



# 廠商專訊

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### 中華全國工商聯 代表團訪港



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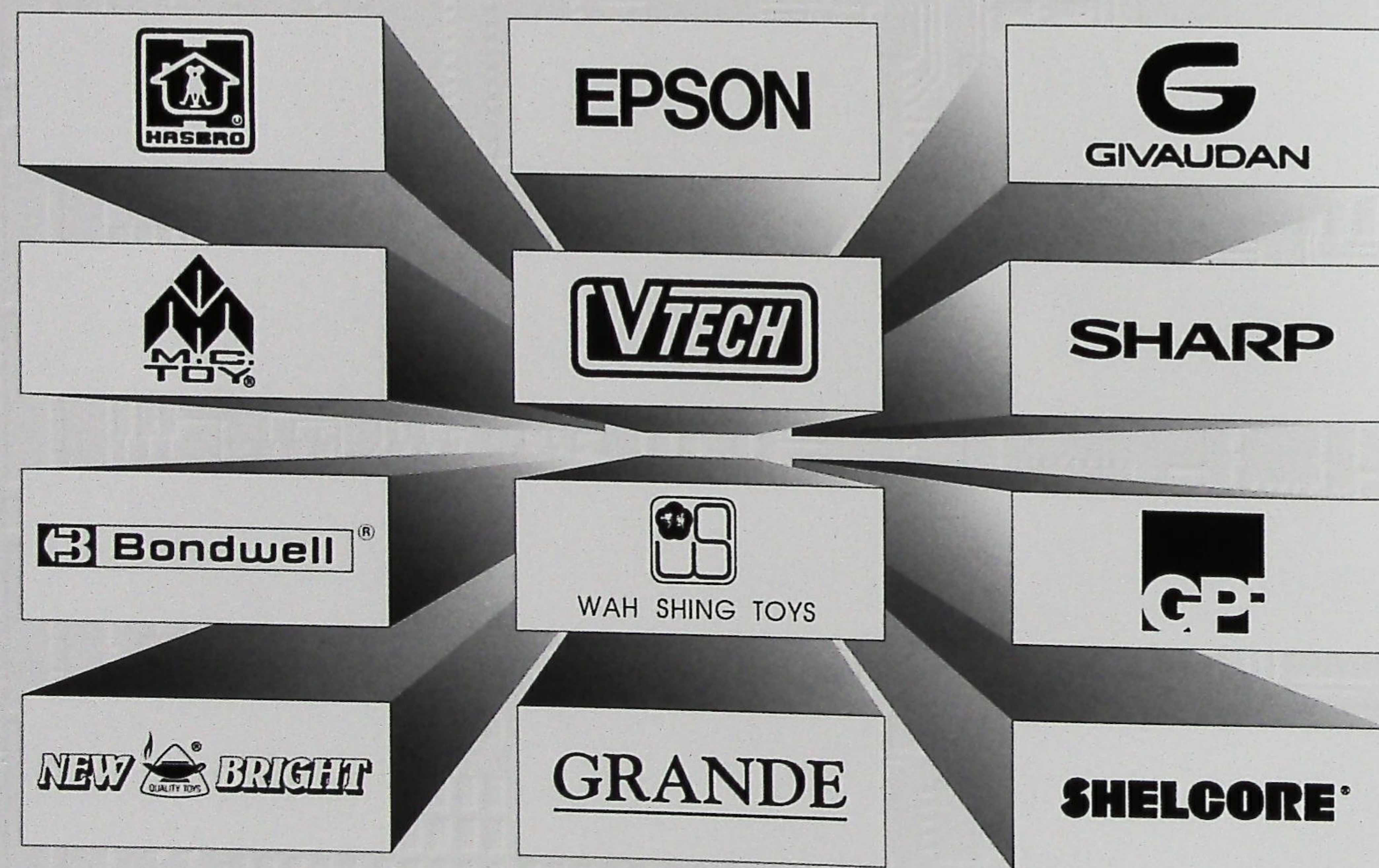


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# 中華全國工商聯代表團訪港

在去年十一月，本會曾組織高層代表團及貿易團赴北京訪問，以了解國內的經濟改革開放發展。該次訪問加強了本會與中華全國工商聯聯合會的聯繫。面對中國加快經濟改革的步伐以及中港工業合作的迅速發展，本會邀請中華全國工商聯聯合會於六月十五日至二十三日期間組團訪港，以實地考察香港經濟與工商業的最新發展，並與本會簽署合作備忘錄，以加強兩會的聯繫和合作。

中華全國工商聯聯合會代表團一行八人，於六月十五日抵港，代表團由該會副主席經叔平及梁尚立分別擔任正副團長，團員包括執行委員陳堅、顧問吳慧輝、研究室副主任胡甫昌、聯絡部處長彭凱及秘書黃嫻。

## 代表團蒞會訪問

在六月十六日的上午，代表團到本會訪問，由本會會長梁欽榮、副會長葉慶忠、名譽會長胡文瀚及司徒輝、常務會董魯廣雄、黃丙西、鄭正訓、楊木盛、劉雨亭及李世傑、以及會董蔡德河、梁中力、陳鴻基、周潤貴、柳子元、黃慶苗、林學甫、趙振邦、李漢忠、李仲潮、趙耀祖及周朝瑞接待。雙方就中國在經濟改革上的最新發展提出討論，並研究兩會進一步合作的方法，來促進兩地工貿發展。

經叔平指出鄧小平先生南巡的一番講話加快了改革開放，使思想解放開來，改革步子亦比以往大一些。經叔平說：「現在開放不單是在沿海地方，還要在沿江（即長江）及沿邊（即如黑龍江、內蒙、新疆、雲南及廣西等地）發展。此外，亦不單祇地區開放，行業方面也開放，例如最近的房地產市場和證券市場。」經叔平同時亦肯定香港對內地經濟發展的重要性。

在談及中華全國工商聯聯合會與本會簽署合作備忘錄時，經叔平希望透過備忘錄的簽署，可促進兩地的經濟合作



本會會長梁欽榮（中）、中華全國工商聯聯合會副主席經叔平（左）及本會執行幹事徐佩琴（右），在記者招待會上發佈有關簽署合作備忘錄的詳情。

及加快內地的經濟建設，並使香港保持繁榮穩定，順利過渡九七。他又表示中國已着重產品的質量，在質量改進方面盼能得到香港企業在經營及管理技術方面的幫助。

在回應經叔平講話時，梁欽榮申明香港廠商在遍及全國性的開放政策下，將會有更多投資合作的機會，而廠商會在這一時刻與中華全國工商聯聯合會簽署合作備忘錄是具有極其重要的意義。

梁欽榮又聲稱：「本港大部份的廠家與內地有緊密聯繫，過往主要是在生產方面的合作，然而在將來，隨着各行各業的開放，服務性行業、房地產市場和金融業的發展，廠家今後的營業方針不再局限於出口業務，而且可發展內銷市場，把合作範圍提升至工商業的新領域上。」

梁尚立隨後在介紹中華全國工商聯聯合會時指出，憑藉該會50多萬會員以及1,985個散佈全國的分支機構，再加上改革開放的精神，中華全國工商聯聯合會定能為香港廠商開展國內工商業聯繫方面的服務。「在現階段，中華全國工商聯聯合會其中一個主要任務是連繫三資企業、海外廠商朋友、國內私人及個

體企業等。」他又強調，國內領導有共同目標，就是堅定不移地執行開放政策，此外，亦肯定了香港同胞的愛國情懷，而國家在制定政策時，亦會尊重香港同胞的寶貴意見。

葉慶忠亦在會上發言，他認為國內的開放十分成功，中港在工業上的合作不再局限於來料加工及合作企業，而是擴大至更大型的投資，然而，在迅速發展的過程中，還有若干問題需要注意，例如廠商在國內實地設廠的規限、擴大國內內銷市場及協調香港企業管理技巧等。

胡文瀚表示安定的環境對發展企業及經濟尤為重要，在中國開放政策下，港商非常樂意往內地投資，希望中華全國工商聯聯合會能在这方面提供適當的協助，替港商反映意見。

最後司徒輝對國內進一步開放更多的地區大表歡迎。由於先進國家經濟發展在近幾年都不大理想，全球經濟的焦點都集中在東亞地區上，而中國在這時候加快開放步伐，發展股票市場、房地產市場及第三產業，其發展潛力及經濟效益將會極高，因此只要中港兩地配合發展，對兩地都有莫大裨益。

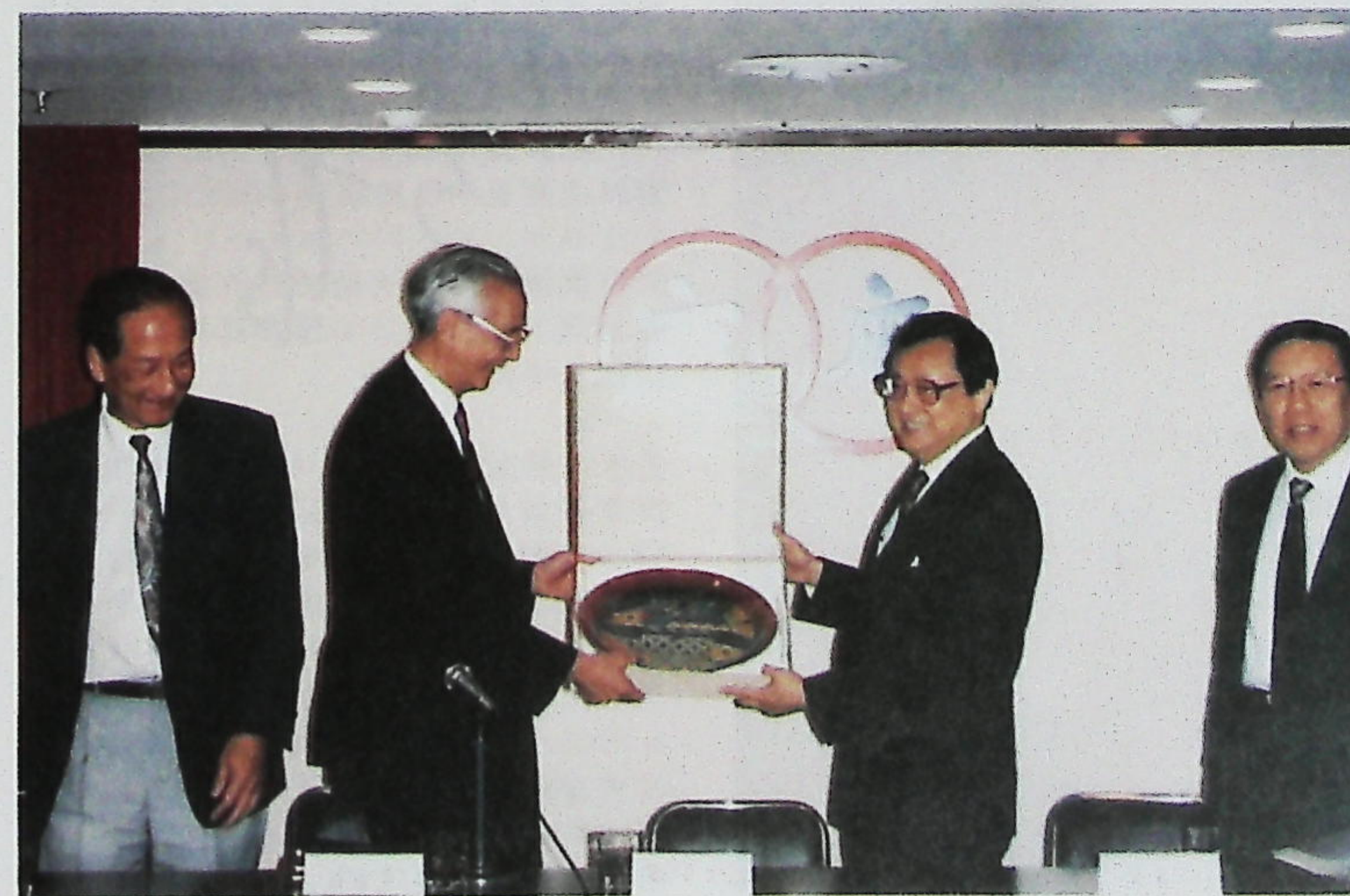
## 本會與工商聯簽署合作備忘錄

為加強本會與中華全國工商聯聯合會的合作及溝通，促進中港經貿發展，雙方於六月十七日假海港酒店舉行合作備忘錄簽署儀式，由梁欽榮及經叔平分別代表兩會簽署合作備忘錄。

梁欽榮在儀式上致辭時表示：「香港和中國在經濟開發和民生上有不可分割的關係，香港所擁有的融資及市場經驗，正是內地經濟改革開放最需要的，而中國充裕的資源及科研成果，亦是本港在工業轉型的階段所渴求的。在這些因素下，本港廠商與內地的經貿往來日趨繁多，中港的工貿合作機會亦不斷增長，故本會深信有必要加強與內地的聯繫。」

