industrial and services activities
 - Development of new projects: local and national: Greenfield investments
 - Extension and relocation of existent business operations
 - Attract diaspora engagement and interest in the area
 - Attract regional and international foreign investment
- Export-led growth: Facilities and advantages
 - Prime location
 - Transport facilities
 - Fiscal advantages





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Attractiveness of the TSEZ : A Vibrant Economic Concept Based on 4 Pillars





- Employment prospects
 - Direct employment
 - Indirect employment
 - Employment accommodations
- Business environment improvement: TSEZ as a pilot project to reform business processes and procedures in Lebanon
 - ✓ TSEZ authority acts as facilitator in issuing licenses, permits & work documents
 - Basic models for a one-stop shop model: Simplification of procedures for starting and conducting business and ease the development of operations
 - Introduce new business practices including PPP projects

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Attractiveness of the TSEZ : A Prime Geographic Location

- > Transportation connections and linkages are key to the future success of the TSEZ
- The TSEZ is well positioned thereof being adjacent to the Port of Tripoli, 22 km from the Syrian border, 2 km from the center of Tripoli, 70 km from Beirut and 80 km from Rafic Hariri International Airport in Beirut
- The proposed 55 hectares-land is flat and has been reclaimed with minimal funding / capital investment by the government

The TSEZ has access to transport infrastructure and off-site utilities, and is considered as an attractive location for exporters with direct access to the Port of Tripoli and to a ^{18.12.2017} railway facilities planed since more than 12 years to link the city to Syria and regional ¹³

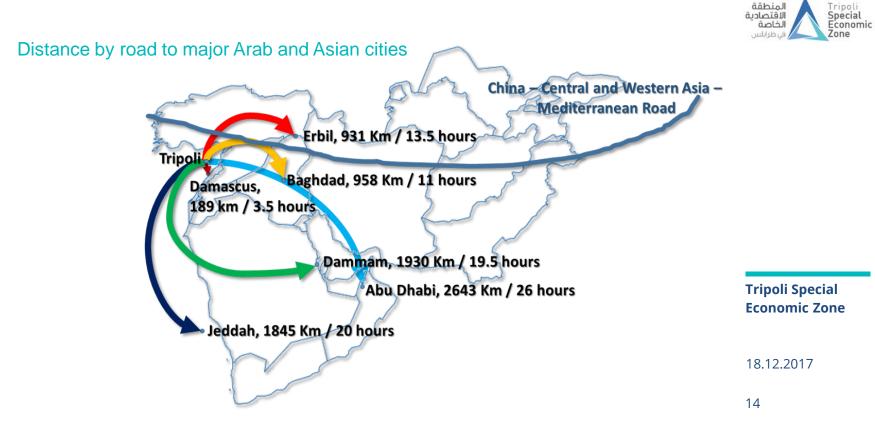
countries



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Attractiveness of the TSEZ : A Prime Geographic Location





Attractiveness of the TSEZ : A Prime Geographic Location















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Master Plan : Key Facts





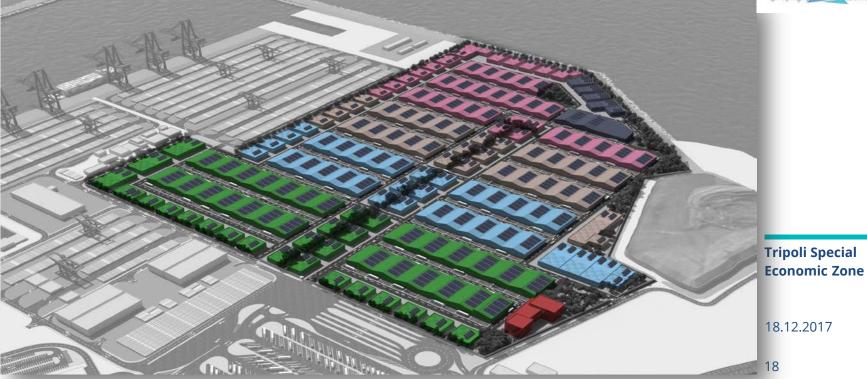
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An Efficient Master Plan Concept







Attractiveness of the TSEZ: A Streamlined Modus Operandi

1. Legal and Regulation Context:

- Unique design of key administrative, legal, taxation, and regulatory framework
- Single window clearance on matters related to national or local construction licensing and authorizations
- Licenses for industrial and operational authorizations are issued by TSEZ board, with large autonomy vis-à-vis the other public sector institutions
- > Lifting any restrictions on foreign ownership as well as on capital and dividend repatriation
- Simplification of work permit procedures for foreigners, who could account up to 50% of the total hires
- Exempt foreign workers from the work permit fees
- > Flexible organizational and management model







