

الجمهورية اليمنية
وزارة التخطيط والتعاون الدولي
قطاع الدراسات الاقتصادية والتوقعات

التقرير الاقتصادي النصف

سنوي 2007

للسكوريات الاقتصادية الدولية والإقليمية

وانعكاساتها على الاقتصاد اليمني

2008

فريق إعداد التقرير النصف سنوي الثاني 2007

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المحتويات

| | | |
|----|-------------------|---|
| 5 | | |
| 6 | | |
| 8 | | |
| 13 | | |
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| 15 | | .1 |
| 16 | | 1.1 |
| 18 | | .2.1 |
| 20 | | .3.1 |
| 24 | | .4-1 |
| 26 | | .5-1 |
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| 29 | | 2006 |
| 30 | | 2006 |
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| 35 | | .2-2 |
| 39 | | .3-2 |
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| 44 | | .5-2 |
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| 79 | | 2007 |
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| 82 |2007 | .1 |
| 84 | | .1-1 |
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الجداول

| | | |
|----|------------------|------|
| 14 | | (1) |
| 16 |() | (2) |
| 22 |(2007-2005) | (3) |
| 27 | | (4) |
| 29 | | (5) |
| 31 | | (6) |
| 32 | | (7) |
| 36 |2004 1999 | (8) |
| 37 |2004 1999 | (9) |
| 38 |2004 1999 | (10) |
| 41 |2006-2004 | (11) |
| | 15 | (12) |
| 42 |2005 | |
| 49 |2005 2004 | (13) |
| | | (14) |
| 50 |2005-1985 | |
| 51 |(2005-1995) | (15) |
| 52 |2005 2000 | (16) |
| 55 |(2006-2000) | (17) |
| | | (18) |
| 58 |(2006-1992) | |
| 61 |(2006-1992) | (19) |
| 61 |(2006-1992) | (20) |
| 83 |2007 | (21) |
| 84 |2007 | (22) |
| 85 | | (23) |
| 86 |2007 | (24) |
| 87 |2007 | (25) |
| 94 | | (1) |

تصدير

2007

والله الموفق،،

**عبد الكريم إسماعيل الأرحبي
نائب رئيس الوزراء للشؤون الاقتصادية
وزير التخطيط والتعاون الدولي**

مقدمة

2007

2000

.2007

2001 (19)

2007

د. محمد احمد الحاوري
وكيل الوزارة
لقطاع الدراسات والتوقعات الاقتصادية

ملخص تنفيذي

2005 % 4.9 % 5.4 2006

2006

2008-2007

.2006

2006

2007

.%2.2

2006

2006

.2005

% 3.7

% 3.8

2006

76

.% 10

%57

(2006-2004)

% 6.5

2006

% 6

2006

.2006

2006

.2006

2006

2005

% 9

19.3

% 15-12

15

2.9

%16

2006

% 47.4

%17

1.200

.2006

% 40

500

.% 6.3

2006

15

2005

% 15.3

% 29.2

%2.5

.%50

2004

% 16.3

1999

%11.5

689

2004

% 53

.1999

% 48.4

(2010-2006)

%12

916

1.200

% 29

2005

.2006

2006

2005

334

2005

20

36.4

2005

(2005 - 2000)

25.3

6.6

(2006 - 1992)

341.4

2006

(2006 - 1992)

%85.6

%13.9

2000

.2007

2001

(19)

2007

2007

2007

139

2007

122

2007

2006

.2007

17

11

%27 2007

%88.8

التطورات الاقتصادية العالمية

1. **التطورات الاقتصادية الدولية والإقليمية والعربية وفي اليمن**

2006

2006

2006

2006

جدول رقم (1) معدلات النمو الاقتصادي العالمي وفي أهم الكتل الاقتصادية الإقليمية

| *2007 | 2006 | 2005 | 2004 | الكتل الاقتصادية والدول |
|-------|------|------|------|-------------------------|
| 4.9 | 5.4 | 4.9 | 5.3 | |
| 2.5 | 3.1 | 2.6 | 3.2 | |
| 2.6 | 3.4 | 3.2 | 3.9 | |
| 2.3 | 2.6 | 1.4 | 2.0 | |
| 2.2 | 2.2 | 1.9 | 2.7 | |
| 7.5 | 7.8 | 7.5 | 7.7 | |
| 6.2 | 5.5 | 5.6 | 5.8 | |
| 5.5 | 6.0 | 5.5 | 6.6 | |
| 7.0 | 7.7 | 6.6 | 8.4 | |
| 9.4 | 9.3 | 8.7 | 8.8 | |
| 10.0 | 10.7 | 10.4 | 10.1 | |
| 8.4 | 9.2 | 9.2 | 7.8 | |
| 5.5 | 5.7 | 5.4 | 5.6 | |
| 4.9 | 5.5 | 4.6 | 6.0 | |
| - | - | - | - | 2007 |

2007

2006

% 33.6

% 22.0

.(2006 -2005)

2-1. التضخم العالى:

2006

Core Inflation)

(

| () | | | | (2) |
|-------|------|------|------|-----|
| *2007 | 2006 | 2005 | 2004 | |
| 1.8 | 2.3 | 2.3 | 2.0 | |
| 1.9 | 3.2 | 3.4 | 2.7 | |
| 2.0 | 2.2 | 2.2 | 2.1 | |
| 0.3 | 0.2 | 0.6- | - | |
| 2.2 | 2.1 | 2.1 | 1.7 | |
| 5.4 | 5.3 | 5.4 | 5.6 | |
| | | | | |
| 10.8 | 9.5 | 8.5 | 8 | |
| 4.8 | 5.0 | 4.8 | 6.1 | |
| 9.0 | 9.5 | 12.4 | 10.3 | |
| 3.9 | 4.0 | 3.6 | 4.1 | |
| 10.6 | 7.9 | 7.1 | 7.2 | |
| 5.2 | 5.4 | 6.3 | 6.5 | |
| 2.2 | 2.3 | 2.3 | 2.3 | |
| 2007 | | | - | |

2006 %3.8

.2005 %3.7

(2)

2006

% 5.25

2006

17

%1

26

.%2.25

2006

2

2005

% 3

%

2006

% 0.25

2006

)

2005

(

%5.3

%5.4

%3.4

%3.2

2006

2005

% 0.6 -

2006

%0.2

2005 2006 2005 2006
%1.8 %1.5
.2006 2005 %2.2

3-1. ارتفاع أسعار النفط والمعادن والسلع الزراعية وأثرها على التضخم

العالمي:

2006
()
()
.2006
%16
76 2006
" "
2006
66-55
2006 2007 77 2007
%0.6
2006
0.14

2006 0.7
2006
0.8 2006
2005 1.3
2006 1.3
2006 (OCED)
0.5
(2006-2004)

2006

2006

2006 % 57
(Nonenergy Commodity)
% 10

.2006

%4

%2.2 -

.2006

.1990

2006

% 28

) 2006

%70 - 60

.(

%25

2006

4-1. التطورات الاقتصادية في الدول العربية:

%5

% 5.1

2006

2006

% 2.5

% 6.5

2006

%6

.%5.4

2006

2006

2006 -

2005

.% 1

.% 6

7.5

2

2005

5.8

% 7.5

2006

% 7.4

-

%12.1

%

. (3)

2006

-

2006

2005

2004

2006

%5.9

2007

2006

%6.6

2006

%4.2

2007

%3.8

.(3)

%90

%50

%8.9

%8.2 2006

| (3) | | | | | |
|---------------|------|-------|------|--------|------|
| (2007 -2005) | | | | | |
| % | | | % | | |
| 2007 | 2006 | 2005 | 2007 | 2006 | 2005 |
| 5.5 | 2.5 | 1.6 | 2.5 | 2.7 | 5.3 |
| 2.0 | 3.3 | 1.0 | 3.7 | 7.3 | 1.7 |
| 3.0 | 4.5 | 2.0 | 5.6 | 5.3 | 4.0 |
| 9.2 | 7.2 | 8.5 | | 12.2 | 8.6 |
| 3.5 | 3.6 | 3.1 | 4.7 | 4.2 | 3.2 |
| 12.3 | 4.2 | 8.8 | 5.3 | 6.9 | 4.6 |
| 5.7 | 6.3 | 3.5 | 5.0 | 6.3 | 7.3 |
| 3.5 | 5.6 | 0.7- | 4.5 | 5.5 — | 1.0 |
| -- | -- | -- | .. | 12.0 — | 6.0 |
| -- | -- | -- | 3.5 | 4.0 | 3.7 |
| 8.0 | 10.0 | 7.2 | 3.2 | 5.1 | 4.5 |
| 21.1 | 21.6 | 11.8 | 2.5 | 3.9 | 3.8 |
| 3.0 | 3.0 | 2.6 | 6.7 | 7.0 | 6.9 |
| 2.8 | 3.0 | 4.1 — | 5.6 | 6.2 | 8.5 |
| 16.2 | 3.4 | 2.0 | 7.5 | 8.1 | 8.4 |
| 3.8 | 3.2 | 1.9 | 5.7 | 6.4 | 5.6 |
| 10.0 | 11.8 | 8.8 | 10.6 | 12.1 | 11.0 |
| 2.8 | 2.3 | 0.7 | 5.7 | 5.8 | 6.6 |
| 6.2 | 10.1 | 7.8 | 8.5 | 10.7 | 8.5 |
| 7.9 | 6.2 | 12.1 | | 11.7 | 5.4 |
| | | | 3 | 1.2 | 4.2 |
| | 5.3 | 5.5 | | 6.5 | 6.0 |

%23

%6 2007

(3)

2007

W.B,MENA Economic developments and Prospects Report :

2007 April2007

IMF, World Economic outlook, April2007.