「中華全國工商聯聯合會與本會同是以推動工商業發展，促進經濟繁榮為宗旨的工商機構，兩會簽署合作備忘錄之目的，在於促進雙方在工貿訊息、工業技術及人才培訓方面的交流，從而將中港兩地的工業合作層次由過往於國內進行來料加工、集中勞工密集的形式轉向共同發展高資本、高科技生產的合作，使兩地工業發展得以配合，互補不足。」

在同一場合上，經叔平亦發表講話，他強調本會大部份的會員與內地有經貿合作關係，而這些交往合作對內地與香港的相互了解，加速兩地工商界的合作，從而保持香港的繁榮穩定，支援內地四化建設，起了積極而有效的作用。



廠商專訊一九九二年七月號 The Business Journal July 1992



本會與中華全國工商聯聯合會簽署合作備忘錄，以促進中港的經貿發展。

此外，經叔平又向與會者介紹中華全國工商聯聯合會的組織及未來工作路向。「中華全國工商聯聯合會是內地工商界組織的、全國性的人民團體。近年來，工商聯將工作重心轉移到做非公有制經濟成份方面的工作，吸收了一大批鄉鎮企業、三資企業、私營企業及個體工商戶作為會員。非公有制經濟是內地公有制經濟的有益補充，將在相當長的歷史時期內存在和發展。因此中華全國工商聯聯合會將在內地非公有制經濟的健康成長和發展方面作出積極的努力。」

同日並舉行記者招待會，發佈有關訊息。此外，本會亦同時設置酒會，以表示對代表團熱烈歡迎。出席者除梁欽榮外，尚包括本會副會長梁乃榮、葉慶

忠、陳永棋及周敏；名譽會長胡文瀚、黃保欣、司徒輝及倪少傑；常務會董洪克協、羅展、鄭正訓、楊木盛、劉雨亭、蔡衍濤及李世傑；會董曾金城、陳鴻基、楊孫西、周潤貴、黃慶苗、沈漢鎮、孫佐民、林學甫、李雨川、趙振邦、鄭帝倫、趙耀祖、周朝瑞、鄧易行、劉漢華及周林邦，小組主席方志強、曹金霖及嚴燦枝；以及會員曾文德、蔡法培及劉漢欽。應邀出席的嘉賓包括新華社香港分社副社長鄭華；工業署署長鮑明；各工商機構首腦和各國駐港使節。

中華全國工商聯聯合會代表團訪港期間，本會更另安排拜訪及參觀了新華社香港分社、香港中華總商會、香港總商會、香港工業總會、香港貿易發展局、香港生產力促進局、香港中華出口商會、中國企業協會、香港潮州商會、香港青年工業家協會、香港觀塘工商業聯合會、新界工商業總會、新界總商會、香港聯合交易所、現代貨櫃碼頭有限公司及廠商會檢定中心。透過一連串的拜訪及參觀，代表團更能了解香港的工商環境及各有關機構的日常運作，為日後的溝通及交流建立基礎。

代表團於六月二十三日離港返國。

中華全國工商聯聯合會副主席兼代表團團長經叔平（左二）致送紀念品予本會會長梁欽榮（右二）。旁為本會副會長葉慶忠（左）及中華全國工商聯聯合會副主席兼代表團副團長梁尚立（右）。



## 廠商會動態

### 本會赴台灣考察團

本會應台灣經濟部的邀請，於五月二十四日至二十七日組團赴台灣考察。考察團旨在探討台灣目前的經貿狀況及最新的科技發展，促進港台間的工商合作，並加強雙方的聯繫。

該考察團一行19人，由本會會長梁欽榮率領，副會長周敏及邵炎忠為副團長，其他團員包括常務會董魯廣雄、羅展及蔡衍濤；會董曾金城、李雨川、趙振邦及郭應道；小組主席曹金霖；會員孫紹九、張文英、萬景豐、陳相照、陳瑞盛及彭俊漢；執行幹事徐佩琴；以及助理秘書姜月燕。

在三天的訪問期間，考察團會晤行政院院長郝柏村、行政院大陸委員會主任委員黃昆輝、行政院大陸委員會副主任委員馬英九、經濟部部長蕭萬長、經濟部工業局副局長尹啟銘、台灣生產力中心副總經理張越長、台灣對外貿易發展協會會長鄒榮光、經濟部國際貿易局局長林義夫、經濟部投資業務處處長陳榮驤等。此外並訪問新竹的工業技術研究院，以了解台灣的最新產品及科技發展狀況。

考察團於訪台期間亦獲台灣工業總會熱情款待，該會理事長許勝發並設晚宴招待考察團團員。兩會更於五月二十七日舉辦一經貿座談會，與會者除考察團團員外，更有台灣工商界代表。

梁欽榮於會上指出，香港與台灣的貿易日益增加，目前香港乃台灣第二大



本會會長梁欽榮(中)率領考察團拜訪台灣經濟部，與該部部長蕭萬長(右)會面。旁為本會副會長周敏。



台灣工業總會理事長許勝發(右二)送贈紀念品予本會會長梁欽榮(左二)。旁為本會副會長周敏(左)及邵炎忠(右)。

出口市場，他估計在不久將來將高踞首位。

梁欽榮稱中、港、台三方在經貿貿易上應互相補充，緊密合作。

與會的台商亦有感以往港台商人缺乏溝通，希望雙方日後加強聯繫，互相借鏡及學習。

許勝發亦稱港台具有相似的經貿狀況及投資環境，且均從勞工密集生產轉往高科技發展。他希望以後能互相合作，使港台在亞太區擔當更具影響力的角色，並希望兩會能共同推動港台繁榮。

本會會長梁欽榮(右二)與中國生產力中心副會長張越長(左二)在會議上洽談。旁為本會副會長周敏(右)及邵炎忠(左)。

### 製造業為本港經濟中流砥柱

本會會長梁欽榮認為，製造業在未來的日子仍然是香港經濟的中流砥柱，並能與服務業相輔相成，攜手為香港的經濟再創高峰。

梁欽榮於五月二十二日應邀出席黃大仙廠商會第二屆委員會就職典禮並致辭。他指出本港的製造業仍具發展潛力，並呼籲政府與工業界全人攜手合作，為工業轉型作出努力。

他說：「面對現時的工業轉型期，我們有必要訂出一個長遠而又明確的發展路向，而政府亦應制定有關政策及提供全面的工業架構與輔助設施，並多與工業界磋商，聽取業內人士意見，令工業可以在適當的環境下轉型。」

論及本港製造業下一階段的發展，梁欽榮指出由於本港基本條件限制，製造業應運用本地或鄰近國家如中國近期的科技發展，在兩方面繼續努力。一方面是將科技應用在改良生產技術及效率，提高生產力、產品精確度及改善品質保證，以發揮更大的生產效益，增加本地產品增值比率。另一方面是將新科技應用到產品發展上，將本港的製造業多元化及轉向高檔層次，鞏固港製品在國際市場的地位。

他說：「落實從勞工密集走向科技密集模式，將是本港製造業未來努力的目標及發展路向。」

梁欽榮重申不同意一些有關本港製造業被服務行業取代或製造業開始式微及其對本港經濟重要性逐漸退減的言論。他稱統計數字雖然顯示本港從事製造業的僱員數目被服務行業所超越，但其實是因為香港廠商早已察覺到本地資源包括人力的局限性，故在七十年代末八十年代初藉着中國推行改革開放政策，就着手將一些勞工密集的生產工序北移。

梁欽榮說：「這實際上衝破了本港製造業繼續發展的客觀局限，充分利用了中國在進行經濟改革下向外開放的資源，本港製造業的潛力得以猛然倍增，支援製造業的各種服務行業亦因而突飛猛進。加上製造業部份工序已經北移，騰出足夠的人力發展服務行業，亞洲金融中心、中國窗口、世界貿易中心、亞洲及世界轉口港等美譽逐一得以確定。」

他說，香港廠商回內地投資設廠，除了引進資金、技術和管理知識外，並為內地同胞製造了不少工作機會，推動中國經濟發展。現時，香港廠商單在珠江三角洲就設廠近二萬家，僱有接近300萬名工人，單在一九九一年全年的投資金額達163億港元。此外，香港的投資亦已深入中國各地，現時全中國的外資其中三分二來自香港或經香港進行。最新統計數字顯示，在中國政府列為重點發展地區的上海，來自香港的投資已突破十億美元（約78億港元），佔當地外資總額四分之一，高踞首位。梁欽榮強調，中港關係特別在經濟領域發展至今日唇齒相依，互惠互利的地步，本港製造業實扮演了進入內地投資的先驅角色。

梁欽榮相信，踏入九十年代，本港廠商除了會繼續開拓本港以外有利的資源之外，亦會緊守本地製造業的崗位，抓緊發展機會。據政府統計處發表的數字顯示，九一年首三季的本港製造業產量，按工業生產指數計算，較九〇年同期增加1%；九一年的出口總值有2%增長；而九一年留銷入口資本貨物增長，以實質計算，約為20%。梁欽榮說這些數字正好證明製造商繼續注重在本地發展的決心，而不是逐步從本港經濟中引退。

### 會長於政協委員會會議上致辭

本會會長梁欽榮應香港地區廣東省政協委員會的邀請，於五月十二日出席該委員會的每月會議，發表演說。

會議上，梁欽榮講述本會向美國政府游說無條件延續中國最惠國地位所作出的努力，並進一步表示中港兩地持續的經濟合作對確保香港未來的發展極其重要。

### 電器用品調查問題獲解決

美國在去年按特別三〇一條款展開調查後，繼而公佈了一份被選作報復目標的中國製產品名單，當中括入大部份的電器用品。本會因此協助一群在中國生產電器用品的製造商組成專責委員會，共謀對策。此外並聘請法律顧問進行磋商。專責委員會除了向美國貿易代表辦事處提交函件外，還遠赴華盛頓出席聽證會，表達有關困難及對香港造成的可能影響。事件最後由中美雙方達成和解協議而告終。