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Attractiveness of the TSEZ: A Streamlined Modus Operandi



2: A Dynamic Management organization and a Modern Master Plan

- Customs and Administration/Support Services on-site and a unified access to the Port of Tripoli
- Varied plot sizes along with pre-built constructed units for lease to attract different sizes of companies including small and medium enterprises (SMEs), workshops, and start-ups
- Multiple form of implementation: Renting, leasing, constructed spaces, land free ...
- Secured site [Closed-Circuit Television (CCTV) monitoring] with independent entrance
- Mandatory greening and environmentally friendly design
- On-site power to ensure 24/7 access to all TSEZ tenants
- Quality infrastructure for the site and the industrial uses
- Vibrant promotional and marketing strategy
- Optimization of infrastructure costs and investment through phasing



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Attractiveness of the TSEZ: A Streamlined Modus operandi

3: Tax incentives:

- 100% exemption on building permit fees and built property tax
- 100% customs exemption on imported raw material
- Duty free export of finished goods
- Duty free import of construction material, equipment and office machinery
- 100% exemption on VAT and excise tax for goods and services destined for exports
- 100% exemption on corporate profit tax (provided that not less than 50% of the workforce is **Tripoli Special Economic Zone** Lebanese and the value of fixed assets or capital is greater than USD 300,000)
- 100% exemption on withheld tax on salaries for employees of tenants and on social security 18.12.2017 contributions
- 100% exemptions on shares and bonds issued by companies within TSEZ





Attractiveness of the TSEZ: A Streamlined Modus operandi

4: Local advantages and Prospects

- The northern Lebanon region in general and Tripoli in particular, offer a rich potential for investments drivers, including:
 - Availability of large land spaces and industrial area for the TSEZ
 - Low operational costs when compared to other Lebanese regions
 - ✓ Facilities of the Port of Tripoli
 - Availability of human resources
 - Availability of universities and education institutions
 - ✓ Low living cost when compared to other regions, especially towns and villages in central Lebanon
 - ✓ Business booms in Tripoli after a long period of cautiousness and recession
 - ✓ The return of large companies, mainly in import, transport and logistics fields





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What are the potential sectors to be attracted by the TSEZ?





The preliminary feasibility study showed that many sectors could be attracted to invest in the TSEZ area. The below lists were established based on different and multiple criteria, including: Previous studies related to national development strategies and priority sectors, direct field researches, identification of sectors which show greatest compatibility and propensity for growth, availability of skills and competencies and the readiness of the business community to invest in Tripoli and the northern region of the country.

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What are the potential sectors to be attracted by the TSEZ?



Small and Medium sized industries with high added value and export potential

- Apparel and clothing
- Food processing
- Chemicals and Plastics
- Paper products
- Construction material
- Upstream and downstream oil and gas
- Metal fabrication
- > Furniture
- Electronics

Services and other uses

- Logistics and warehousing
- Marine based services (maintenance and reparation)
- Trade and Service companies (management and regional offices)
- Vehicle repair
- Potential international construction companies involved in Syria reconstruction

Thema der Präsentation in drei Zeilen

09.06.2018

Who would be the first potential tenants of the TSEZ?

- The attractiveness of the TSEZ for potential investors will be pending on the different phases of the project, and the effective practices with regard to the different regulations pledged by the Lebanese authorities
- The first arrivals are likely to be entrepreneurs from Tripoli and northern Lebanon. They will be followed by investors from the other Lebanese regions and the Lebanese Diaspora

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Who would be the first potential tenants of the TSEZ?

- > The origin of potential investors in the TSEZ can be classified as follows:
 - From Tripoli and northern Lebanon
 - ✓ From other Lebanese regions
 - ✓ From Lebanese Diaspora
 - From close neighboring countries (Syria, Jordan, Iraq and Turkey)
 - ✓ From Gulf countries: Funds and companies
 - ✓ From international companies as platform for their regional activities





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What are the TSEZ Potential Investment Forms?