13

2007

2006

*

)2007-2006

:

2 2007

2

(2007

2007

() 2007-2006

.3

%7

2006

2007

%10.6 %12.1

.%7.4

2004

%29 2006

%.62

%10 2006 %6.5

2007 %4.9

2005 %8.5

2007 %5.6

2006 %6.2

.(3)

2007

.2010

%5.8 2006 %6.4

2007

2007 %5.1

2006 %6.1 2005 %7.8

%5.5 2007

2006

%8.1 2005 %8.4

%1.4 %5.3

2006

%2.7 -

2006

.2005

2006

.2005

()
% 20.2 2006 205 %25.5 %14.6
33.6 % 22.0
.(2006 -2005) %

2006
2005 % 4.6 % 3.3
46.1 133.4
%8.0-
.2005 %0.7-
2006 85.2
86.6

2006
2007 % 5.3 % 4.9
% 5.5

2007
% 12.2 -
177.1

(2010 -2006)

%7.1

%10.1

%62

%21

1

(3)

% 2.5

(%3.9 % 3.8) 206 2005

.2007

2. تطور المشتغلين والبطالة عالمياً وإقليمياً وفي الوطن العربي

¹ للمزيد انظر : وزارة التخطيط والتعاون الدولي، خطة التنمية الاقتصادية والاجتماعية الثالثة للتخفيف من الفقر (2006- 2010) ، صنعاء أغسطس 2006 ، ص 39-51.

.2004

1-2. تطور العمالة في عام 2006 على المستوى العالمي

2.9 ()

%16.6

2

%1.6

2006

(2006-1996)

| () | | | | | | (4) |
|--------|------|------|--------|--------|--------|-----|
| **2006 | 2001 | 1996 | 2006 | 2001 | 1996 | |
| 17.6 | 21.7 | 24.0 | 507.0 | 578.6 | 594.6 | |
| 2.1 | 6.2 | 7.5 | 3.5 | 10.3 | 12.4 | *** |
| 12.1 | 19.6 | 20.3 | 95.0 | 147.0 | 145.0 | |
| 11.1 | 12.7 | 17.0 | 29.6 | 30.9 | 37.4 | |
| 34.4 | 43.2 | 53.8 | 196.9 | 222.3 | 250.8 | |
| 11.3 | 12.7 | 12.1 | 27.2 | 27.4 | 22.9 | |
| 2.8 | 3.3 | 3.0 | 3.5 | 3.4 | 2.6 | |
| 55.4 | 56.9 | 57.3 | 151.3 | 137.3 | 123.5 | |
| 47.4 | 52.2 | 54.8 | 1367.8 | 1394.1 | 1354.7 | |
| 10.5 | 31.0 | 33.0 | 18.0 | 51.4 | 54.5 | *** |
| 44.2 | 55.0 | 61.9 | 347.2 | 412.6 | 442.9 | |
| 56.9 | 61.2 | 64.7 | 151.6 | 148.4 | 142.3 | |
| 87.2 | 89.1 | 91.1 | 498.2 | 458.8 | 425.0 | |
| 30.9 | 33.6 | 35.4 | 74.5 | 72.4 | 67.3 | |
| 34.7 | 39.5 | 41.3 | 42.8 | 40.5 | 35.8 | |
| 86.3 | 86.8 | 86.5 | 235.5 | 209.5 | 186.3 | |

ILO; Global Employment Trends Brief , January 2007,page 11 :

*** 2006 **

%62.6

61.4 1996

%

2006

% 1.6

% 17 ()

507

2006

² يقصد بالأفراد المشغولين أو العاملين (in work) كل الأفراد المشغولين في أعمال خاصة بهم، والمشغولين والعاملين لحساب الغير، إلى جانب أعضاء الأسرة العاملين بدون أجور.

| | | | | |
|--------|-------|---------|-------|--------|
| | | 197 | | |
| | | 95 | | 151 |
| | | .(4) | | |
| | 1,368 | | | |
| | | 2006 | | % 47.4 |
| % 87.2 | | | | |
| . | %44.2 | | %86.3 | |
| % 57 | | (152) | | |
| | | | | .(4) |
| | | 1.2 | | |
| | | 2006 | | % 40 |
| | | %39.9 | 1996 | |
| | | | . | 1.1 |
| 67 | | | | |
| 1996 | 100 | 66 | 2006 | 100 |
| % 52.4 | | | | |
| | | | .1996 | %53 |
| | | | | 2006 |
| | | 100 | 80 | |
| | | 73 | 75 | |
| | | | | 69 |

37)

(100 42)

. (3 100

2-2. البطالة على المستوى العالى فى عام 2006

% 3.9

500 2006

195.2

2006 % 6.3

% 6.4

- 1996)

2002 % 6.7

(2006

| (5) | | | | | | | | |
|-----------|-----------|------|------|------|------|------|-----------|--------|
| | (%) | (%) | | | | | | |
| 2006-1996 | 2006-1996 | 2006 | 1996 | 2006 | 2005 | 1996 | 2006-2001 | |
| 4.1 | 1.6 | 61.4 | 62.6 | 6.3 | 6.4 | 6.1 | 0.2— | |
| 2.6 | 0.7 | 56.7 | 55.9 | 6.2 | 6.8 | 7.8 | 0.4— | |
| 4.3 | 0.3 | 53.0 | 54.8 | 9.3 | 9.4 | 9.7 | 0.5— |) (|
| 8.2 | 0.9 | 71.6 | 75.1 | 3.6 | 3.5 | 3.7 | 0.3— | |
| 4.1 | 2.2 | 66.1 | 67.5 | 6.6 | 6.6 | 3.7 | 0.7 | |
| 6.1 | 2.1 | 56.5 | 58.4 | 5.2 | 5.2 | 4.4 | 0.2 | |
| 3.0 | 2.4 | 60.3 | 58.5 | 8.0 | 8.1 | 7.9 | 0.5— | |
| 4.6 | 3.5 | 47.3 | 44.9 | 12.2 | 12.3 | 13.0 | 1.1— | |
| 4.0 | 2.5 | 67.0 | 68.8 | 9.8 | 9.7 | 9.2 | 0.5— | |

المصدر: ILO, Global Employment Trends, Brief, January 2007

%20.8 % 21.4

| (6) | | | | | |
|--------|-------|------|------|------|-----|
| **2006 | *2006 | 2005 | 2004 | 1996 | |
| 41.6 | 38.7 | 39.7 | 40.5 | 43.1 | |
| 35.1 | 3.2 | 3.3 | 3.5 | 5.2 | |
| 44.1 | 22.0 | 22.7 | 23.2 | 26.2 | *** |
| 47.8 | 48.3 | 50.3 | 51.5 | 54.0 | |
| 42.3 | 74.0 | 48.1 | 48.1 | 51.0 | |
| 36.3 | 51.7 | 52.8 | 54.1 | 59.3 | |
| 21.0 | 18.8 | 19.3 | 19.3 | 23.2 | |
| 32.3 | 29.7 | 30.5 | 30.0 | 29.7 | |
| 43.7 | 63.0 | 63.4 | 65.2 | 68.1 | |
| 32.1 | 21.3 | 20.8 | 20.6 | 21.4 | |
| 23.0 | 24.2 | 24.3 | 24.9 | 28.5 | |
| 31.9 | 27.7 | 27.5 | 27.3 | 27.9 | *** |
| 42.3 | 25.8 | 24.6 | 24.0 | 25.2 | |
| 36.4 | 17.8 | 17.3 | 17.3 | 16.4 | |
| 27.4 | 18.8 | 18.2 | 17.7 | 15.4 | |
| 28.9 | 19.8 | 19.6 | 20.0 | 20.3 | |
| 12.6 | 22.9 | 22.5 | 22.4 | 21.7 | |
| 26.7 | 8.8 | 8.7 | 8.6 | 9.0 | |
| 42.2 | 40.0 | 39.5 | 38.9 | 35.5 | |
| 52.3 | 72.7 | 72.4 | 71.6 | 66.4 | |
| 52.5 | 50.3 | 49.8 | 49.5 | 45.8 | *** |
| 40.0 | 25.8 | 25.1 | 42.5 | 20.7 | |
| 44.6 | 35.2 | 34.6 | 34.6 | 32.7 | |
| 17.6 | 29.5 | 28.9 | 28.2 | 25.3 | |
| 49.2 | 61.4 | 61.1 | 60.6 | 56.5 | |
| 25.5 | 47.4 | 47.0 | 47.6 | 48.6 | |
| 46.1 | 28.8 | 27.9 | 26.2 | 22.9 | |