為表謝意，專責委員會邀請本會會長梁欽榮及多位行政人員於五月二十八日出席午宴聚餐。席上，專責委員會主席汪穗中致送紀念品予梁欽榮，以答謝本會的襄助及支持。

### 深圳代表團

在深圳市人民政府經濟協作辦公室副主任余榮光的率領下，一個十人代表團於六月十二日蒞會訪問，由本會副會長葉慶忠接待。該代表團團員為各省市政府駐深圳辦事處代表。

會議上，各團員分別介紹所屬省市最新的經濟發展。葉慶忠向代表團表示，本會將組團到中國各處尋求貿易及投資機會。



本會副會長葉慶忠(前排右三)接待由深圳市人民政府經濟協作辦公室副主任余榮光(前中)率領的代表團。



## 河北區代表團

天津市河北區人民政府區長史曉成率領一個七人代表團，於六月二日蒞會訪問，由本會會長梁欽榮接待。

史曉成表示，此行目的在於與本港製造商建立連繫，尋求合作機會。梁欽榮謂本會將盡量提供可能的協助，以加強中港企業的合作，並會把有關投資計劃的資料公告各會員。

## 中國青年鄉鎮企業家協會訪港團

中國青年鄉鎮企業家協會名譽會長洛桑率領一個20人訪港團，於五月十四日到訪本會，由本會常務會董羅展、呂明華及李世奕、會董黃桂；以及會員周岳接待。

會議上，洛桑介紹中國青年鄉鎮企業家協會的背景及結構。訪港團此行目的是透過本會與港商建立更緊密的連繫，加強中港之間的經濟合作。

## 旺角辦事處喬遷

本會旺角辦事處最近遷往新址，於六月九日舉行正式開幕剪綵儀式。

梁欽榮在儀式上致辭時闡釋，本會擴充旺角辦事處的目的，是配合該區對本會服務特別是簽證服務日益增長的需求。辦事處盡量提供一個舒適的環境及便利的地點，讓各會員及客戶使用本會簽證服務。

梁欽榮指出本會過去數年所簽發的



本會會長梁欽榮(右三)接待天津市河北區代表團，並送贈紀念錦旗予代表團團長、天津市河北區人民政府區長史曉成(左三)。

產地來源證數目均持續增長，其中以旺角辦事處的簽證數目居冠，佔本會簽證總數的大部份，而其去年較前年的增幅更超越一倍以上；所以本會非常重視旺角辦事處的工作，希望藉着新辦事處搬遷，能夠提供更有效率及友善的服務。現時，本會簽證辦事處遍佈主要工商業區，包括中環、旺角、尖沙咀、尖東、觀塘及荃灣，方便各界人士申辦本會簽證服務，而本會會員更可獲特惠收費優待。

同時，他透露本會特別成立了檢定中心及產地來源證業務推廣小組，該小組的工作目標是加強宣傳本會現時所提供的服務，包括鼓勵會員採用本會簽證及測試服務，並就改善及提高服務提出建議，以提供更有效率及友善的服務。

出席開幕典禮的嘉賓除梁欽榮外，尚有本會副會長梁乃榮及葉慶忠、各督會長司徒輝及雷康侯；常務會董羅展、黃丙西、楊木盛及蔡衍濤；會董梁中力、曾金城、陳鴻基、黃慶苗、洗漢鎮、林學甫、李雨川、李仲潮、趙耀祖、周朝瑞及劉漢華；以及小組主席鄺友德及嚴燦枝。



會長梁欽榮在廠商會蔡章閣職業先修中學第七屆畢業典禮上致辭。

## 廠商會蔡章閣職業先修中學畢業典禮

廠商會蔡章閣職業先修中學於六月二日舉行第七屆畢業典禮，本會會長梁欽榮擔任主禮嘉賓，席上並致辭及頒發證書。

梁欽榮表示，要使香港工業升級及順利轉型，首要的工作重點是培訓技術人才。他說：「工業是香港經濟的基礎。本港工業正由勞工密集模式轉型至科技及資本密集模式，工業必須有技術的支持，並投資以提供更佳的人才培訓。」他強調現時本港工業所需的不單是體力勞動工人，而且還需要那些具備技術、技能及專業知識的各階層工人。他稱本會今後的發展，加強人才培訓將是其中重要工作之一。

梁欽榮透露蔡章閣職業先修中學將於下學年開辦中六預科課程，對該校學生來說不但可學習到一些工商科目的實用技巧，為投身工商行業作好充分準備，還能像一般文法中學的學生一樣，選擇升讀大學，出路絕不比一般文法學校學生狹窄。他並呼籲政府增加職業先修中學的數目，使其與一般文法中學的比例接近。

最後，梁欽榮又勸勉畢業同學憑着在校學到的熟練技巧和專業知識投身工業界，摒除藍領比白領地位低的不健康心態，視工業為畢生事業，為本港工業升級邁向高科技發展作出貢獻。

出席廠商會蔡章閣職業先修中學第七屆畢業典禮除會長梁欽榮外，尚有名譽會長洪祥佩及司徒輝；該校署理校長蔡宏豪；常務會董羅展、黃丙西及楊木盛；會董梁中力、柳子元、黃慶苗、林學甫、劉漢華及周林邦；小組主席嚴燦枝；以及會員曾民裕及劉漢欽。

## 廠商會職業先修中學週年球類比賽

廠商會職業先修中學於五月十四日假香港灣仔灣道室內運動場，舉行週年球類比賽，賽後並邀得本會會董林學甫主持頒獎。當日出席的嘉賓除該校校監尹德勝和校董鄭正訓外，尚有本會會長梁欽榮；副會長周敏；常務會董黃丙西及楊木盛；會董曾金城、孫佐民、鄭帝倫、劉漢華及周林邦；以及小組主席嚴燦枝。



本會會長梁欽榮(中)、常務會董及會董以及香港中華廠商聯合會職業先修中學校董會全人攝於該校週年球類比賽頒獎禮。

## 香港稅務訓練課程

本會於五月二十日至二十二日舉辦一項分為三個內容組別的香港稅務訓練課程。六名來自容永道會計師事務所的稅務專業人士被邀作課程的講者，向參加者闡釋香港稅務的原則、架構及執行以及中國稅務的概覽。他們包括事務所合夥人黃汝璞；以及稅務經理鍾維國、沈稚波、胡慶坤、黃煜全、伍釗常及袁世傑。

訓練課程的目的是向需從事財務管理的東主經理及初中級管理階層提供機會，藉以了解本港稅務制度及原則，訂出完善的簿記系統／紀錄及財務計劃，並且認識在國內投資的稅務問題。

第一組別先由袁世傑集中講述香港稅務法例及執行，其中包括介紹稅務條例、稅務規則及執行指引、稅務局的架

構以及進行稅務反對／延緩暫繳稅／上訴的程序。繼由伍釗常講述物業稅及印花稅，以及有關薪俸稅的福利待遇／退休金計劃／公積金。

第二組別的重點是商業稅務，黃煜全着重講論利得稅，以及折舊免稅額及可扣減稅額的支出的使用。此外，鍾維國進一步解釋利潤的來源及決定來源的原則、各類型收入，以及有關申報海外收益的有效稅務計劃。

第三組別可說是訓練課程的高潮。胡慶坤解釋實地審核及稅務調查的目的



及程序，以及違反稅務條例的刑罰。另一方面，鑑於在國內投資是一熱門項目，故沈稚波闡釋香港稅務對國內各種形式的業務經營所構成的影響，這些形式包括「在中國分包加工及裝嵌工作，而廠房則為中方所有及管理」、「按合作協議在中國分包工作」、「合股式合資經營製造」及「合資經營物業發展」。此外，沈稚波解釋香港稅務對出入口的影響，以及使利潤可被視為源自香港以外地方，而毋需課稅的一些安排。至於中國的稅務，黃汝璞介紹公司所得稅、個人所得稅、非居民所得稅及工商業綜合稅。她還提醒參加者，稅務政策及各稅項的評估方法會隨着不同的經濟特區而各異。

該課程參加情況踴躍，反應熱烈。

本會主辦的香港稅務訓練課程參加情況踴躍。



# 會員廣告 優惠計劃

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### 勞資消息

#### 改善僱傭條例

一九九二年僱傭（修訂）（第四號）條例草案已在憲報公佈並提交立法局審議，條例草案內提出若干改善，以確保僱員不會在不公平情況下喪失其應得的遣散費及長期服務金。

該條例草案規定如僱員遭解僱是由於僱主已將或擬將該僱員受僱場所由港島遷往九龍或新界或由九龍或新界遷往港島，這不能再視作因裁員而解僱。但是，倘若僱主搬遷營業場所而對僱員造成極大困難，而該等困難按習慣法足以構成實質上的解僱情況，又或倘若僱員沒有固定的受僱場所，而被解僱的主要原因是僱主對該僱員擔當的工作需求減縮，該僱員可享有遣散費。

該條例草案亦訂明若僱員因僱主的過失而終止合約時，無論曾否給予離職通知或代通知金，仍可享受遣散費。條例草案亦擬擴大僱傭條例條款的適用範圍，將被解僱前的開工不足、無薪病假，或無薪分娩假期一起計算遣散費及長期服務金。因此，它適用於任何因健康理由或年老而自動離職的僱員，或在任職期內死亡的僱員。

此外，該條例草案亦澄清僱傭條例內其他一些條款，以確保僱主在終止僱傭契約時，不需要給予同一僱員雙重利益。任何僱主支付的離職酬金或退休金，應可與其支付給僱員的遣散費或長期服務金互相抵銷，而僱主應從支付予僱員的退休金中相應扣除需支付的遣散費或長期服務金數額，或作出相反的扣除。條例草案亦規定倘若退休金及長期服務金的受益人不相同，退休金的受益人只可領取扣除長期服務金後的餘額。故此，除了該餘額外，受益人須把退休金退還予有關退休保障計劃的受託人，

而該受託人則應把該款項付還有關僱主。為免僱主在勞資審裁處裁定須支付遣散費予僱員後延遲支付有關款項，該條例草案擬要求勞資審裁處以後指定支付遣散費的期限。遇勞資審裁處未有指定付款期限，僱主應在法官裁定須支付遣散費後的14日內支付該款項予僱員。

#### 改善僱員補償

為保障工人在僱員賠償方面之利益及簡化處理小額賠償的程序，當局在一九九二年僱員補償（修訂）條例草案及九二年僱員補償（修訂）（第二號）條例草案中提出改善，並已於五月在憲報公佈及提交立法局審議。

九二年僱員補償（修訂）條例草案擴大僱員補償條例的保障範圍及澄清條例內一些含糊不清的地方，並擴大條例內有關「僱員」及「親屬」的定義。

條例草案亦擴大保障範圍至部份時間工作的家庭傭工，使他們在因工受傷時亦可獲得賠償。僱主亦需為這些部份時間工作家庭傭工投購勞工保險，以承擔其應負的賠償責任。

此外，該條例草案亦建議將法例內「親屬」的定義重新釐訂，除包括僱員死亡時的親屬外，亦包括將來需依靠其生活的親屬，因此新的定義會包括死亡僱員的遺腹子，以及在其死亡後一年內退休而以後需靠其供養的父母、祖父母及繼父母。

條例草案亦建議將僱員補償條例的保障範圍，擴展至受僱於外地僱主及在海外工作的本港僱員，惟需在有關僱主同意將工傷個案交由本港法庭處理的情況下始適用。

另一項建議修訂為撤銷在未能就賠償作最後決定前，僱主可預支予受傷僱員的28,000港元上限，這項修訂可鼓勵僱主預支更多款項給有困難的僱員。

條例草案又建議賦予普通評估委員會權力去評估僱員永久傷殘程度，並決定受傷僱員必需有的休息期，這項修訂會有助勞工處評估賠償款額。

其他修訂包括當已被評估賠償的僱員舊傷復發而出現某程度永久性傷殘時，勞工處處長可視情況需要取消其較早前作出的賠償評估，以及將該僱員轉介往普通評估委員會驗傷。該條例草案不單澄清列於評定補償證明書內的簽發日期，還申明按僱員補償條例取得的賠款可被扣除以支付應繳的法律援助費用。此外並重新調整上述條例內各罪行的最高罰款額，確保相同嚴重程度的罪行所得的懲罰亦相同。