- The major expected investment forms in TSEZ are greenfield investments (a total new investments), since the area is currently devoid of any activity. These forms include:
 - \checkmark Start ups or expansion of existing businesses, attracted by the availability of industrial land, the regulation advantages, the tax incentives and the prime location
 - Relocation of Lebanese entrepreneurs from other Lebanese regions or from Gulf countries due to decrease in business opportunities, or to modernize the production capacity and take advantage of the opportunities and advantages offered by the new **Tripoli Special Economic Zone** zone
 - Creation of a subsidiary or a branch to benefit from the TSEZ advantages, or to 18.12.2017 serve a new market in northern Lebanon, or for export facilities

Risks and Uncertainties: Challenging Perspective

- 1: Site environmental nuisances
- > The TSEZ is located in close proximity to a number of industrial pollutant projects:
 - An existing solid waste sorting plant
 - An existing slaughterhouse
 - Tripoli's sewage pipeline and waste-water treatment plant
 - A potentially new composting plant
 - An old Oil jetty pipeline

These types of activities reduce the TSEZ's attractiveness for large number of industries, mainly in the agro-food field

The TSEZ project is proposing short and medium term solutions and programs to alleviate these environmental constraints



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Risks and Uncertainties: Challenging Perspective

2: National economic and business environment weaknesses

- Like in other sectors and in the different Lebanese regions, business activities in the TSEZ are facing a multiple political, economic and social constraints, along with countless complications that face conducting business in the country. These include:
 - An unstable internal and regional political and security context
 - A poor economic growth path for the last 7 years with meagre projections for the short and medium terms
 - A drop of the investment rate since 2011, despite supportive programs mainly through subsidized loans developed by the ministry of Finance & the Central bank.
 - Availability of human resources
 - A poor management of the public finance, generating unsustainable deficits and alarming public debt
 - Large deficit in the trade balance and large deficit in the balance of payment
 - Weak appetite to invest in Tripoli and its vicinities, and the poor image of the city as attractive region for investment





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Risks and Uncertainties: Challenging Perspective

3: Inadequate and insufficient local economic and social background

- The TSEZ development may face some difficulties owing to the weak economic structures of Tripoli and its surrounding and lack of resources particularly:
 - Low and depleted economic and social structures reducing the backward and forward impact of the TSEZ's implemented activities. Suppliers are selected out of Tripoli and the redistribution effects are grasped by the other Lebanese regions, particularly Beirut and its vicinities
 - The persistence of the city's bad image, especially in what pertains to the additional investments risks that developers, operators and tenants might face in Tripoli
 - ✓ Lack of adequate human resources in Tripoli
 - Meager availability of loans and investment funds in Tripoli and banks' low appetite to lend in this area
 - Reluctance of executives and senior technicians to relocated in Tripoli





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Part 3 : Execution and Achievements





Undertaken steps

> Next steps

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Execution and Roadmap (1)





	2008-	2015	2016	20	2017		2018		2019)20
	2014			Sem 1	Sem 2	Sem 1	Sem 2	2 Sem 1	Sem 2	Sem 1	Sem 2
Legal and Regulation											
Approval of the establishment law of the TSEZ											
Approval of its main implementation decrees											
Nomination of the project executive authority											
Decree published to develop a Knowledge and Innovation Space at the Rachid Karami Fair site											
Licensing regime and one stop shop regulation											

Action Plan

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Execution and Roadmap (2)





Action Plan : Project Concept

	2008-	2015	2016	2017		2018		2019		2020	
	2014	2013	2010	Sem 1	Sem 2	2 Sem 1	Sem	2 Sem 1	Sem 2	2 Sem 1	Sem 2
Preparation of the basic master plan											
Execution of the feasibility study and updating											
Agreement signed with World Bank for a technical support											
Design of the knowledge and innovation space at the Rachid Karami Fair site											

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Execution and Roadmap (3)





Action Plan : Infrastructure Patterns

	2008- 2014	2015	2016	2017		2018		2019		2020	
				Sem 1	Sem 2						
Finalize the landfilling infrastructures											
Set plans and phase agenda for the infrastructure program and master plan											
Establish the different phases of the execution plan											
Execution of the first phase											
Execution of the first phase of the Knowledge and Innovation Space at the Rachid Karami Fair site											

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Execution and Roadmap (4)





Action Plan : TSEZ Management

	2008- 2015		2016	20	17	2018		2019		2020	
	2014			Sem 1	Sem 2						
Setting of the TSEZ Authority											
Facilitate and authorize employment within the TSEZ											
management structure											

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Execution and Roadmap (5)





Action Plan : Economic Concept

	2008-	2045	204.0	2017		2018		2019		2020	
	2014	2015	2016	Sem 1	Sem 2						
Setting the economic model of the TSEZ											
Identifying major sectors which show greatest											
compatibility and propensity for growth											
Preliminary contacts with potential operators and											
developers for potential investors											
Setting programs for Technical support, Technical											
education and vocational training											