المصدر: ILO; Global Employment Trends Brief, January 2007 page 12:

**بيانات عام 2006 تقديرية

*

- 1996)

(2006

1996 %35.5

2006 %40.0

% 47.4 % 48.6

4-2. التشغيل والبطالة في المنطقة العربية

2005 %2.0 %29.2
 %50.0
 314.2
 102.3 %32.2 (15)

جدول (7) السكان ذوي النشاط الاقتصادي (15 سنة فأكثر) والمستوى العام للبطالة في البلدان العربية لعام 2005

| البلد | النسبة المئوية (%) | عدد السكان (ملايين) | عدد السكان ذوي النشاط الاقتصادي (ملايين) |
|-------|--------------------|---------------------|--|
| | 15.70 | 200,000 | 1,273,300 |
| | 2.30 | 59,041 | 2,567,000 |
| | 3.40 | 18,768 | 522,000 |
| | 15.20 | 512,588 | 3,372,294 |
| | 15.30 | 1,475,000 | 9,656,000 |
| | 50.00 | 143,700 | 287,400 |
| | 5.70 | 382,755 | 6,715,000 |
| | 18.50 | 2,600,000 | 14,052,000 |
| | 8.08 | 412,860 | 3,372,294 |
| | 24.00 | 1,065,000 | 9,656,000 |
| | 29.20 | 2,366,952 | 287,400 |
| | 7.50 | 68,550 | 6,715,000 |
| | 23.50 | 194,000 | 14,052,000 |
| | 2.00 | 9,500 | 3,372,294 |
| | 2.30 | 36,676 | 9,656,000 |
| | 8.20 | 90,744 | 287,400 |
| | 17.20 | 286,485 | 3,372,294 |
| | 10.70 | 2,267,000 | 9,656,000 |
| | 15.70 | 1,748,980 | 287,400 |
| | 22.00 | 191,840 | 6,715,000 |
| | 16.30 | 834,057 | 14,052,000 |
| | 15.30 | 14,964,496 | 102,253,866 |

15)
 (%53.3
 %72.6
 %24.2
 %38
 %76.5
 %57.3
 %92.1
 %11.4
 %64.5

(7)

.2005

15

%15.3 2005

%7.5

%2.0

17

12

%15

%22

.%10

%50

%29.2

%24.0

.(7)

18

)

(

(2005-2000)

102 2000

55

%3.7

2005

%55.9

%54.1

%14.3

12

8

%10.8

2000

%12.2

.2006

%10.3

2005 2000 %31 %28 1990 %24

.(7)

4.

-1

-2

%2.4

-3

%3

%1.0

(2007 – 2001)

%.5.6

-4

%90

-5

%59

%79

%80

%86

%50

3.4

780

765

%8

%6.7

%6

%18

⁶ انظر على سبيل المثال:

د. ناصر جاسم الصانع ود. محمد عننان وديع، التعليم وسوق العمل في الأقطار العربية، المعهد العربي للتخطيط، الكويت 2003 ص 143 – 149.
الأثر على سوق العمل، كتاب الأهرام الاقتصادي، العدد 182، أول فبراير 2003. ص 17- 79.

-6

-7

-8

5-2. المشتغلين والبطالة في اليمن⁵

(2004-1999) %16.3 %11.5

1.170

2.375

2004 1999

(2004-1999)

3.729

2004

4.244

3.433

.1999

311

515

| وفقاً لمسح القوى العاملة 1999 و تعداد 2004 (8) | | | | | | |
|--|-------|-------|-------|-------|-------|---------|
| 2004 | | | 1999 | | | / |
| | | | | | | |
| 83.7 | 60.5 | 86.9 | 86.3 | 74.6 | 87.5 | %() |
| 16.3 | 39.5 | 13.1 | 13.7 | 25.4 | 12.5 | %**() |
| 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | % |
| 4.244 | 515 | 3.729 | 3.433 | 311 | 3.122 | () () |

2.964

1999

3.555

2004

2004

.157-107

2006

-5

1999 %86

.2004 %84

)

6.(

689

1999

469

.%16.3

%13.7

2004

%13.1

%12.5

%39.5

%25.4

-15)

3,555

2004

%26.1

(24

1999

%26.0

59-25)

2004

%67.5

1999

%65.9

(

%8.1

(60)

%6.4

2004

689

)

%23.8

(

2004

()

()

%75.1

1999

469

%37.2

%62.8

(2004-1999)

2004

| 2004 | | | 1999 | | | (9) | | | |
|---------|--------|---------|-----------|---------|-----------|-----------|---------|-----------|---------|
| % (/) | | | % 2004 | | | % 1999 | | | |
| 0.01 | 5.5 | 0.4- | 26.1 | 33.0 | 25.5 | 26.0 | 27.5 | 25.9 | 24 - 15 |
| 1.6 | 6.2 | 1.2 | 67.5 | 61.6 | 68.0 | 65.9 | 55.4 | 66.8 | 59 - 25 |
| 1.7 - | 11.7 - | 0.8- | 6.4 | 5.4 | 6.5 | 8.1 | 17.1 | 7.3 | 60 |
| | | | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | |
| | | | 319.948 | 28.498 | 291.451 | 25.232 | 1.786 | 23.446 | |
| 591.000 | 79.000 | 512.000 | 3.555.000 | 311.000 | 3.244.000 | 2.964.000 | 232.000 | 2.732.000 | |
| .2006 | | | 2004 | | | | | | المصدر: |

2004

1999

. 1999

485 2004

%67.4

%31.5

1999

%31.7

%68.3

390

%5.5

204

2004

%64.3 %35.7

%93.5

79

1999

%52.9

2004

. 1999

%48.4

1999

%49.8

%44.5

59

25

(10) . 1999 %1.8 %2.6
 .2004 1999

| وفقاً لمسح القوى العاملة 1999 و تعداد 2004 (10) | | | | | | | | | |
|---|---------|---------|---------|---------|--------|--------|---------|---------|-----------|
| / | % 2004 | % 1999 | / | % 2004 | % 1999 | / | % 2004 | % 1999 | () |
| 4.48 + | 52.91 | 48.43 | 1.14 - | 54.61 | 55.75 | 5.25 + | 52.19 | 46.94 | (24 - 15) |
| 5.38 - | 44.44 | 49.82 | 0.71 + | 44.17 | 43.46 | 6.56 - | 44.55 | 51.11 | (59 - 25) |
| 0.88 + | 2.63 | 1.75 | 0.41 + | 1.20 | 0.79 | 1.28 + | 3.23 | 1.95 | (60) |
| 0.02 + | 0.02 | - | 0.02+ | 0.02 | - | 0.03 + | 0.03 | - | |
| | 100.0 | 100.0 | | 100.0 | 100.0 | | 100.0 | 100.0 | |
| | 62.389 | 3.955 | | 18.617 | 608 | | 43.772 | 3.347 | |
| 220.000 | 689.000 | 469.000 | 125.000 | 204.000 | 79.000 | 95.000 | 485.000 | 390.000 | |
| 2004 | | | | | | | | | : |
| | | | | | | | | | .2006 |

4.436 %12 802 2010 -2006
 . %4.1
 % 7.1

7 .

⁷ للمزيد انظر، وزارة التخطيط والتعاون الدولي، خطة التنمية الاقتصادية والاجتماعية الثالثة للتخفيف من الفقر، 2006-2010، أغسطس 2006

3. تطور الاستثمار الأجنبي المباشر

مقدمة

...

3-1. التطور العالمي للاستثمار الأجنبي المباشر

| | | | | |
|------|-------|-------|---------------|---|
| 29 | 2005 | 916 | 2004 | % |
| 2000 | 5.803 | | (2005 – 2000) | |
| | | .2005 | 10.130 | |

2006

1.200

(11)

.(2006-2004)

1990 – 1982

203

59

1.490

2000

.1990

203

2000

618

2001

832

2003

2003

558

.2005 2004

2005

2005

% 20

% 88

.