九二年僱員補償（修訂）（第二號）條例草案建議僱主可就不超過七日的暫時喪失工作能力與受傷僱員協議賠償款額。新的協議賠償程序將可免卻受傷僱員申請賠償的麻煩，同時亦可使有關僱主更快從保險公司取回已支付予僱員的賠償。

該條例草案亦規定僱主需向勞工處呈報有關工傷意外及雙方協議的賠償款額，在某些情況下，該處會檢討或取消有關的協議。

該條例草案亦建議將呈報非死亡意外的期限由目前的七日延長至14日，以配合實施新的解決賠償程序。

#### 失業統計數字

政府統計處發表的最新勞動人口統計數字顯示，勞工市場近數月有舒緩跡象。

一九九二年一月至三月經季節性調整的失業率為2.4%，去年同期為1.8%，而九一年十月至十二月亦為1.8%。

九二年一月至三月根據首次求職者數目的變動而作出調整的失業人數估計為65,700人，去年同期為49,900人，而九一年十月至十二月則為51,900人。

	九二年 一月至三月	九一年 十月至十二月	九一年 一月至三月
失業率	2.4%	1.8%	1.8%
失業人數	65,700	51,900	49,900



廠商專訊一九九二年七月號 The Business Journal July 1992



## 工業概況

### 香港塑膠業研究

本專訊於上期概述《一九九〇／一九九一香港塑膠業技術經濟及市場調查研究》報告發表的整體塑膠業調查結果及結論，今期將繼續介紹按重要工業環節進行的調查結果及結論、國際競爭力分析及報告的整體建議。

該報告的編製是按工序或功能將本地塑膠業劃分為若干重要工業環節，分別予以分析（表一）。

### 國際競爭力

報告分析了塑膠業的國際競爭力，建議根據市場的各項競爭基礎，指出香港可在哪些市場佔優越位置，供工業署考慮如何為香港訂立各種未來部署策略時參考之用。

報告指出，由於香港在過去數十年已建立實力，加上積極把業務轉往中國以維持低成本生產，因此玩具及洋娃娃市場是香港唯一佔優勢的市場。它建議發展更高增值的產品如富教育意義或電子玩具。

此外，香港所佔位置高於一般的有傢具、家庭用具及電器組件市場，原因是這個組別的產品較易出口，而又毋須在顧客的工廠附近進行本地生產。然而，報告預測香港在傢具市場的位置會下降，主要原因是現時在西歐和北美各主要市場，很多傢具產品都是以再造樹脂如聚丙烯製成，目的在於為再造樹脂提供出路。

香港位列一般的市場包括康樂／體育用品、器具、行李箱袋和電訊零件。這個組別需要高度人手裝配，對市場的趨勢、短促的產品壽命周期和創新／發展期所出現的轉變，迅速作出反應，且更須靈活應變，配合顧客的要求。另一方面，行李箱袋市場大概是香港位置已滑落／下跌的市場，同時由於很多工資低廉的國家帶來競爭壓力，這個趨勢將會繼續。

工業／建造業設備及包裝產品市場均只錄得低於一般的位置。這兩個市場的產品很難經濟地遠程運送出口或用船付運。然而，倘能把食物包裝技術與一種在華南地區種植而佔農產品出口優勢的特別農產品揉合，那麼包裝產品市場的情況會有所改善。商業機器市場的位置亦低於一般，原因是很多顧客要求組

重要工業環節	調查結果	挑戰
混合及分銷	舖租／倉租成本上升 顧客遷往中國	
非電動玩具	非熟練勞工短缺 亞太區出現成本競爭 生產工序差不多全部遷往中國	維持低成本生產 發展較高價值的有牌子／專利玩具
電動及電子玩具	生產／裝配工序大量遷往中國進行	轉移較先進的加工技術 維持成本競爭力 設立本身的專用標籤或有牌子的產品系列
包裝	非以出口為主的大型重要工業環節可將生產繼續留在本港進行	可採用的改進措施包括不透性樹脂、共擠塑、聚對苯二甲酸乙二醇酯樹脂再造、表面處理、取向薄膜及共注塑技術
家庭用具	買家的影響力不大 裝配的密集程度及所用的塑膠類別差異很大	設計及發展各式各樣的新產品 繼續提高其產品的設計技術及對國際市場的了解
電器組件	很多公司既是本身所需塑膠組件的大製造商，又是消費電器（塑膠）產品的製造商 大量使用較高值塑膠 大部份勞工密集的裝配工作在中國進行，電器及機械組件的精密注塑工作多在本港進行	發展技術更先進及產品質素更穩定的製模業 需要更大量具各方面技能的熟練技術勞工 發展具本身標籤或牌子設計的產品（採用ISO 9000品質標準）
工業及建築產品	中國為最大的市場 很多公司正研究將廠房遷往中國	了解當地建築守則的規定 加強價格／成本的競爭能力
模具製造	熟練製模工人的僱用成本上漲／供應下降 業務開始轉往中國 廠商在技術及品質水平方面極為參差	將簡單的模具設計及製造轉往勞工成本較低的中國進行 提高餘下香港製模商的最起碼及整體質素及可靠程度
設備製造	業務以香港為主 設備以品質及精密程度來看被視為「中價市場產品」	改良硬件／設備的整體品質水平及精密程度 選擇性地透過中國來維持低成本生產

表一：九個重要工業環節的調查結果及挑戰

件製造在本地市場進行，或在他們設於本地的工廠進行。香港可透過提高設計技巧，改善這個市場的地位。

報告顯示，運輸產品市場是香港唯一佔差劣位置的環節。由於很多製件體積龐大，若用船運，不符合經濟原則，故製造汽車塑膠製件並不適合香港。

### 建議

報告為業界提出多項建議，業內廠商必須從三個主要策略方案中選擇其一，它們是依然集中於現時的業務、採用／學習新技術以求更高增值成份，以及選定合適的業務以免受到廣泛的競爭威脅。在這些策略方案中，報告建議第二項為基本攻勢。

循此方向，報告提議香港政府應推行一項技術支援計劃，以改善業內廠商（特別是小廠商）的技術水平／技能。

報告亦擬議香港政府統計處應重新制定塑膠業的資料搜集程序，令政府及業內人士對發展趨勢有更透徹的了解。

由於香港公司大多面對技術勞工短缺的問題，故此報告建議僱用那些在中國受訓的工程師，以及在香港給予他們培訓。

此外，報告建議香港模具協會應設立制度，評估本地製模商的能力及品質水平，目的是在個別基礎上，監察及改善香港製模商的表現。

就勞工方面的另一項建議，是政府應更注重本港大學的技術設計與發展技能，為塑膠業培訓未來的工程師，使業界能轉向更高的增值水平。

為了強調設計與創新，報告建議政府在內部採取措施，並與其他政府合作，以加強現行的產品設計註冊與保障

制度，鼓勵較長遠的創新工作。

報告亦提議工業署應成立一個監督委員會，研究及改善各輔助機構的工作配合，為業界提供更多服務。

再者，報告建議業界應採納ISO 9000品質標準，尤其是在產品方面，例如塑膠電動／電子產品，俾能循高增值及產品精密度的方向發展。

### 復康職業用具基金

復康職業用具基金全由香港公益金撥款資助，並由香港復康會負責管理，為有興趣僱用傷殘人士的僱主提供財政資助或技術性指導。

許多傷殘人士都曾經接受各行業或專業的訓練，先進的科技已經可以讓盲人能夠閱讀及書寫，或下肢傷殘的人士亦可以運用純手部操作的機器。該基金提供特別設計的儀器及工具，去幫助傷殘人士閱讀、書寫、操縱機器、量度計算以及解決行動上各種困難。

基金在以下範疇為僱主提供協助：

## 城市規劃／基本設施

### 規劃署新訊息

首份《規劃署通訊》已於三月出版。這份刊物的目的是提供一額外的途徑，以便把該署現時的工作進度公告大眾市民，俾讓進一步了解制定規劃政策及作出規劃準備的程序。該通訊可供市民免費索閱。

據通訊指出，當局目前正對全港地域發展策略進行全面檢討，評估擬議港口及機場發展，並現行環境及運輸政策所帶來的影響。檢討亦會把珠江三角洲一帶近期發展以至香港在其中角色的轉變，納入考慮之列。完成檢討後，當局會因應本港長遠的發展需要，特別是人口分佈、就業及經濟活動，訂下所需基建的架構。此外亦會就房屋、工商業及辦公室等制定分區土地用途政策，為未來發展提供指引。

同時，該署亦正對港口及機場發展策略中的港口部份作首次檢討，分為兩期進行。第一階段已於一九九一年中完成，包括更新對港口需求的預測，並予以轉化為所需的港口設施；第二階段是

一、技術性指導：一班專業顧問會幫助僱主找出他們的需要，並提供可行的選擇。

二、購買儀器：申請一經批准，基金即會替僱主購買所需儀器，並借予他們的公司供傷殘僱員使用。

三、改裝樓宇及機器：如果僱主需要改裝樓宇或機器，基金會替他們進行改裝或建議他們如何改裝。

該基金的服務是免費的，僱有傷殘人士的僱主可借用儀器，以供傷殘僱員使用。

僱主倘欲作出申請或查詢，可與展能就業科，或與香港薄扶林沙灣徑7號香港復康會（電話817 6277）聯絡。

### 資深專業服務

源自德國的資深專業服務是一個非牟利機構，在與國際間的合作下，策動德國退休專業人士投入國內外自願性活動。資深專業活動包括多方面的工作，

主要是在技術及經濟方面提供快捷而有實效的支援服務，集中給予專業人士及管理階層教學及訓練，以及指引他們如何自行運作，一般並配以實際解決問題的方法。

申請要求提供有關服務者均需經評核，評定準則包括合作發展目的、技術轉移程度以及涉及的訓練範圍。要獲得該等服務，東道國有否在經濟發展上作出貢獻的意圖是決定性一環。

申請獲處理的先決條件，是清楚界定所需工作及指明其任命目標。資深專業服務的顧客以任命國家的中小型企業及機構為優先對象。

獲任命的資深專業人士年齡以不超過70歲為限，而工作平均為期兩個月，但不多過六個月。雖然他們是義務性質工作，但公司亦須負擔工作成本，包括在任命國家的費用（膳宿、交通及按日津貼）、旅費，以及在德國內準備及處理工作的費用。

會員倘對該項服務有興趣，可致電542 8600內線620與本會助理秘書林建業聯絡。



修改港口發展計劃，預期會於九二年中完成。

為了把都市設計得更完善，該署亦預備着手多項規劃研究，包括特別管制全面檢討、九龍及新九龍的建築物密度及高度限制檢討、大嶼山北部發展研究、大嶼山港口半島發展研究、西九龍填海工程、中環及灣仔填海工程，地下商業設施發展伸延至私人用地以外研究，以及郊外活動地區研究。

至於分區規劃方面，其中一個主要的策略是都會計劃選定的策略。該署正擬備一份有關發展西九龍及荃灣一葵青的報告書，以便為解決各區的「舊有核心地帶」內的用地、運輸及環境問題，提供行動的根據。當局並於九二年四、五月間計劃着手有關發展東南九龍的報告書，其中包括啟德機場原址的重新發展。此外亦正擬備新界西北及西南部發展策略，可望分別在九二年八月及年底完成。