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Execution and Roadmap (6)





Action Plan : Coordination and Cooperation

	2008-			2017		2018		2019		2020	
	2014	2015	2016	Sem 1	Sem 2	2 Sem 1	Sem 2	Sem 1	Sem 2	Sem 1	Sem 2
Discussions and coordination with different public services institutions to facilitate licenses											
Close coordination with Port of Tripoli authorities and customs service											
MoU and coordination with CCIAT and business community in Tripoli											
Intensify contacts with the overall Lebanese business community											
Engage studies and research to benchmark with other similar foreign zones											
Engage contacts with potential developers and operators for the site											



Execution and Roadmap (7)





Action Plan : Financial Agreements

	2008-	2015	2016	20	17	17 20		2019		20	20
	2014	2015	2010	Sem 1	Sem 2						
Allocation of 15 millions dollars by the Lebanese											
Government for the project's infrastructure											
Pledges for 69 millions dollars in the framework of the											
Program for Result loan loan from the World Bank											



Execution and Roadmap (8)





Action Plan : Implementation Actions

	2008-	2015	2016	20	17 20		18	2019		2020	
	2014	2015	2010	Sem 1	Sem 2						
Filling consolidation											
Basic infrastructure phase one											
Execution of the first phase of the Knowledge and											
Innovation Space at the Rachid Karami Fair site											

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Execution and Roadmap (9)





Action Plan : Communication

	2000			20	17	2018		2019		2020	
	2008- 2014	2015	2016	Sem 1			Sem 2	Sem 1	Sem 2	Sem 1	Sem 2
Set the communication and promotion action plan for the TSEZ											
Discussions and promotion of the TSEZ within the Lebanese business community											
Contacts with the business communities, including Diaspora and regional clients											

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Part 4 : Business Community Support and Advocacy





- > Associate the national business community to the project implementation and success
- Positive contagion effect
- Objectives of the business advocacy
- > Framework to support the TSEZ by the Lebanese business community: The action plan

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Associate the National Business Community to the Project Success

- As proven in many emerging countries, including in the MENA region, if implemented in the right context, Special Economic Zones (SEZs) can be an effective instrument to promote economic and business development in specific areas, and may well have a positive impact on the entire national economy
- The limitation of the support of an SEZ to the public authorities and the local business community is not sufficient to ensure the success of this kind of operation, and such projects need the support of the whole national business associations
- Therefore, it is important to associate the global Lebanese business community to the efforts deployed to ensure the success of the TSEZ implementation, especially that any eventual success of the project will positively influence the whole national economy
- In addition, opportunities that the TSEZ is expected to offer, will not be confined to investors, operators and developers in the region of Tripoli, but they may well extend to a large number of Lebanese investors, operators and developers in other regions, as well as to regional and international investors



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Positive Contagion Effect: TSEZ as a Role Model

- A contagion effect can be explained as a situation where a "shock" in a particular economic sector or in a specific region, spreads out and affects the global economy. Therefore, the TSEZ initiative is expected to induce a "positive contagion effect" in Tripoli and its close vicinities, and might affect as well the different regions in the country " Local opportunities - Global business."
 - Special Economic Zones are instrumental when it comes to linking local businesses with their global growth opportunities
 - The improved business environment in a major region of the country, can act as a catalyst for national economic growth
 - This advantage is most pronounced in times of economic difficulties, investing in infrastructure and improving the business environment are major key ingredients for economic recovery. Business community believes that such projects (among others) are expected to foster growth and enhance competitiveness in Lebanon
 - TSEZ's attractiveness is not limited to Tripoli and the northern region: All Lebanese operators may invest in this new attractive site
 - The application of simplified business measures could be extended to all activities and regions





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Objectives of the Business Advocacy Action Plan





- The advocacy action plan aims at achieving three main objectives:
 - To ensure a strong legacy for the TSEZ project which implementation started in November 2008
 - To ensure sustainability and continuity for this long term investment in Lebanon, through commitment, tangible objectives and supportive actions
 - Take into consideration the uniqueness of the TSEZ : Countless advantages, a diversity of opportunities, and especially a high proportion of prospects and positive impact on Lebanon's business environment
- TSEZ is also a pioneering project for some new business experiences, including:
 - A multiple face program to improve the business competitiveness environment
 - An opportunity to introduce Public-Private Partnerships projects to promote economic 18.12.2017
 development in the northern areas of Lebanon