6.134

716

% 63

454

2005

"

"

()

| (11) | | | | |
|---------------|------------|------------|------------|------|
| (2006 -2004) | | | | |
| % | 2006* | 2005 | 2004 | / |
| 34.3 | 230.4 | 916.3 | 710.8 | |
| 47.7 | 800.7 | 542.3 | 396.1 | |
| 36.0 | 589.8 | 433.6 | 217.7 | |
| 30.1 | 549.0 | 421.9 | 213.7 | 25 |
| 31.7 | 510.7 | 387.9 | 185.2 | (15) |
| 39.0 | 88.4 | 63.6 | 31.4 | |
| 75.1- | 8.1 | 32.7 | 15.1- | |
| 50.2 | 30.0 | 20.0 | 16.8 | |
| 3.2 | 169.8 | 164.5 | 56.2 | |
| 12.8 | 38.4 | 34.0 | 28.5 | 10 |
| 50.8- | 5.4 | 11.0 | 5.0 | |
| 7.3- | 6.2 | 6.7 | 4.7 | |
| 78.2 | 177.3 | 99.4 | 122.4 | |
| 395.5- | 8.2- | 2.8 | 7.8 | |
| 10.0 | 367.7 | 334.3 | 275.0 | |
| 26.5 | 38.8 | 30.7 | 17.2 | |
| 1.9- | 5.3 | 5.4 | 2.2 | |
| 51.2- | 1.4 | 2.9 | 1.1 | |
| 42.7- | 3.7 | 6.4 | 0.8 | |
| 4.5- | 99.0 | 103.7 | 100.5 | |
| 15.0 | 229.9 | 200.0 | 157.3 | |
| 76.3 | 17.1 | 9.7 | 2.8 | |
| 13.1 | 186.7 | 165.1 | 138.0 | |
| 3.3- | 70.0 | 72.4 | 60.6 | |
| 15.4 | 41.4 | 35.9 | 34.0 | |
| 44.4 | 9.5 | 6.6 | 5.5 | |
| 56.2 | 62.0 | 39.7 | 39.6 | |
| 94.6 | 28.4 | 14.6 | 15.4 | |
| 34.1 | 8.6 | 6.4 | 6.5 | |
| 275.5 | 6.5 | 1.7 | 4.1 | |

UNCTAD, World Investment Report 2006 and Unctad Investment :
Brief, Number 1, 2007..
2006 *

37
60 1993
2003
77 2004
770
)
4.5 (
62

6 - 5) 10 5

.(

2.2 (2001 -1994)

(2003 2002)

71.4

| 15 12) | |
|--------|-------|
| 2005 | |
| () | |
| 2005 | |
| 470 | () 1 |
| 123 | 2 |
| 120 | 3 |
| 111 | 4 |
| 97 | 5 |
| 72 | 6 |
| 46 | 7 |
| 44 | 8 |
| 39 | 9 |
| 36 | 10 |
| 34 | 11 |
| 28 | 12 |
| 23 | 13 |
| 21 | 14 |
| 14 | 15 |
| 1400 | |

UNCTAD, World Investment Report :
2006.

52.5 43.8

.2005 2004

73

53

(2004 -2000)

GENERAL Electric

Vodafone

100

Group PIC

2004

% 19

2004

8.9

) % 53.4

2003 % 10.3

%13.5 3.5

.(4.7

2004 6.1

%55.8 2003

14.9

.(7.4)
%12 %16 %11

2005 109 6

100 1995 .2006
100

337 % 31.4 2004
738 . 1.073
323
1.1 3.4

100 2004 449

40
10 14
% 50

77

2-3. الاتجاه الإقليمي للاستثمار الأجنبي المباشر

2005

| | | | | |
|--------|-------|---------------|---------------|--------|
| | | 59.2 % | 542.3 | |
| | 396.1 | 2004 | 37 % | |
| 55.7 % | | | | |
| | 800.7 | 2006 | 48 % | |
| | | 2004 | | |
| | 2001 | | 2006 | 2005 |
| | | 80.4 % | 2000 | |
| | | (1999 - 1994) | | 68.2 % |
| 2006 | 2005 | | (2004 - 2001) | |
| | | | (11) | |

| | | | | |
|--------|------|--------|---------------|--------|
| 2005 | | | | |
| | | 36.5 % | 334 | |
| | 39.7 | | | |
| | | 30.9 % | | 4.3 % |
| 18.9 % | 2000 | | (1999 - 1994) | |
| | | | (2004 - 2001) | |
| | | | | 2005 |
| | | | | |
| | 368 | | 2006 | 10.0 % |

1-2-3. تطور حجم تدفق الاستثمار في الدول المتقدمة

(2005 - 2001)

| | | | | |
|--|---------------|--------|-----|--------|
| | | 44.3 % | | |
| | | | 321 | |
| | (2005 - 2001) | | | 43.3 % |

| | | | | |
|-----------------------|-------------|------|-----------------------------|-------|
| | | % 98 | | 315.7 |
| | | | 2005 | |
| | | | | 421.9 |
| | | | | 164.5 |
| | | | .1977 | 2005 |
| Royal Dutch Petroleum | | | Shell Transport and Trading | |
| 2005 | | | | 74 |
| | | 44 | 63.6 | |
| .2004 | | % 19 | 34 | |
| 5 | 2005 | | 11 | |
| | | | | .2004 |
| | | 590 | 2006 | |
| | %45 | | 549 | |
| 99.4 | 2005 | | | |
| | | | 2004 | 122.4 |
| | (2005-2001) | | | |
| 2000 | | | | |
| 159.5 | | | | 314 |
| | | | 2001 | |

45

177.3 .2005 49 2004
2006

170

2005

2004

7.8

2.8

8.2

2006

()

8

"

"

2006

⁸ . الاسكوا :سياسات جذب الاستثمار الأجنبي المباشر والبيئي في منطقة الاسكوا : تحسين مناخ الاستثمار الأجنبي المباشر وتعبئة المدخرات المحلية مع دراسة حالات الأردن والبحرين واليمن ، نيويورك 2003.

2005

218

| | | | |
|---------|----|------|---------------|
| (EIIAS) | | | Interregional |
| | | | 32 |
| | 66 | 2006 | 2004 |
| | | | ⁹ |

2-2-3. تطور الاستثمار في البلدان النامية

10

11

:

⁹ UNCTAD , Investment Provisions In Economic Integration Agreement , United Nations , New York and Geneva, 2006

¹ الاسكوا (2003) : سياسات جذب الاستثمار الأجنبي المباشر ، ص 8-9 .
² المصدر السابق.

| | | | |
|---------------|------|------|------------------|
| 2004 | 11 | 1986 | |
| %1 | | | |
| %22 | 2005 | | %3 ¹² |
| | | 2004 | %57 |
| 2005 | | | |
| | 17.2 | 30.7 | 2005 |
| | | | 14 |
| .%3 | | | |
| | | %87 | 2005 |
| | | .%29 | |
| | | | |
| | | 10.5 | 2005 |
| %21 | | | |
| Barclays Bank | | | 6.4 |
| | 5 | ABSA | |
| | | | %66 |

13 ملاحظة: لا تشمل بيانات الاستثمار الأجنبي المباشر كل من الاستثمارات العقارية والمالية. سحب بيانات الاستثمار الأجنبي المباشر للدول الأقل نمواً، الغلاف - X ، ص 19 – 22 ، اليمن ص ص 136-138 - ثم من ص 143-150. الاقتصاد الخليجي دولة من دول مجلس التعاون الخليجي تبدأ بالسعودية مع التركيز على الموازنة لعام 2007م

Green Field)

.(

CNOOC

ONGG VIDESH

PETRONAS

)

2005

%48

15 (

3-3. تطور الاستثمارات العربية المباشرة

(13)

2004

20

36.4

2005

| (13) | | | |
|---------------|-------|-------|--|
| () 2005 2004 | | | |
| % | 2005 | 2004 | |
| 43.6 | 12000 | 8359 | |
| 149.2 | 5376 | 2157 | |
| 138.3 | 4628 | 1942 | |
| 178.1 | 2933 | 1070 | |
| 35.5 | 2573 | 1899 | |
| 135.3 | 1532 | 651 | |
| 22.5 | 1469 | 1199 | |
| 22.6 | 1081 | 882 | |
| 21.3 | 1049 | 865 | |
| 22.4 | 782 | 639 | |
| 257.5 | 715 | 200 | |
| 81.8 | 500 | 275 | |
| 233.3 | 300 | 90 | |
| 361 | 261 | 354- | |
| 941.7 | 250 | 24 | |
| 2200 | 115 | 5 | |
| 69.6 | 23 | 39 | |
| | 1 | - | |
| 366- | 266- | 144 | |
| | - | - | |
| 81.1 | 36371 | 20083 | |

UNCTAD, World Investment Report 2006 :

2005

2004

2007

1.5

13

%40

14

2.8-1.4

3-3-1. تطور الاستثمارات العربية البينية المباشرة:

73,975)

74

(2005 - 1985)

(

%72.6

| جدول رقم (14) التدفقات التراكمية للاستثمارات العربية البينية الخاصة والمرخص لها وفق القطر المضيف خلال الفترة (2005-1985) (بالمليون دولار) | | |
|---|-------------------------------------|-----------|
| إجمالي التدفقات الداخلة خلال الفترة | إجمالي التدفقات المصدرة خلال الفترة | الدولة |
| 1,458 | 1,223 | الأردن |
| 3,753 | 38,806 | الإمارات |
| 869 | 1,884 | البحرين |
| 430 | 1,582 | تونس |
| 637 | 1,126 | الجزائر |
| 000 | 000 | جيبوتي |
| 43,103 | 8,405 | السعودية |
| 3,478 | 2,685 | السودان |
| 3,281 | 2,353 | سوريا |
| 000 | 000 | الصومال |
| 398 | 207 | العراق |
| 159 | 260 | عمان |
| 502 | 522 | فلسطين |
| 1,033 | 1,059 | قطر |
| 3,549 | 3,269 | الكويت |
| 4,495 | 3,714 | لبنان |
| 1,258 | 447 | ليبيا |
| 2,065 | 5,162 | مصر |
| 3,060 | 577 | المغرب |
| 2 | 9 | موريتانيا |
| 626 | 682 | اليمن |

المصدر: المؤسسة العربية لضمان الاستثمار، تقرير مناخ الاستثمار في الدول العربية 2005، جدول 12

(2005 - 1995)

38.8

%52.4

15

(8.405)

(5.162)

.(14)

¹³ - صحيفة الحياة اللندنية، 2004/10/12.