## 經濟消息

### 九一年第四季工業生產

根據政府統計處發表的《工業生產按季指數報告》顯示，一九九一年第四季的工業生產指數為134，較九〇年同期上升0.8%。由於受季節性因素所影響，九一年第四季的指數較第三季上升1.5%。

以九一年整年來說，與九〇年比較，主要工業組別中的紙類製品和印刷的生產量大幅上升10.4%，接着是紡織（包括針織）工業，增幅為4.3%。

另一方面，主要工業組別中的化學製品、橡膠製品、塑膠製品及非金屬礦產產品的生產量下降5.6%，而衣着（不包括針織品及鞋類）的跌幅則為3.6%。

九一年第四季主要工業組別中的紙類製品和印刷以及紡織（包括針織）工業的生產量亦顯著上升，與九〇年同季比較，增幅分別為11.3%及9.5%。

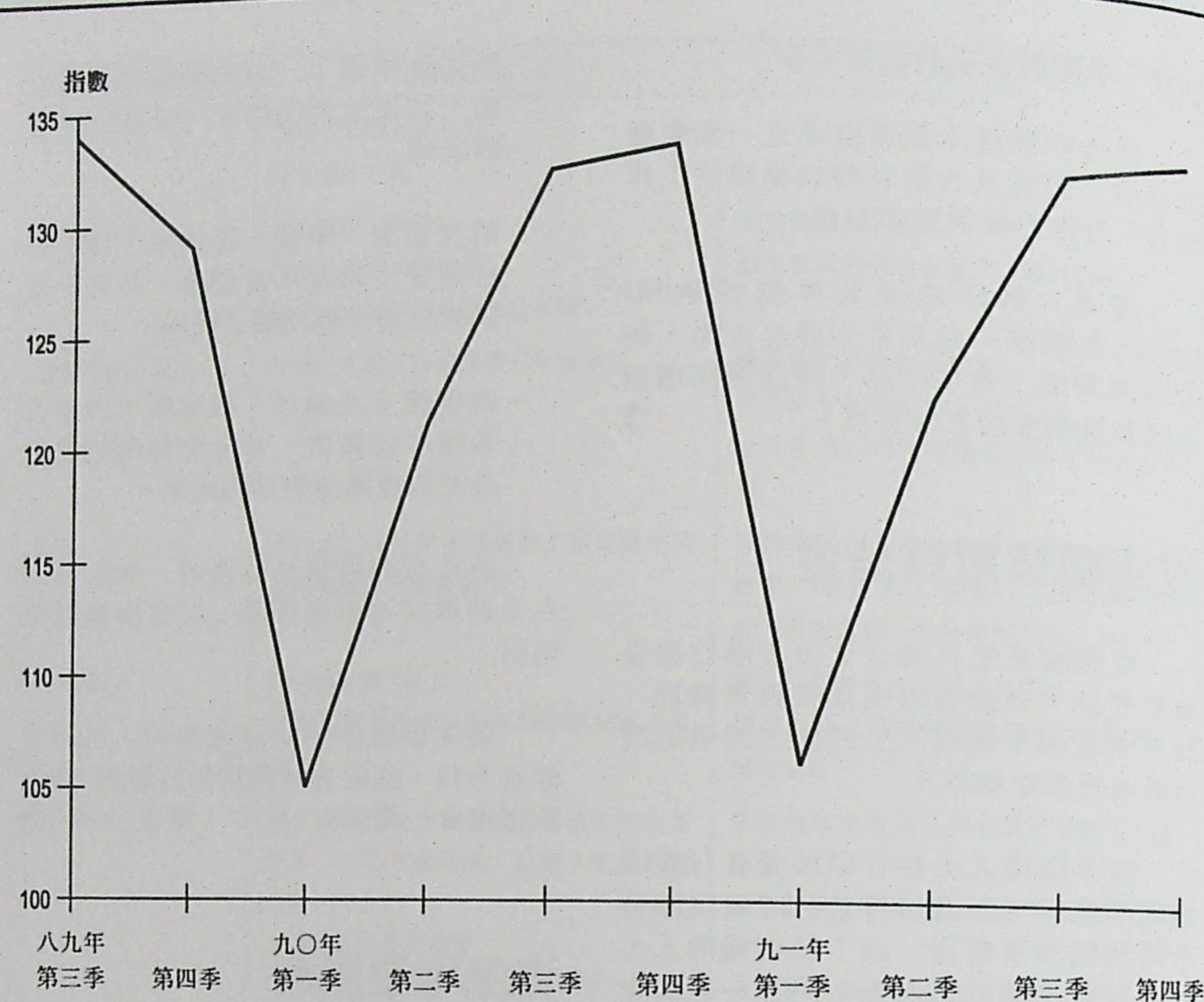
另一方面，生產量顯著下降的工業則有衣着（不包括針織品及鞋類）工業及主要工業組別中的電器及電子用具、專業及光學儀器，分別下降8.1%及2.5%。

制定工業生產指數的主要目的是反映以實質計，本地生產量隨着時間變動的情形。

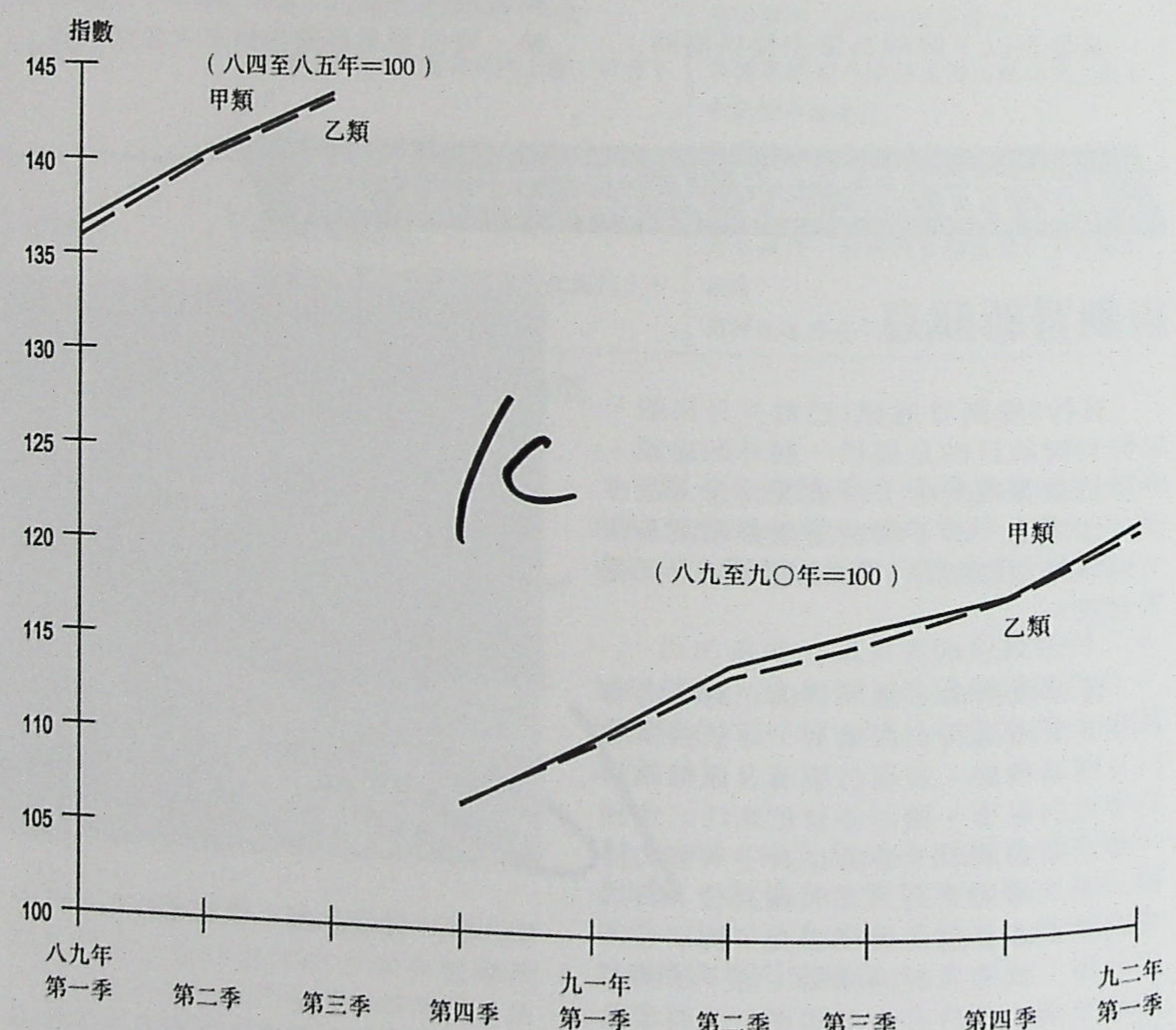
### 第一季消費物價指數

以一九八九至九〇年為基期的九二年第一季甲類及乙類消費物價指數平均分別為121.3及120.8，較九一年第四季分別上升3.1%及2.7%。

糧食項目的甲類及乙類指數比九一年第四季分別顯著上升4.7%及4.4%，這主要是由於在農曆新年前後期間，新鮮蔬菜、新鮮海產、鮮果、豬肉及家禽價格上升，以及酒樓及其他食肆用膳收費增加所致。同時，因液體石油氣的價格上漲，加上電力及煤氣最近均增加收費，故燃油及電力項目的甲類及乙類指數分別上升3.2%及3.1%。此外，一些私人樓宇及房屋委員會屋邨的租金上漲，致使住屋項目的甲類及乙類指數分別溫和上升2.9%及3.0%。其他呈現升幅的項目包括煙酒、服務、交通、耐用物品及雜項物品。



所有製造工業生產按季指數 (八六年=100)



消費物價指數

另一方面，衣服項目的甲類及乙類指數分別下降2.1%及2.7%，主要原因是許多百貨公司及時裝店在該季舉行大減價，以致外衣價格較低所致。

消費物價指數是用以衡量通貨膨脹率，反映大眾消費及開支模式，並可作為薪金調整、價格增漲方面等多項事務的參考。

## 支持工業教育 請捐助廠商會獎學金

# 廠商會獎學金計劃

廠商會獎學金計劃創立於一九六四年，目的為鼓勵在學青年投身工業，以增加發展工業的人力資源。每年籌集所得獎學金，均以捐款人或廠商會名義，頒贈各專上學院及工業學校成績優異學生。近年本港工業教育不斷擴展，工業學校及學生人數年有遞增，因此本會須不斷擴大獎學金計劃，以增加受獎名額，並惠及新開辦的工業院校。為貫徹支持工業教育的精神，獎學金計劃極需要你的捐款，敬請將下列捐款表格填妥，連同支票寄回本會（地址：香港中環干諾道中64號廠商會大廈三樓香港中華廠商聯合會）。如有查詢，請聯絡本會助理秘書劉尉倫小姐542 8600內線633。

一九九二年獎學金受獎學校如下：

香港大學	觀塘工業學院	鄧肇堅維多利亞工業學校	基協工業中學
香港中文大學	葵涌工業學院	何東官立工業女中學	基新工業中學
香港科技大學	黃克競工業學院	香港仔工業學校	筲箕灣工業中學
香港理工學院	李惠利工業學院	荃灣官立工業中學	中華基督教會扶輪職業先修學校
香港城市理工學院	沙田工業學院	龍翔官立工業中學	香港中華廠商聯合會職業先修中學
香港浸會學院	屯門工業學院	鄧鏡波學校	廠商會蔡章閣職業先修中學
摩利臣山工業學院	柴灣工業學院	九龍工業中學	香港布廠商會朱石麟職業先修中學