Action	Specific topic	Activities
		Stakeholders' mapping with chambers and business associations
		Sign a MoU between TSEZA and the chambers and business associations
		Identify and define networking and supportive events
1	Initiate the business community's mobilization:	Awareness and communication campaigns
	set the action plan	Presentations / roadshow agenda
		Partnerships and collaboration with business sector associations
		Champion/ Establishment of a strategic steering committee
		Assign a specific role for the CCIAT and the business associations

Remark: All steps of the advocacy strategy and action plan will be set under the direction and in coordination with the Tripoli Special Economic Zone Authority (TSEZA)







Action	Specific topic	Activities							
		Identify specific stakeholders interested in infrastructure construction and operation management							
2	Identification of potential	List of potential local and international investors							
_	investors in infrastructure and operations management	Financial schemes and participation models							
	and operations management	Business community impact for best practices							
		Conferences and events							

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Action	Specific topic	Activities
		Identify potential tenants in Lebanon and potential international investors specially in the MENA region.
2	Dromoto invoctment and	Presentations/roadshow by countries and sectors of activity
3	Promote investment and attract investors/tenants	Regular meetings with potential investors/ specific needs
		Benchmark with other regional and international SEZs and collect data on best practices
		Address specifically the Lebanese Diaspora Entrepreneurs

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Action	Specific topic	Activities
		A communication and promotional plan is proposed to improve the zone's attractiveness
Λ		Identify available support; both financial and non-financial incentives are determined
4 communication	Communicate on different events in preparation and invite entrepreneurs to participate including Diaspora executives	
		Invite experts and specialists to improve services and management advantages

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Action	Specific topic	Activities
	Eossyning to improvo	Establish a lobbying group
5	5 administrative and regulatory processes/	Identify obstacles and implement modifications when needed to ease and speed up businesses
	practices	Intolerance of fraudulent practices within the TSEZ area

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Action	Specific topic	Activities
		Set key indicators for monitoring and assessment
		Regular reports, fact findings and analysis
6	Evaluation and monitoring	Initiate recommendations and adjustments measures when needed.
		Identify actions and measures which could be extended in the benefit of the Global economy
		Extend support to cover the new ICT extension at the Rachid Karami Fair centre

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Conclusion and Key Success Factors





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Designed as a promising platform to boost the economic development in North Lebanon area, the Tripoli Special Economic Zone "would be a vibrant economic zone" (Ban Ki Moon).

Conclusion

- To achieve its objectives, the project is expected to rely on a dynamic approach involving the management team in direct charge of the venture, the regional and national public authorities, and the local and global Lebanese business community.
- Mobilizing the business community to support this project is not only intended to ensure the success of this zone of activity, but also to help expanding investment opportunities for all domestic firms and improving the business climate in the country.
- The establishment of the TSEZ is considered as a major development hub to attract local and foreign investments aiming to develop business activities in the North area, to create jobs, to generate exports and to positively impact the " Doing business environment" in Lebanon.







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Conclusion

- Based on multiple advantages proposed by its regulation framework, its modern infrastructures, and its efficient management concept, the TSEZ offers a large number of benefits including:
- > A new vibrant business momentum in Tripoli after years of instability and exclusion
- An opportunity to participate to the TSEZ infrastructure investments and operation tasks
- > The multiple advantages offered by the TSEZ to any direct investment in the area
- The possibility to offer products and services to operators established within the TSEZ
- The positive contagion effect of the TSEZ experience to improve the overall business environment in Lebanon





Advocacy Support: Key Success Factors

- Despite its "informal character", the advocacy approach in favor of the TSEZ project needs a clear and dynamic action strategy led by the national business organizations, with a prime goal to join forces and to:
 - Initiate the business community's mobilization
 - Clearly define objectives, demands, target actions to assure the success of the project
 - Identify potential investors in infrastructure and operations management
 - Promote investment and attract investors/tenants
 - Set an information and communication strategy
 - Lobby to improve Administrative and regulatory processes/ practices
 - ✓ Set an evaluation and monitoring pattern

Remark: All steps of the advocacy strategy and action plan will be set under the direction and in coordination with the Tripoli Special Economic Zone Authority (TSEZA)



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Annex 1: Case Study: Discussions with Major Lebanese Companies for Warehousing and Logistics





- Meetings with different groups and companies in this fields to define their needs and specific requirements to set business on the TSEZ site.
- Three type of potential tenants:
 - ✓ Car dealers importers
 - ✓ Fast-moving consumer goods (FMCG) importers and agents
 - Logistics companies

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