¹⁴ - جريدة عكاظ السعودية 2003/7/26.

¹⁵ - المؤسسة العربية لضمان الاستثمار، مناخ الاستثمار في الدول العربية 2005،

(1995 - 2005).
 64,795 (2005 - 1995)
 -1985) %87.6
 (2005 - 2002) .(2005
 2001 2.647 1995 1.430
 5,958 2002 2.912
 38,007 2005 2004
 .2004 %638
 .(14) 27,743 2005

جدول (15) الاستثمارات العربية البينية الخاصة والمرخص لها وفق القطر المضيف خلال الفترة (2005-1995) (بالمليون دولار)

| الدولة | الإجمالي خلال الفترة |
|----------|----------------------|
| الأردن | 518.3 |
| الإمارات | 2.359.7 |
| البحرين | 885.9 |
| تونس | 1.623.8 |
| الجزائر | 1.567.6 |
| السعودية | 31.837.2 |
| السودان | 6.102.2 |
| سوريا | 3.614.4 |
| عمان | 197.3 |
| فلسطين | 331.6 |
| قطر | 318.2 |
| لبنان | 6.524.6 |
| ليبيا | 8751.1 |
| مصر | 4.045.4 |
| المغرب | 3.215.8 |
| اليمن | 751.3 |

: المؤسسة العربية لضمان الاستثمار ،
 تقرير مناخ الاستثمار في الدول العربية 2005
 11

%58.2 (2005-1985)
 43.1

.(14)

2-3-3. تطور حجم الاستثمارات الخليجية المباشرة في الخارج وفي الدول

العربية

| | | | | |
|------|------|-------|------|------|
| 2006 | 2005 | 16 | 2004 | %85 |
| | | | | 34 |
| | 0.6 | | | |
| | | .2005 | 14 | 2004 |
| | | | | 17 |

| جدول (16) رصيد الاستثمارات الأجنبية المباشرة لدول مجلس التعاون الخليجي واليمن بين عامي 2000 و2005 (بالمليون دولار) | | | | |
|--|----------|--------|----------|--------|
| الدولة | عام 2005 | | عام 2000 | |
| | صادرة | واردة | صادرة | واردة |
| الإمارات | 10.087 | 28.168 | 819 | 1.061 |
| السعودية | 3.711 | 26.066 | 2.204 | 17.577 |
| البحرين | 5.058 | 8.276 | 1.752 | 5.906 |
| الكويت | 5.403 | 5.116 | 1.677 | 2.284 |
| قطر | 612 | 6.124 | 74 | 1.912 |
| عمان | 408 | 4.025 | 33 | 2.506 |
| اليمن | 9 | 983 | 00 | 1.336 |

المصدر: اليونكتاد تقرير الاستثمار العالمي 2006، ص 305، وإحصاءات الاستثمار الأجنبي للدول المعنية www.unctad.org/fdistastics

16
2005
2004
7

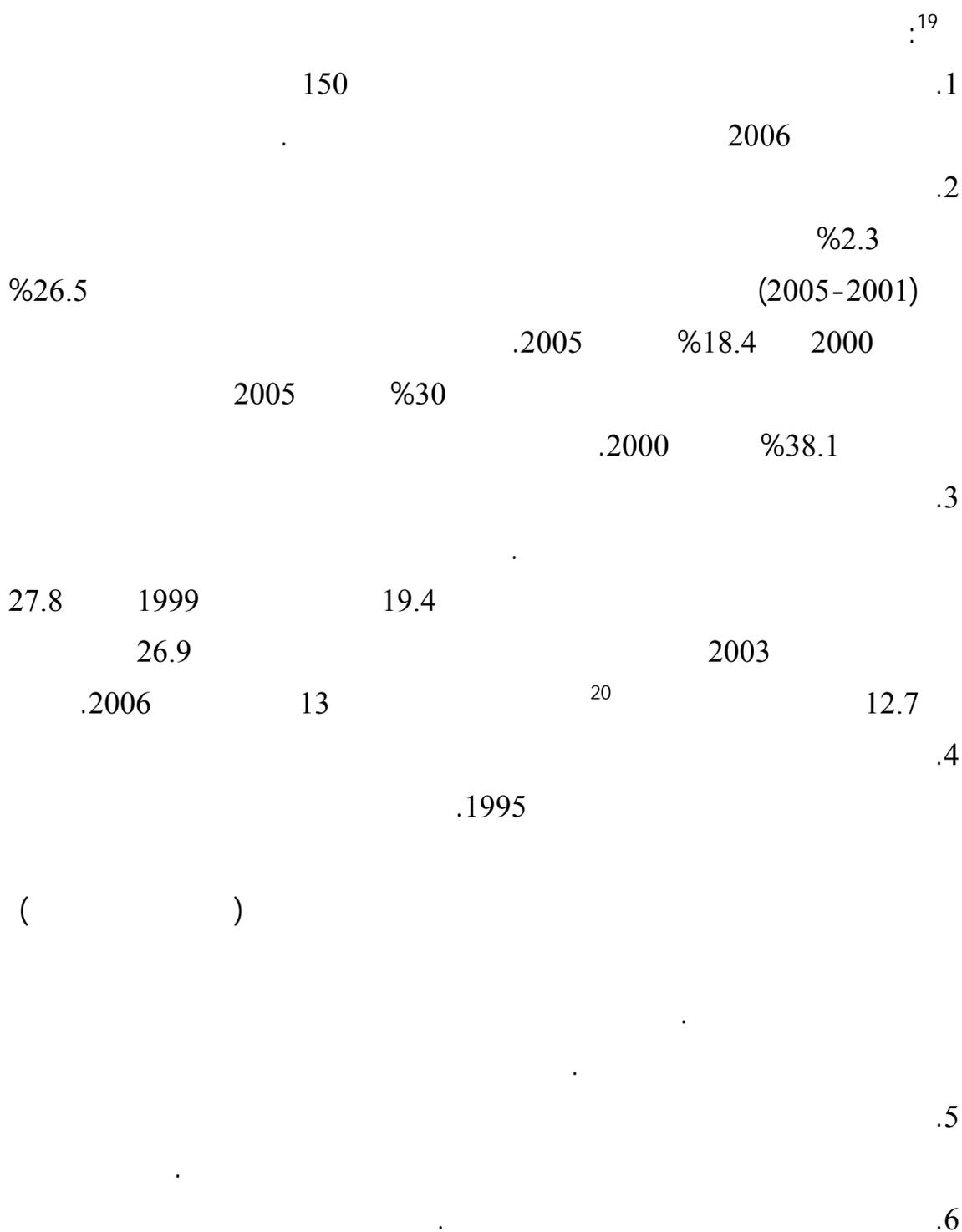
¹⁶ - تضم منطقة غرب آسيا إلى جانب دولتي إيران وتركيا، 12 دولة عربية تشمل دول مجلس التعاون الخليجي الست، والعراق، والأردن، لبنان، الأراضي الفلسطينية، سوريا واليمن.

¹⁷ للمزيد انظر UNCTAD, The World Investment Report 2006, united Nations, New York and Geneva, 2006 page 59-67.

| | | | |
|--------|--------------|-------------|-------------|
| | 8 | 2001 | |
| | .(2000-1997) | | (2005-2001) |
| | . | | %90 |
| | %88 | | . |
| 6,559 | | (2005-2000) | |
| | 2005 | 25,279 | 2000 |
| 10.1 | 2000 | (819) | 2005 |
| | .(16) | | |
| -1985) | 53,685 | | (2005 |
| | | (38,806 |) %72.3 |
| %6 | (%15.6 |) 8,405 | |
| | - | | %6.1 |
| | | | (14) |

4-3. تطور حجم الاستثمارات العربية والخليجية المباشرة في اليمن (1992-

2006)



¹⁹ - وزارة التخطيط والتعاون الدولي، ملخص خطة التنمية الاقتصادية والاجتماعية الثالثة للتخفيف من الفقر (2006-2010)، نوفمبر 2006.

²⁰ - البرنامج الإنمائي للأمم المتحدة، سياسات الاقتصاد الكلي للنمو وخلق فرص العمل، اليمن، ملخص تنفيذي، أكتوبر 2005، ص 7.

.7

.8

.9

.10

(1992-2005).