AIM

### 一九九二年廠商會獎學金認捐表格

公司名稱：（中文）  
（英文）

地址：（英文）

電話：

本公司捐贈獎學金詳情如下：

- ☐ 由會方代為分配捐款  
港幣（元）
- ☐ 指定受獎學校捐款  
（請參閱上列學校名表）

受獎學校名稱*	獎學金名稱*	獎學金名額	每名金額	合共港幣（元）

- \* 捐款金額最低為HK\$500。
- \* 指定捐贈專上學院每名獎金不少於HK\$2,500，其他學校每名不少於HK\$500。
- \* 如無指定獎學金名稱者，將統一以「廠商會獎學金」名義頒發。

捐款請以劃線支票支付「廠商會工業發展信託基金」(Chinese Manufacturers' Association Industrial Development Trust)。根據稅務條例，捐贈本會工業發展信託基金之款項可憑收條申請免稅，本會收到認捐款項後，即發出收據。

該收據抬頭應為

負責人簽署：

（姓名）：

日期：

據編號及日期

（本會填寫）



## 環境問題

### 化學廢物管制規例

廢物處理（上訴委員會）規例、廢物處理（表格及收費）規例及廢物處理（化學廢物）（一般）規例已在五月生效。首項規例規定向根據廢物處理條例成立的上訴委員會提出上訴所須依循的程序及使用的表格，而次項規例則根據廢物處理條例申請領取或換領廢物收集牌照或廢物處理牌照的表格，以及該等牌照的收費。

廢物處理（化學廢物）（一般）規例對將廢物如何界定為化學廢物，以及控制和管理化學廢物的產生、擁有、貯存及處理等一般事宜，作出規定。根據

規例，任何人士除非已向環境保護署登記，否則將不可製造或引致化學廢物產生。

至於處理的方法，規例規定化學廢物在收集及處置前應予以正確裝載、標籤和妥為貯存。尤其是，化學廢物應移交一接收站處理；如產生化學廢物的地點或樓宇已領有廢物處理牌照，則可於該等地點或樓宇處理。除了其他法定規則外，規例亦要求化學廢物須包裝穩妥，不同種類的化學廢物不可混合、包裝或貯存在同一個器皿內，並須確保器皿沒有缺口。此外，在運送化學廢物時，每次均須持有「運載紀錄」，作監察及記錄用途，這些紀錄尤其須記載有關生產、收集、運送、接收、轉運及出入口化學廢物的細節或資料。規例亦只許領有牌照的廢物收集者運載化學廢

物，而處理及處置化學廢物（包括加工及循環再用）應在領有牌照的設施內進行。

除了前述規定，亦有條文是關於防止危害公眾衛生及污染的措施，以及有關該規例所定準則的豁免、使用的表格、提供虛假資料的罪行及該規例規定可以提出的免責辯護。

凡不按照該規例任何規定辦理，一經定罪可被判罰款及／或監禁。會員應查詢與廢物有關的資料或進行化驗，以鑑定化學品所產生的廢物性質，並參考環境保護署編印的《化學廢物產生者登記指引》，以查核有關的廢物是否列為化學廢物。環境保護署任何辦事處均備有該指引及登記表格，以供索閱。

## 貿易概況

### 台灣：進口紡織品及成衣的來源證規定

貿易署接獲通知，謂由一九九二年六月十五日起，台灣的紡織品及成衣產品產地來源證規定的範圍已擴大至全部來源國家。

按照經修訂的規定，由即時起，由香港進口的上述貨品必須領備貿易署或任何一所政府核准的來源證發證機構（包括本會）所簽發的產地來源證。

查詢有關規定，可致電398 5447與貿易署柳美蘭小姐聯絡。有關來源證服務詳情，請致電542 8600內線602向本會助理秘書歐陽汝發查詢。

### 全球商業機會會議

由大阪商工會議所舉辦的一九九二年全球商業機會會議，將於十月十九日至二十二日在大阪舉行。

與會者可參加商業配對計劃，海外與日本公司獲安排互就貿易、投資、合營企業及技術合夥等方面，進行業務討論。香港公司可設置攤位介紹業務。此外，商家亦可參加研討會及研習班，以便取得未來業務趨勢及機會的最新資料。會上並舉辦有關工業的討論會，讓來自世界各地的同業參與者，提出共同關注的事項作討論。

會員倘欲取得有關進一步資料，可致電542 8600內線620與本會助理秘書林建業聯絡。

### 香港電腦研討會

由香港電腦學會舉辦的一九九二年度香港電腦研討會已於五月十二日舉行。經濟司陳方安生應邀主持開幕典禮及致辭。

是次研討會的主題為「資訊科技——是一種工具、負擔還是挑戰？」香港上海匯豐銀行執行董事（銀行服務）施德倫作專題演講，他是一位在本港資訊科技工業方面富經驗的專業人士。

在過去13年，該研討會逐漸被認為本港資訊科技的論壇，有助促進有關發展；每年均獲來自政府、私營機構及專上學院等600多名代表的支持。

### 旅遊業統計數字回顧

香港旅遊協會最近出版《一九九一年旅遊業統計數字回顧》，現以每本100港元公開發售。

該年刊由香港旅遊協會研究部製作，詳列到港旅客、遊客特徵、旅遊業收入、酒店入住率、有關航空公司的統計及香港居民往外地旅遊等比較數字。

倘有查詢或訂購，請致電801 7389與該協會研究部聯絡。



會長梁欽榮（中）主持第三屆亞洲工業博覽會剪綵儀式。

## 投資國家

### 洪都拉斯

洪都拉斯位於邁阿密西南約1,000哩，人口接近500萬，其中10%居住在首都特古希加爾巴，另外亦有10%居於工業正有實質增長的聖佩德羅蘇拉區。當地人操西班牙語，而英語則被廣泛應用作第二語言。洪都拉斯擁有穩定的民主政府，積極鼓勵海外投資。

### 作為海外生產基地

洪都拉斯擁有充足的技術勞工，工資相宜。特別的技術及職業課程，加上在職訓練，令到該國在加勒比海一帶成為勞動生產力最高的國家。大部份的管理階層都曾到海外大學留學，確保能掌握雙語，並有效地揉合本土及國際商業慣例。當地的資產租金率及電費皆是美國加勒比海盤地行動計劃的國家中最低的，樓宇租金為每月每平方呎0.25美元（約1.95港元），而電費則是每千瓦小時0.4至0.6美元（約3.12至4.68港元）。根據令人鼓舞的政府政策，海外投資可獲免稅期，而私營銀行更可提供財政資助，附帶要求寬大。另外，該國擁有中美洲最優良的港口設施及精密的電訊系統，可與世界許多城市連繫。

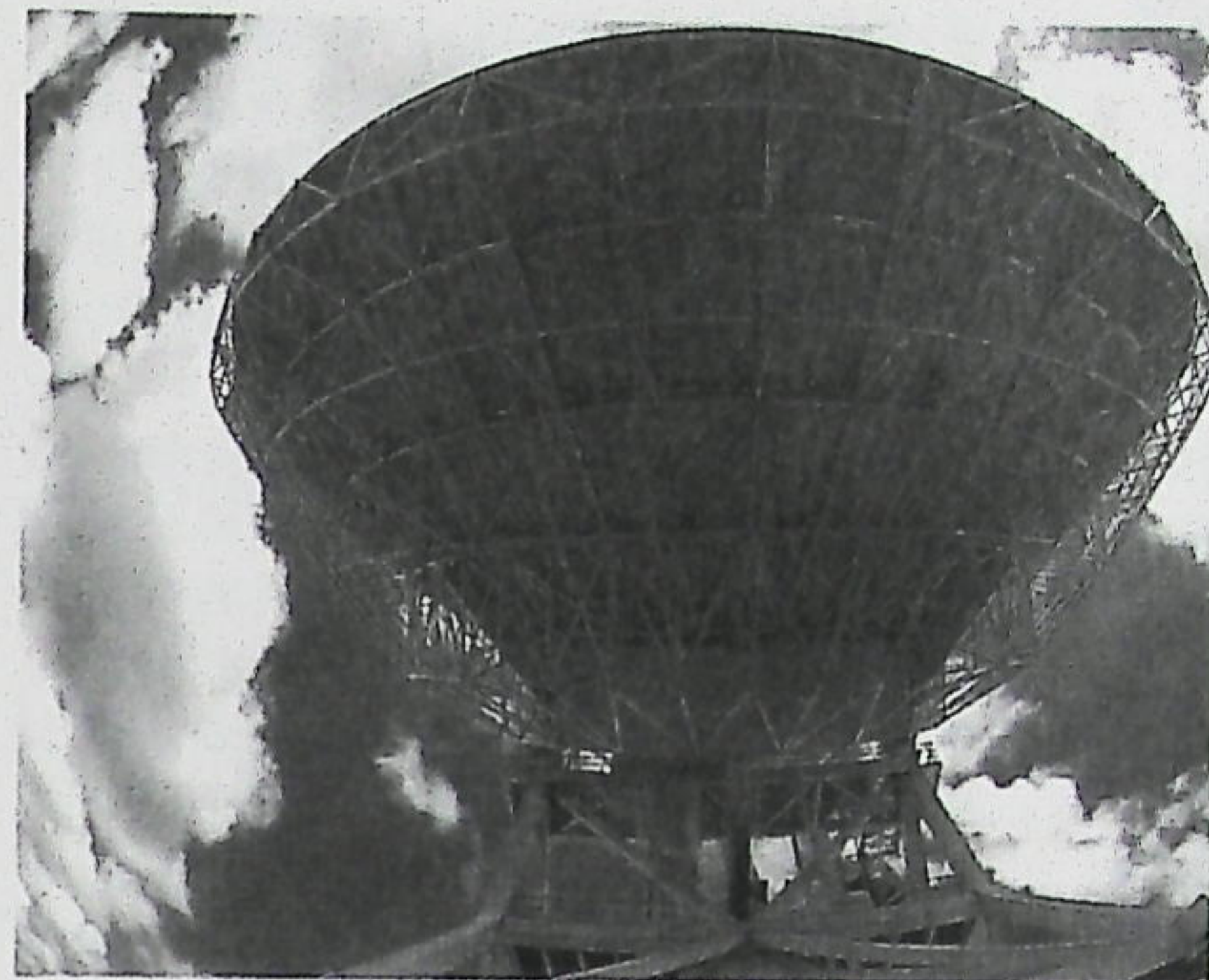
### 充滿發展動力的行業

由於與美國市有緊密的連繫，洪都拉斯得以享有不少有利的貿易條款，因此製造業大有發展餘地，特別是在成衣、鞋類、醫藥、電子及傢俬等行業方面。洪都拉斯駐有美國一些最成功的成衣製造商，生產名牌時裝、襯衣、運動服裝及便服。由於有廉價及具經驗的勞工、穩固的管理基礎以及輪美配額遠較當地現時的產量為多，故成衣業仍大有可為。

### 新的工業領域

#### 自由貿易區

為了支持工業區不斷的發展，政府劃分了六個城市作為自由貿易區，它們都是鄰近最大工業城市聖佩德羅蘇拉的拉塞瓦、特拉、喬洛馬、科爾特斯港、奧莫阿及阿馬帕拉。個別人士可在那六個任何一個城市內興建樓宇，並取得自由區的待遇，但樓宇必須完全由柵欄隔開，有24小時保安及由洪都拉斯港務局監管。在自由貿易區內經營的公司，一切生產所需機械設備、辦公室用具、原料及零件，均可免稅進出口。此外不徵收聯邦、州或地方所得稅、銷售稅或公



洪都拉斯先進的通訊設備對工商業發展非常有利。

司稅，並容許把所有貨幣調回本國。

自由貿易區內工廠大樓的出租面積由2,400至二萬平方呎，水、電及通訊設施完善，並提供保安、廢物收集、清潔服務、法律服務及內部海關服務。

自由貿易區內投資的其他優惠包括：

- 一、貨幣兌換不受限制；
- 二、簡化進出口付運清關手續，盡量少用文件，在一天之內完成程序；
- 三、擁有工資便宜的熟練及不熟練的工人；
- 四、擁有充足的受訓生產勞動力；
- 五、擁有加工和製造業所需一系列低成本的本地出產原料，如木材、棉花、紡織品、水果、糖、蔬菜、肉類、海鮮、皮革、咖啡、可可及香料；及
- 六、根據美國加勒比海盤地行動計劃，洪都拉斯許多產品進入美國都可以免稅。

#### 出口加工區

洪都拉斯政府在一九八七年立例通過設立出口加工區，由私人企業家私自擁有及管理。目前，國內的七個出口加工區分佈在聖佩德羅蘇拉的四周，包括布法羅、喬洛馬（四個）、拉利馬及比亞努埃瓦，享有等同自由貿易區的特權。

### 出口公司適用的法例

臨時進口法適用設立於指定自由區以外而產品全部出口到中美洲地區以外市場的公司。合資格的公司可免稅進口

生產所需的設備及材料，亦可免課所得稅達十年之久，但卻必須繳納城市稅及出口稅。（出口稅為單據價值的1%。）

至於公司的法定架構，洪都拉斯法律允許外資擁有全部所有權。在當地組織的合資公司可以下列任何形式存在：Sociedad Anonima（有限公司）、Sociedad Anonima de Capital Variable（有限公司，為合資公司可以購回其股票的唯一合法架構），以及Sociedad de Responsabilidad Limitada（有限責任合夥）。

### 業務推廣

洪都拉斯境內有很多專門推廣出口、貿易及投資的代理公司，包括：

- 一、USAID——美國國際發展代理為出口加工區發展提供技術支援及信貸；
- 二、FIDE——為推廣工業投資及出口提供技術性服務；
- 三、FEPROEXAAH——推廣農業出口及合資企業；
- 四、HAMCHAM——洪都拉斯—美國商會；及
- 五、ANDI——國家工業家協會。

### 投資

洪都拉斯的商人及工人都以從事出口生產而享負盛名。然而，以製造利潤為共同目標的美國、歐洲及亞洲投資者，亦對其成功貢獻良多。

倘需更多資料，請與洪都拉斯領事館聯絡，地址為香港中環皇后大道中20號太平行1303室，或致電522 6593。

（資料：洪都拉斯領事館）



## 中美港貿易

### 中美貿易事項報告

#### 最惠國待遇發展情況

一般預測美國總統布殊會於六月初無條件延續中國多一年的最惠國地位，看來美國國會議員今年會努力地去阻止或提出條件來予以延續。

中國在多個項目上仍然備受壓力。國會已開始調查中國與毒品有關的事項，加利福尼亞州民主黨眾議員Nancy Pelosi的辦事處內人士透露，她正嘗試制定一項會於六月初提交的議案，續以最惠國待遇為手段，強迫中國就人權、囚犯勞工及販賣軍火武器政策作出修改。跡象顯示Pelosi的想法可能會有別於最近一項終告失敗的法例，嘗試針對中國國營企業的產品及遞減其最惠國關稅優惠，而非採取不全則無的方法。另一個來自眾議院外交事務委員會的消息顯示，俄亥俄州民主黨眾議員Don Pease正與Pelosi並肩工作。他表示他們正討論在議案內針對國營企業，同時亦考慮其他多項意見，故這方面的想法仍未可作實。

預料一段期間內國會仍將威脅向中國採取貿易限制行動。美國當局一向均以各種的貿易制裁為主要工具，來表達對其他國家（例如蘇維埃集團國家及南美）的形勢以及本身雙邊貿易逆差的關注。

#### 美港法案

在五月七日，參議院外交關係委員會一致通過肯塔基州共和黨參議員Mitch McConnell提出而後經修訂的一九九二年美國香港法案。

該修訂議案已經作出多方面修改，以消除對美國欲成為其中一方有權執行中英聯合聲明的憂慮。

現時，議案的目的被形容為美國總統對聯合聲明中所反映的政策及決定表示支持、美國對香港在世界經濟上的角色感興趣、美國對民主化的支持，以及美國對人權的支持。修訂議案根據聯合聲明的條款，在「適用之處」指示行動，而非對聯合聲明的條文硬加詮釋。議案不再載有國會理解香港特別行政區將獲賦予行政、立法及獨立司法權，包括最終審判權等說明。

修訂議案並不規定國務卿向國會提交的報告以「在香港實施聯合聲明的程

度」為焦點，而是括入「美國感興趣」的事項，例如港美關係、「香港主權改變對美國利益構成影響的有關發展」、「香港民主制度的發展」及香港在多邊談判上的參與程度。

或許最重要的改變，就是在修訂議案的二〇一條款內，賦予美國總統特定權力，可通過總統命令停止美國對香港繼續引用任何本土法例。議案亦進一步在二〇二條款內規定，美國總統在作出任何該等決策時，「應考慮聯合聲明內所表示有關香港的條件、責任及期望」。這些規定的作用是，若果美國總統認定香港的自主權力不再足以使其享有有別於中國的待遇時，便會賦予彈性權力取消有關的特定法例。

委員會已公佈該議案，並已納入參議院日程表內，候參議院全體成員行動。立例的支持者預測參議院會快速行動，但目前仍不可能預測到參議院全體成員會否及何時會着手處理。眾議院並未有把議案提交委員會考慮，因而委員會所公佈的議案會是甚麼模樣，又或是眾議院何時會進行表決，均難以預測。一名政府代表曾於九二年四月二日的聽證會上，在參議院東亞太事務小組委員會面前表示布殊政府支持參議員McConnell議案的目標，然而政府至今仍未對該修訂議案正式表示立場。

#### 違反美國海關法

輸美中國紡織品發生了欺詐事件，有關重要調查所帶來的首個結果，是布殊政府於五月六日宣佈控告若干公司及人士。過往，多項指控均針對中國透過其他國家轉運大批紡織品，以避過美國配額限制。布殊政府因應國會及對輸美中國貨品欺詐海關所提出的其他檢控，而展開了積極性的調查。九一年九月及十二月，美國發出大量的搜查證，以找尋欺詐海關的證據。

於五月六日宣佈的控告包括刑事起訴若干中國公司及人士、兩間美國入口公司及三名美國居民。在不少政府政策評論家集中於宣稱中國違反配額及轉運貨品時，控告並未有提及，卻宣稱被告向美國海關低報輸美商品的價值，以致少付了關稅。另外更檢控有一些被告違反美國稅務條例，隱瞞美國公司賺取的佣金收入。該等被告若經定罪，將被判罰款及入獄。

宣佈控告的翌日，眾議院一小組委員會就欺詐海關事件舉行聽證會。席上，北卡羅萊納州共和黨眾議員Alex Mcmillan根據一份由美國國家針織及運



動服裝協會的Seth Bodner所提交的書面聲明逼使證人就香港是否牽涉入由中國轉運紡織品事件作證。美國海關代表相信轉運的貨品曾經巴基斯坦、馬來西亞、台灣、巴拿馬及洪都拉斯。駐港美國高級海關代表Thomas Gray表示，美國海關有證據顯示經香港海運抵境的中國貨品上附有「香港製造」的標籤（或其他虛假的原產地標籤）。然而，他表示在破除紡織品欺詐事件中，香港政府已較其他任何政府更全面與美國合作。

#### 美國貿易代表辦事處與中國商談三〇一條款

美國貿易代表辦事處與中國就有關進口壁壘的三〇一條款第六回合談判，於五月尾完成。

美國政府一消息靈通人士指出，美國並不會堅持在六月底前完成該等談判，若果未能如期完成，則限期會延至十月。他並表示兩國並未有把事項的範圍收窄。

另一方面，美國貿易代表辦事處最近把台灣、印度及泰國識別為「前列海外國家」，這名稱在美國特別三〇一法例下的定義，是指一些國家不能成功地保護知識產權，對美國貿易的潛力構成最大的影響。這是台灣首次被識別為「前列海外國家」，反映布殊政府在貿易問題上，即使是對關係密切及友好的國家，也會採取積極的行動。美國已與台灣商談貿易事宜，特別是電腦軟件版權盜用，但對台灣所提出的補救方法並不滿意。美國貿易代表辦事處必須在30日內宣佈會否就台灣的行為展開調查，此舉進一步顯示美國極可能會在貿易問題上向中國長期施加壓力。

（資料：本會顧問——百德與馬田國際律師行）

## 市場報告

### 成衣輸日指南

日本由於沒有配額限制、低關稅和本地生產萎縮，近年成衣進口有所增加。一九九一年，日本進口的成衣估計達89億美元（約694億2,000萬港元），緊隨美國和德國，成為世界上第三大進口國。

#### 香港輸日成衣

##### 本產出口

自八八年起，成衣成為香港對日本出口的主要本產項目，九一年佔有率達22%。日本是香港成衣出口的第六大市場，佔香港成衣本產出口總值的3.4%，達25億1,300萬港元。在八十年代末期，輸往日本的本產成衣出口激增，出口總值由八六年的8億600萬港元升至八九年的33億3,200萬港元。可是在九〇與九一年間，本產出口下降而轉口則繼續增加。原因是從前供應日本市場的香港廠商已將其生產轉移到中國。

主要出口項目包括套裝和上衣（九一年佔總數的31.6%）、毛衣（30.0%）、恤衫（6.5%）、女裝鬆身恤衫（6.3%）、西褲（5.0%）和半截及連身裙（4.8%）。去年有強勁增長的項目包括恤衫（+54%）、三角褲及內褲（+25%）、泳衣（+212%）、工人褲及圍裙（+11%）和雨衣（+31%）。

羊毛和棉為最受歡迎的布料，分佔總數的27.1%和21.5%。其他質料包括皮革（19.5%）、人造纖維（15.8%）和真絲（7.7%）。去年有較大增長的只有棉類（+14%）。

##### 轉口

成衣亦是香港對日本轉口的最大項目，在九一年佔總數的24%。自八十年代起，轉口日本的成衣比本產出口增長快得多。在九一年，轉口有18%的增長，總值達72億3,520萬港元，為本產出口的三倍。大部份的轉口貨（97%）都是中國原產的。

轉口主要項目包括毛衣（33.6%）、恤衫（12.4%）、西褲（11.5%）、套裝和大衣（11%）和半截及連身裙（5%）。有些項目在九一年有非常高的增長率，如毛衣（+28%）、恤衫（+21%）、半截及連身裙（+48%）、手套（36%）、男女內褲（+72%）、雨衣（+263%）和泳衣（+153%）。

用料方面，棉仍然佔最大宗

（43.6%），而羊毛（23.3%）和人造纖維（20.0%）亦很重要。除真絲以外，去年各類都有大幅增長。

### 市場規模及進口情況

#### 市場整體規模及進口

在九一年的頭11個月，整個日本成衣市場以價值計算增長了4%，總值為46,740億日元（約2,804億4,000萬港元）（出廠價），其中本地貨佔35,200億日元（約2,112億港元），而進口貨則為1萬1,540億日元（約692億4,000萬港元）。因此，本地生產約佔整個市場75%，而進口則佔約25%。八七年，進口的市場佔有率只為12%，由此可見，自該年起，進口的增長至為急劇。展望未來，進口的比率估計會繼續增加，原因是日元對其他貨幣的強勢和該國生產成本增加將導致更多名牌廠商將生產轉移到外國承包製造商。