3-4-1. تطور حجم الاستثمار الأجنبي المباشر في اليمن

5,899

1.4

(1992 - 2006)

776.9

181.6

| (17) | | | | |
|-------------------|------|-------|-------|-------|
| () (2006 - 2000) | | | | |
| | | | | |
| 100.6 | 11.0 | 11.2 | 78.4 | 2000 |
| 11.1 | 0.1 | 0.5 | 10.5 | 2001 |
| 79.8 | 0.1 | 24.7 | 55.0 | 2002 |
| 84.9 | 12.0 | 23.2 | 49.7 | 2003 |
| 114.2 | 0.8 | 11.4 | 102.0 | 2004 |
| 66.2 | 0.6 | 39.0 | 26.6 | 2005 |
| 213.9 | 0.6 | 168.9 | 44.4 | *2006 |
| % | | | | |
| | 11.0 | 11.1 | 77.9 | 2000 |
| | 0.9 | 4.5 | 94.6 | 2001 |
| | 0.1 | 31 | 68.9 | 2002 |
| | 14.2 | 27.3 | 58.5 | 2003 |
| | 0.7 | 10.0 | 89.3 | 2004 |
| | 1.0 | 59 | 40 | 2005 |
| | 0.0 | 79 | 21 | 2006 |

2006/11/15 *

21

(1995-

(1999

(2004-2000)

6.4

135.5 2000

2001

21 - البنك المركزي اليمني، التطورات النقدية والمصرفية أكتوبر 2006، ص ص 22-23.

5.5 101.7 (2003-2002)
 144 2004
 .2005 302

 () 2006
 77
 (2005-2002) .(2000-1990)
 102
 2004 6 2002
 .(2005-2000) 144
 2005
 22

 5 2002 (22)

 22

 2002

 35,2 2003
 12,2 2004 2002 24,8
 169.5 2005 39.6
 2006

| | | | | |
|-------|-------|------|--------|-------------|
| 2003 | %41.5 | 2002 | %31.1 | (2004-2002) |
| .(17) | | | % 10.7 | 2004 |
| 2005 | | | %79 | %60 |
| (2006 | 15 |) | | 2006 |

2-4-3. تطور الاستثمارات العربية المباشرة في اليمن

| | | | | |
|-------------|---------------|---------------|------|-------|
| | 626.4 | (2005-1985) | | %0.85 |
| | | | | |
| | | ²³ | 461 | %73 |
| 682.2 | | | | |
| (2005-1985) | | | | |
| | | | | 55.8 |
| | | | | |
| | | (2005-1995) | | |
| %1.2 | | | | 751.3 |
| | ²⁴ | | 16 | |
| | | (2001-1995) | | |
| 1996 | | 86 | 2001 | 6.5 |
| (2001-1995) | | | | 222.8 |
| | | | | 31.8 |

²³ - المؤسسة العربية لضمان الاستثمار، مصدر سابق، جدول رقم 12 ص 219-228.

²⁴ - المؤسسة العربية لضمان الاستثمار، مصدر سابق، جدول رقم 11 ص 117.

528.5

(2005-2002)

132.1

2005

204

198

2005

147

57

3-4-3. تطور الاستثمارات الخليجية المباشرة في اليمن

جدول (18) التكلفة الاستثمارية بحسب نسبة المشاركة للمشاريع الاستثمارية الخليجية في المركز الرئيسي للهيئة العامة للاستثمار (1992-2006) بالمليون ريال يمني

| الدولة السنة | السعودية | الإمارات | الكويت | عمان | قطر | البحرين | الإجمالي |
|-------------------|----------|----------|--------|------|-----|---------|----------|
| 1992 | — | 38 | 95 | — | — | — | 133 |
| 1993 | — | 177 | — | — | — | — | 177 |
| 1994 | 1.644 | 17 | 638 | — | — | 19 | 2.318 |
| 1995 | 347 | 13.344 | — | — | — | — | 13.691 |
| 1996 | 439 | 7.068 | — | — | — | — | 7.507 |
| 1997 | 8.928 | 15.400 | — | — | 186 | — | 24.514 |
| 1998 | 2.154 | 821 | 11 | — | — | — | 2.986 |
| 1999 | 11.247 | 4.042 | 25 | 3 | — | — | 15.317 |
| 2000 | 3.688 | 95 | — | 240 | — | — | 4.023 |
| 2001 | 46 | 8 | 15 | — | — | — | 69 |
| 2002 | 21.854 | 506 | 428 | 43 | — | — | 22.831 |
| 2003 | 21.205 | 665 | — | — | — | — | 21.870 |
| 2004 | 186 | 5.182 | — | — | — | — | 5.368 |
| 2005 | 38.000 | — | 118 | — | — | — | 38.118 |
| *2006 | 182.466 | — | — | — | — | — | 182.466 |
| الإجمالي العام | 292.204 | 47.363 | 1.330 | 286 | 186 | 19 | 341.388 |

المصدر: الهيئة العامة للاستثمار، دائرة المعلومات والإحصاء.

* حتى 15 نوفمبر 2006

(2006-1992)
 (2001-1992)
 .(2006-2002)
 24,514 2001 69
 . 7,074 1997
 %20.7 70,735
 (18) .(2006-1992)
 .
 %79.3
 (2006-1992)
 . 54.100 270,700
 .2006 2005
 2006 2005 2004
 . 115
 %85.6
 (2001-1992) 292.2
 . 2,849
 (2006-2002) 52.748
 2006 .2004
 182.466
 % 53.4 %62.4
 .(2005-1992)
 (500)

| | | | | | |
|---------|--------|--------|--------|--------|-------------|
| | | | 24 | | |
| | | | %94.3 | | 275.472 |
| | | | 4.496 | | |
| 5) | | | 15 | | |
| | 5 | | | | (|
| | | | | | |
| 182.466 | | | | 7 | 2006 |
| 104.207 | | | | | |
| | 11.731 | | | 4 | |
| | | | 49.670 | | |
| '%95 | | | 13 | %100 | |
| | | | .%70 | %75 | 3 |
| | | | %13.9 | | |
| | | | | | |
| | 15.400 | 1994 | | 17 | (2006-1992) |
| 2005 | | | | | 1997 |
| | | 47,363 | | | .2006 |
| | 1997 | 1995 | | 3.158 | |
| | | 15.400 | | 13.331 | |
| | | | | | 1995 |
| | 1997 | .%99 | | | 13.207 |
| | | | | 4 | 6 |
| | | 10 | | | |
| | | | | | %40 |
| %80 | | %100 | | 3 | %100 %22.3 |
| | | | | | %88 |

| جدول (19) التوزيع القطاعي للاستثمارات السعودية بحسب التكلفة الاستثمارية (1992-2006) | | | | | | |
|---|-------|--------|--------|--------|---------|--|
| 1.629 | 1.875 | 16.703 | 24.605 | 49.670 | 180.991 | حجم استثمارات القطاع (بالمليون الريال) |
| 0.6 | 0.8 | 6.1 | 8.9 | 18 | 65.6 | % من إجمالي الاستثمارات السعودية |
| | | | | | | 2006 15 * |

1.330

.1994

638.1

286

186

19

4-4-3. التوزيع القطاعي للاستثمارات السعودية والإماراتية المباشرة في

اليمن

%65.6

13

4)

| جدول (20) التوزيع القطاعي للاستثمارات الإماراتية بحسب التكلفة ونسب المشاركة للفترة (1992-2006) | | |
|--|--------------------------------------|-------------|
| % من إجمالي الاستثمارات الإماراتية | حجم استثمارات القطاع (بالمليون ريال) | القطاع |
| 34.6 | 16.243 | العقارات |
| 20.5 | 9.591 | السياحة |
| 15.3 | 7.169 | الصناعة |
| 12.8 | 6.009 | الغاز |
| 8.5 | 3.988 | الصحة |
| 5.4 | 2.520 | الاتصالات |
| 1.7 | 790 | النقل البري |
| 1.2 | 573 | الأسماك |

%18

%8.9

%6.1

.%1.4

(19)

(170.947)

5.233

%34.6
%20.5
%15.3
%12.8
%8.5
%5.4
(20)

5-3. مؤتمر استكشاف فرص الاستثمار في اليمن

23-22

2007

1303

...

380

:

10- 5

100

()

.()

13
2.7

:

POT

POT

:

-
-
-
-
-

-1

-2

-3

-4

-5

-6

-7

قضايا اقتصادية

**1. الضريبة العامة على المبيعات في اليمن
(إشكالية التطبيق)**

1-1 مبررات تأجيل تطبيق قانون الضريبة العامة على المبيعات

1995

.1998

1999

2001

2001 (19)

(70) .2001

2002

2002 (36)
2004/1/1

2002
2001 (19) (70)

2001 (19)

"

"

2002

:

2003

2003

()

•

(19)

. 2001

•

(8)

2001 (19)

•

2001 (19)

2003/12/9

2004/1/1 2004/7/1 2001 (19)

2003 (42) 2003

2004/7/1

19

2004 (14)

2004

.2005

2001

19

: 2001

Republic of Yemen: Indirect Tax "

2002

." Policy and Revenue Administration Reforms

()

1991 (70) 2004 (14)

2004 •

2001 (19)

1991 (70)

2003 (42) 2002 (26)

(19)

2001

()

2003 2002

2004
GTZ

.2005

()

()

:

(1990-1972)

(1982 -1972)

•

(1986-1983)

1986

.(1996-1990)

•

•

11

15

1991

1994 6

2005

2005 (220)

2006

)

(

-

-:

-

| | | | |
|----|-----|----|---|
| | | %5 | - |
| | %3 | | |
| %8 | (+) | | |
| | %5 | | - |
| | | | - |

2-1. وجهة نظر مصلحة الضرائب

| | | |
|----|-----|-----------|
| | 130 | |
| | | % 70 |
| .. | % 5 | % 27 - 25 |

. %25
(2001)

.
%10

. 40 %25 %10 (%5)

.
% 10

.
130

.
40

%25

...

%10

2002

3-1. ملاحظات القطاع الخاص على قانون الضريبة العامة على المبيعات

2001 (19)

25-:

.1

(19)

.2

²⁵ الاتحاد العام للغرف التجارية والصناعية، " اثر تطبيق قانون ضريبة المبيعات وتعدد الرسوم اقتصادياً واجتماعياً، ورشة العمل الخاصة بالآثار الاقتصادية والاجتماعية لضريبة المبيعات، الأربعاء 14- ابريل -2004.
 الغرفة التجارية والصناعية بأمانة العاصمة، البيان الصادر عن الغرفة حول سريان تطبيق ضريبة المبيعات بدء من 1-7-2003.

.3
 %70
 %50
 2002
 (2002-1999) 382
 100 - 89
 (2000 -1996) 251 .4
 %5.5
 %15 -14
 %11.7 %10
 .%5 %3
 .5
 17 (4)
 .6

.7

()

()

.8

" "

.9

1995

.10

.2001 (19)

1999

2002

(19)

:

2002

()

.1

.2

:

-

-

-

-

-

-

4-1. أبرز التطورات خلال النصف الأول من عام 2007

2007

(FIAS)

1-4-1. إعداد دراسة حول آثار النظام الضريبي على النمو في اليمن:

(FIAS)

2007

(:) -
)

() -

(METR)

" "

(METR)

2-4-1. آلية تنفيذ قانون الضريبة العامة على المبيعات:

2006

2007

2007

.1

.2

.3

2008 2007

.4

21

.5

2007

2007

2008

| | |
|--|-------|
| | .6 |
| % 3 | .7 |
| . ²⁶ (2007/4/30 2006/12/15) | .8 |
| 21 | .9 |
| | .10 |
| 2007 | .2007 |
| | .11 |
| | .12 |
| 2001 19 | |
| | .13 |

²⁶ - أصدر وزير المالية في مطلع شهر ديسمبر 2006 تعميماً للدوائر الجمركية بالتوقف عن استيفاء الضريبة العامة على المبيعات اعتباراً من 2006/12/15 م.

اليمن في التقارير الدولية

1. وضع اليمن في مؤشر الحرية الاقتصادية 2007

خلفية تاريخية

1995 Economic Freedom
Heritage Foundation ()
Wall Street " "
Journal

(21)

2007

| الحريات العشر في تقرير 2007 (10 Freedoms) | العوامل العشرة في التقارير السابقة (10 Factors) |
|--|--|
| حرية الأعمال (Business Freedom) | التشريعات والإجراءات (Regulation) |
| حرية التجارة (Trade Freedom) | السياسة التجارية (Trade Policy) |
| الحرية المالية (Fiscal Freedom) | العبء المالي للحكومة (Fiscal Burden) |
| الحرية من الحكومة (Freedom from Government) | درجة تدخل الحكومة (Government Intervention) |
| الحرية النقدية (Monetary Freedom) 80% | السياسة النقدية (Monetary Policy) |
| الحرية النقدية (Monetary Freedom) 20% | مستوى الأجور والأسعار (Wages and Prices) |
| حرية الاستثمار (Investment Freedom) | الاستثمار الأجنبي (Foreign Investment) |
| حرية التمويل (Financial Freedom) | القطاع المصرفي والتمويل (Banking and Finance) |
| حقوق الملكية (Property Rights) | حقوق الملكية (Property Rights) |
| الحرية من الفساد (Freedom from Corruptions) | الأنشطة غير الرسمية (Informal Market) |
| حرية العمال (Labor Freedom) | مؤشر جديد |

المصدر: Heritage Organization: Economic Freedom Index 2007

2007

()

.....

2006

2004 2002 2000

2007

()

()

.(22) (21)

جدول رقم (22) مقارنة دليل مؤشر الحرية الاقتصادية في تقرير 2007 مع التقارير السابقة

| دليل 2007 | دليل التقارير السابقة | المؤشر |
|-----------|-----------------------|--|
| 80 - 100 | 1 - 1.95 | حرة (Free) |
| 70 - 79.9 | 2 - 2.95 | حرة في الغالب (Mostly Free) |
| 60 - 69.9 | NEW | حرية اقتصادية معتدلة (Moderately Free) |
| 50 - 59.9 | 3 - 3.95 | في الغالب غير حرة (Mostly UnFree) |
| 0 - 49.9 | 4 - 5 | حرية اقتصادية معدومة (Repressed) |

المصدر: Heritage Organization:2007 Economic Freedom Index 2007.

Doing Business 2007

2007

100

2. الحرية الاقتصادية على المستوى العالمي والعربي.

%82.8

%64

%49.6

%70.2

%52

%.41.2

%75.1

%62.3

%45.6

%62.8

6.8

%89.3

%85.7

()

(23).

جدول رقم (23) قائمة أعلى دول العالم في الحرية الاقتصادية

| الترتيب العالمي | درجة الحرية الاقتصادية | الدولة |
|-----------------|------------------------|------------------|
| 1 | 89.3 | هونج كونج |
| 2 | 85.7 | سنغافورة |
| 3 | 82.7 | استراليا |
| 4 | 82 | الولايات المتحدة |
| 5 | 81.6 | نيوزلندا |
| 6 | 81.6 | المملكة المتحدة |
| 7 | 81.3 | ايرلندا |
| 8 | 79.3 | لوكسمبورغ |
| 9 | 79.1 | سويسرا |
| 10 | 78.7 | كندا |

المصدر: Heritage Organization (Economic Freedom Index 2007)

20

12

45

(17)

%57.2

%.60.6

2007

%4.4 %3.0

%1.8

%0.2

جدول رقم (24) ترتيب الدول العربية في مؤشر الحرية الاقتصادية 2007

| درجة التغير عن تقرير عام 2006 | الترتيب العالمي | درجة الحرية الاقتصادية | الدولة* |
|-------------------------------|-----------------|------------------------|----------|
| 2.6- | 39 | 68.4 | البحرين |
| 0.2 | 53 | 64.0 | الأردن |
| 1.6 | 54 | 63.9 | عمان |
| 1.1 | 57 | 63.7 | الكويت |
| 1.8 | 69 | 61.0 | تونس |
| 0.3 | 72 | 60.7 | قطر |
| 0.7 | 74 | 60.4 | الإمارات |
| 1.8 | 77 | 60.3 | لبنان |
| 2.3- | 85 | 59.1 | السعودية |
| 4.4 | 96 | 57.4 | المغرب |
| 3.0 | 122 | 53.8 | اليمن |
| 1.0 | 127 | 53.2 | مصر |
| 1.1- | 134 | 52.2 | الجزائر |
| 2.3- | 142 | 48.2 | سوريا |
| 0.2 | 155 | 34.5 | ليبيا |

المصدر: Heritage Organization
(Economic Freedom Index 2007)
* على الرغم من أن التقرير قد أدرج كل من السودان والعراق إلا أنه لم تتوفر عنهما البيانات الكافية.

39

68.40

14

25

.2006

%29 .

%72

53

54

21

24

)

(

(24)

.2007

3. وضع اليمن في تقرير مؤشر الحرية الاقتصادية 2007:

122

2007

%53.8

2006

139

17

.2007

122

2006

| 2007 | | |
|-------|--|-----|
| (25) | | |
| %52.7 | | -1 |
| %56.4 | | -2 |
| %88.8 | | -3 |
| %65.1 | | -4 |
| %68.2 | | -5 |
| %50.0 | | -6 |
| %30.0 | | -7 |
| %30.0 | | -8 |
| %27.0 | | -9 |
| %69.7 | | -10 |

Heritage Organization: المصدر
(Economic Freedom Index 2007)

(Fiscal Freedom)

2007

حرية أداء الأعمال :

.(Doing Business)

- .1
- .2
- .3 (%)
- .4 (%)
- .5
- .6
- .7
- .8 ()
- .9 ()
- .10 ()

(4-1)

(7-5)

(10-8)

)

(

:

* 50 =

2007

%52.7

48

63

حرية التجارة:

()

:

.(NTBs)

-

-

(5/1)

:

-1

(-)

-2

(1) (2)

-3

(4)

-4

%56.4

2000 %11.8

%20

2005

الحرية المالية:

:

-1

-2

-3

%88.8

.%35

%20

%7.1

الحرية من الحكومة:

:

.(

)

-1

-2

.(

)

%65.1

%38.2

%2.5

الحرية النقدية:

2004,2005,2006

-1

-2

%11.9

.%68.2

(2005 - 2003)

%10

حرية الاستثمار:

%50

حرية التمويل:

%30

(4) 15

4

9

2005

()

)

(

2004

10

/

(0 - 100 %)

100%

إطار رقم (1) منهجية عامل حرية الاستثمار

: 0% - 100%

100% -1

90% -2

80% -3

70% -4

60% -5

50% -6

40% -7

30% -8

20% -9

10% -10

0% -11

0%

حرية حقوق الملكية:

%30

%100

%0

الحرية من الفساد:

152

(CPI)

.2006

%27

.2005

158

103

حرية العمال:

%69.7

()

2007

1995

: 2007

()

21

8

2007

100 0

•

•

•

•

While in other factors which make up the economic freedom index for the year 2007 , Yemen ranked 27% for the factor of freedom from corruption and 88.8% for the financial freedom which is the highest ever to be obtained by Yemen amongst the ten factors. In this index, when the percentage is lower, it means the level of economic freedom in the concerned country is lower.

of the role played by Arab and Gulf investment in Yemen during the period from 1992-2006, the report focused on the developments of such investment in details. It explains why such investment is significant for Yemen and focuses on the development of direct Gulf investment in Yemen and distribution in the various sectors.

By the end of 2006, Direct Gulf investment in Yemen was estimated at around 341.4 Billion Yemeni Rials. Saudi investment formed the largest share from the cost of Gulf investment at a percentage of 85.6% during the period from 1992-2006. Investment from the UAE is second at 13.9% of the total cost of investment for Gulf investment during the same period.

As Yemen is pursuing a line of integration in the world and regional economies by implementing a set of financial, fiscal and trade reforms, Yemen faced a number of problems between the private and public sectors regarding the implementation of The General Sales Tax law number 19 for the year 2001 since it was passed at the end of December of the same year showing the development of event since the passage of the law and highlighting the positions adopted by the Tax Authority and the private sector over this law. The report also highlights the major developments on the law and the tax system for the first half of the year 2007.

The report concludes by reviewing Yemen's position in the economic liberalization (freedom) index 2007 within the framework of Yemen's intellectual contribution to improve the investment climate and the business environment in Yemen inline with international standards. The economic liberalization (freedom) index has gained importance amongst donors, development lenders, international and regional organizations on top of which the Millennium Challenge Fund, and international firms and businessmen searching for investment opportunities or those looking to expand their businesses and industries.

Yemen ranked 122 amongst world countries in the economic freedom index 2007 progressing from number 139 in the 2006 report. This was the result of the new approach followed by the report in 2007. Yemen's good ranking in financial freedom and labor freedom factors which were introduced for the first time in the report for 2007. Amongst Arab states, Yemen ranked 11 out of 17 Arab states included in the report. Egypt, Algeria, Syria, and Libya were ahead of Yemen in this index while not sufficient information were available about Sudan and Iraq. On the other hand, Yemen came ahead of the six states of the GCC and Jordan, Tunisia, Lebanon and Morocco.

In the Arab World, unemployment was amongst the highest in the world. It's estimated that this averaged at 15.3% in 2005 equivalent to 15 million unemployed person. All Arab states suffer from unemployment in different degrees. Unemployment stood at 2.5% in the State of Qatar while 29.2% in Iraq and Somalia. Djibouti has 50% unemployment figures. In Yemen, rate of unemployment saw an upward trend rising from 11.5% in 1999 to 16.3% in 2004. This is an indication of the Yemeni economy's inability to generate sufficient work opportunities to absorb the number of new entrants to the labor market and the accumulated unemployment figures. According to the 2004 census, the number of unemployed persons stood at 689 thousand persons, most of them males. Youths form the majority of the unemployed constituting almost 53% if the total unemployed amongst males and females compared with 48.4% in 1999. The Third Five –Year Social and Economic Development and Poverty Reduction Plan (2006-2010) included a number of policies and actions designed to maintain the rate of unemployment at 12% by the end of the plan.

Foreign indirect investment form one of the striking globalization signs increasing in significances for developed as well as developing nations. Available data point out that total available investment is 916 billion dollars in 2005 that is a total increase of 29% in comparison with the previous year. It's expected to increase to 1.200 Billion Dollars in 2006. Multi-national companies are now playing a leading role in the global foreign investment flow either through mergers, acquisitions or take-overs in addition to new projects.

During the years 2005-2006, the advanced countries control over the biggest part of such direct investment flow continued. At the same time, investment flow reached the highest level in developing nations in 2005 reaching 334 Billion Dollars.

The report also focuses in details on the growth of the size of direct foreign investment in advanced countries and developing countries, as well as, development of investment in the Arab World which saw an increase of inward investment in 2005 by 36.4% compared with 20 Billion dollars for the previous year.

The report reviewed developments in direct inter-Arab investment during the past three decades, focusing specifically on the development of the size of investment by Gulf countries outside Arab states. These investment saw a sharp increase during he period from 2000-2005 to reach a balance from 6.6 billion to 25.3 billion dollars during the same period. Due to the significance

years, a matter, which has lead some to blame the recent price hikes to speculation in the prices of oil and minerals.

In the Arab states, economic growth averaged record levels reaching 6.5% versus 6% in the previous year despite the Israeli aggression on Lebanon and the siege imposed by the US and western nations on the Palestinian Territories following Hamas's victory in the Palestinian legislative elections in the beginning of 2006. This average is considered higher than the average world economic rate of growth.

Despite that, the performance of Arab economies was inconsistent from country to another. Qatar and Sudan realized the highest rates of growth. The six states of the Gulf Cooperation Council retained the same growth rate of 2006 while Lebanon and the Palestinian Territories archived a negative growth rate in 2006.

The year 2006 saw a relative increase in the rate of growth in tourism revenues in a number of Arab states. Jordan, Morocco, Tunisia and Djibouti , in particular, achieved higher growth rates in tourism revenues. While remittances by migrant workers to Arab states averaged 19.3 Billion US Dollars this year increasing by 9% over 2005. Morocco was the biggest recipient of such remittance. In contrast, official remittances from Saudi Arabia reached 15 Billion US Dollars and in the United Arab Emirates, remittances averaged from 12-15% of the total GDP of the country.

Due to the significance of employment and labor and the expansion of the negative impact of unemployment, economically, socially and politically, the report focuses on the development of employment and unemployment figures at both the regional and international levels and specifically in Arab states and Yemen. Total worldwide employment by the end of 2006 stood at 2.9 billion at an average growth rate of 16% in comparison with the previous year. The number of poor workers whose income is less than a dollar a day make-up 17% of the total number of employed persons. This rate rises to 47.4% amongst poor workers whose income is 2 dollars a day. The total number of employed women is estimated at 1,200 million women making up 40% of the total number of employed persons in 2006 worldwide. In comparison, unemployment figures were higher worldwide increasing by 500 thousand person. This is a record figure which has never been reached before putting the rate of unemployment at 6.3%. The positive rates of growth in employment in advanced countries contributed to the decrease in unemployment figures in 2006 which, in general, saw a downward trend of unemployment rates.

Summary

World GDP achieved a high rate of growth in 2006 reaching 5.4% compared with the previous year's rate of 4.9%. This confirms that the world economy's growth cycle, which started in 2006, is continuing. It is anticipated that such growth will continue during the years 2007-2008 due to anticipated continuation of economic revival in the euro zone and the continuity in strong growth in the merging economies, particularly the Chinese and the Indian economies which fueled the rapid growth in 2006. The continuity of growth in other developing nations is also anticipated to continue due to higher prices of raw material being exported by these countries and the sustain healthy fiscal positions which is contributing positively towards such growth.

In return, the economic growth of the United States of America has been relatively sustained in 2006 in comparison with the previous year. Such growth was affected by the sharp decline in housing prices and the retreat in investment on major firms and industrial plants. It's, however, anticipated that activities in the housing markets will continue to see a decline during the year 2007, a matter, which would lead to a declining economic growth of about 2.2%.

With the continuation of the world economic growth, accommodation of production capacity and surplus resources, the fear of increasing world rate of inflation escalated; especially, after inflation rates surpassed the comfortable rates indicators which were set up by central banks of advanced nations. As a result of the many measures adopted by these banks, and some of the central banks of emerging economies - India and Turkey, the world's inflation rate has remained almost fixed in comparison with the previous year. It rose slightly to reach 3.8% in comparison with the 3.7 % in 2005.

Declining world oil prices since mid- august of 2006, and the improvement in weather conditions during the second half of the same year, has played a role in keeping the world inflation at the same rate despite the escalating prices of oil and minerals and other non-oil products in general. Oil prices jumped into 76 USD per barrel in the beginning of August and mineral prices increased by 57% during the year while food prices rose by 10%.

The macro-economic indicators show that the constant price rise in oil prices in the world oil market during the period from 2004-2006 has not affected the economies which are dependent on the imports of oil; specifically, countries with advanced economies. Also, the rise in price of food and other agricultural products has not contributed to the rise of oil prices and minerals in recent