##### 進口（以產品分類）

在九一年佔進口最大比率的產品是T恤、恤衫和女裝鬆身上衣，總值2,230億日元（約133億8,000萬港元），佔19.3%。毛衣和大衣亦分佔頗為重要的17.5%和11.1%，以大致計，外衣佔最大比率，為84.1%。內衣／睡衣佔4%，而配件則佔11.9%。

##### 進口（以質料分類）

棉為日本成衣進口最流行的用料，佔全部34.6%。人造纖維（22.4%）和羊毛（17.1%）繼續分別成為第二和第三大類。同時，皮革（11.3%）和真絲成衣（4.3%）經過八十年代末期的強勁增長後，去年表現已轉趨疲弱，而相對比重亦因而下降。

#### 成衣進口主要來源

九一年，中國取代了南韓，成為日本進口成衣市場的主要供應國，佔總進口35%。造成這個轉移情況的主因是南韓的價錢競爭力下降，而中國則無論在手工和品質控制方面都有改進。日本六大成衣進口來源地（即中國、南韓、意大利、美國、台灣及香港），共佔總進口85%。

#### 香港在成衣進口所佔比率

在九一年頭11個月，香港佔日本成衣進口的3.9%。這百分比由八九年的5.4%一直下降。根據貿易資料，市場佔有率的下降主要是由於生產設施轉移到

中國內地所致。

### 分銷系統

大多數日本廠商都經大型批發商銷售其產品，而亦有少數廠商銷售本身牌子的貨品，稱為「牌子廠商」。市場銷售總額中約71%的貨品是由批發商向本國廠商訂購。

進口約佔整體市場的25%，其中約有四分一，即7%，由批發商直接進口。大部份進口都由進口商負責，然後轉賣予批發商及零售商，大約有十分一的進口由海外廠商直接供應給日本零售商。

近年有愈來愈多大規模零售商從海外廠商直接購貨。由於這些大型零售商有充裕的購買能力，他們無須經中間人購買成衣。在一些情況下，大規模零售商會使用批發商的服務，但有關批發商只被視為零售商對外的購貨部門。在很多情形下，成衣都以進口商或零售商的牌子出售，而成衣製造商的作用只是承包製造。

大約有90%市場分銷都經批發途徑。可是這比率已從八七年的94%逐漸下降。這種轉變的主因是對零售商直接銷售（主要經進口商）日漸增加。此趨勢以海外高檔成衣製造商最為明顯。有些香港時裝名牌與日本大型分銷商有聯繫，藉以拓展市場。

#### 東京和大阪的重要性

東京和大阪是日本最重要的成衣分銷中心。在高檔時裝方面，東京是日本的時裝中心。可是對那些不是發展高檔市場的成衣廠商而言，大阪的地位同樣重要。

### 日本進口規例

成衣可自由輸入日本，不受配額限制。近年來成衣進口規例亦無變更。日本沿用多欄進口稅制度，稅率以「普通」、「關貿總協定」、「普及特惠稅制」及「暫時」分類。在評估課稅時，一般先採用普及特惠稅率（只適用於普及特惠稅制受惠國），然後依次採用關貿總協定稅率、暫時稅率及普通稅率。倘若關貿總協定稅率較其他稅率為高，則採用暫時稅率。

日本的普及特惠稅制對進口該國的成衣給予優惠待遇，而香港和中國均在受惠之列。不過，日本設有全球性的特惠成衣進口最高限額，基本上以先到先得的辦法實施。當特惠限額用罄後，進



誠邀各公司鼎力支持  
共襄善舉

# 愛心滿東華

## 慈善展銷會

### 目的

為東華三院籌募提供免費醫療服務所需費用。

### 日期

一九九二年七月三十一日（星期五）至八月二日（星期日）

### 地點

香港會議展覽中心五樓低層展覽廳

### 參加辦法

- （一）租賃展銷商品攤位：  
用以展銷公司商品，每個攤位之捐款為三萬元，另須將營業額百分之二十捐予東華三院。
- （二）租賃推廣服務攤位：  
只用以推廣公司業務，每個攤位之捐款為三萬元。
- （三）捐贈商品：  
捐贈貨品零售價值為六萬元或以上者可獲分配一個獨立攤位，捐贈之貨品價值如少於六萬元，則交由大會負責之攤位銷售。所得全部撥捐東華三院。

### 查詢電話

東華三院：859 1828/859 1888  
香港中華廠商聯合會：542 8641

### 主辦機構

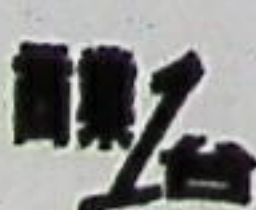


東華三院



香港中華廠商聯合會

### 協辦機構



商業一台

# 參與展銷 愛心光照

參與會員將在廠商會大型活動上獲頒感謝獎狀

口則需按暫時稅率繳稅。此外，還有一個每國最高限額的制度，即在同一個財政年度內，個別受惠國對日本出口的成衣，能享特惠稅的不能超過全球特惠總額的四分之一。

### 安全規例及品質規定

#### 安全規例

日本的衣服安全規例不多。主要管制成衣製造商的有「含有毒物質的家庭物品登記法」。廠家不能使用對皮膚有害的經甲醛液或deldrin處理布料。還有，在成衣上使用與皮膚有接觸的熒光漂白物質，特別是供嬰兒用的項目均受限制。這些限制適用於成衣製造過程中的初段。

法律沒有規定產地來源標籤。不過為顧及消費者利益起見，所有成衣，不論價錢及在何處購買，都必須附有標籤，清楚列明質地及所需的清理方法，例如清洗及乾衣辦法。進口商或分銷商須負責進口成衣的標籤。

#### 建議

##### 面談的重要性

面談在日本文化中佔有重要位置，不容忽略。任何對面談有助的安排，例如僱用精通日文的員工，均屬正確的做法。除此之外，在商談價錢之前，香港出口商應詳細解釋自己工廠的運作，如機器、紗線、布料、生產量及最低訂貨量等，因為這些資料都是日本買家在交易前必要知道的。商談過程可能很長，所以出口商應作好準備再三探訪買家。

##### 價格競爭力

有些國家的價格比香港平宜，因而取得優勢，所以香港出口商亦應在價格方面下工夫。在報價時，出口商必須快而準地報上最佳價格，否則日本買家會視之為外行。

##### 客戶要求

香港出口商應重視客戶對品質、設計及交貨期等方面的要求。無論在那個消費層面，日本人都十分精明，而且要求又高。若要增加在這個市場的佔有率，出口商對這些問題需要敏感的反應。

##### 洞悉貿易先機

香港出口商對進口商、批發商及最重要的零售商進行市場調查是較好的，



從而了解日本各層面對進口香港成衣的看法。若成衣出口商能清楚分辨問題所在、需求及對產品的特殊要求，便能更準確及有效地集中運用資源，爭取更美好的成績。

（資料：香港貿易發展局）

### 西班牙：市場展望及投資環境

西班牙擁有3,900萬居民，無論以人口或經濟規模計算，它都是歐洲共市的第五大成員國。為了加強與西歐的聯繫，西班牙於一九八六年加入歐洲共市。這個決定推動了西班牙的經濟開放，並自此因外來投資及國內私人消費不斷增加，西班牙的經濟享受了一段持續增長的期間。雖然九一年的國內生產總值增長率估計會從八六至九〇年間平均的4.5%下降至2.6%，但是經濟復甦已在望。預期九二年的經濟增長可達到3.6%，與此同時，高企的失業率正不斷下降，而通貨膨脹亦徘徊於頗低水平。

自八六年起，西班牙已把進口障礙

逐漸撤除。因此，進口稅率已普遍遞減，到九三年，西班牙將全面採用共市的共同關稅率。自八六年起，該國亦逐步實施共市的普及特惠稅制，並計劃於九六年全面實施。

現時，大部份產品都可以自由進口西班牙。在過去，紡織品及成衣受到全球性配額限制，但自從加入共市後，該限額已為香港與歐洲共市簽訂的紡織品協議所取代。此外，對其他香港產品的全球性配額亦已被廢除。剩餘下來的人造首飾、旅行用品及手袋、錄影機、揚聲器、擴音機、錄音機及播放機、電路用之電器及洋娃娃等的限額亦已在九二年初撤銷。預期這些產品的銷路會因而攀升。

香港對西班牙的總出口（包括本產出口及轉口）在九〇年增加了21%。於九一年首11個月，增長更升至48%，總值達60億7,400萬港元。主要出口產品為成衣、鐘錶、收音機及紡織品。導致香港對西班牙出口急升的因素有三：一是西班牙加入共市，減少了進口障礙；二是西班牙貨幣（比塞塔）的升值；三是在九二年舉行的各項國際旅遊盛事。中期來看，由於西班牙的經濟繼續向前邁進，加以進口政策不斷開放，銷往該





國的港貨續增可期。

可是，西班牙市場亦非沒有缺點。例如，國民入息水平較歐洲整體的標準為低，而失業率仍高達16%。加上市場競爭日趨激烈，更使情況顯得困難。然而，鑒於香港在該國進口市場的佔有率僅0.3%，顯示大有擴展餘地。為了增加銷路，香港出口商必須進一步提高產品設計和品質，加強價格競爭力，和縮短交貨期。

銷貨往西班牙的出口商應留意，該市場是由數個以馬德里及巴塞隆納為中心的區域組成。香港公司可在這兩個商業中心聘用代理或經銷商去售貨，或自行設立分公司。香港公司在西班牙開設業務，不但可以向無數的小型零售店推銷，更可與日益壯大的百貨公司及超級市場加強聯繫。一些本地大型企業已在西班牙發展業務，而一些規模較小的香港公司亦有在西班牙開設辦事處，直接向當地的零售商和經銷商售貨。

此外，西班牙製衣業也值得留意，該國製造的成衣，不但可以供應當地龐大的需求，又可自由輸入歐洲共市，更可在葡萄牙和北非洲國家進行低成本的分包生產。由於西班牙已不再是一個廉

價的生產地，香港廠商在當地的生產活動應集中於高增值產品。卡塔洛尼亞是該國最大的工業區，亦是大多數人選擇設立生產設施的地點。另一方面，馬德里是西班牙首要的服務中心。

(資料：香港貿易發展局)

## 法國皮草及皮衣業的變化

法國皮草及皮衣業在經過過去一年的艱苦經營後，目前業內批發商均銳意擴大分銷層面，吸納更多類別的商店從事皮草及皮衣的零售。

現時，所有零售渠道都成為這些批發商吸納的對象，其中包括有意將分銷範圍擴大至男裝的中檔專門店，以至美容院等高檔渠道。

這種轉變意味著該業的經營方針有所更改：在一九九一年的多項成衣貿易展覽會中，新的方針更為明顯。在這些展覽會舉行期間，製造商在忙於為冬季補充存貨之餘，還致力更新產品的款式設計，以迎合最新時裝潮流及零售商的

由此可見，現時最大的改變是皮草及皮衣批發商融匯了成衣分銷市場的慣例和需求，這些改變與廠商日益採用不同質料的趨勢互相呼應。

目前，質料上的變化已不限於皮草與皮革的搭配。在其他質料的服裝上飾以皮草鑲邊的設計仍然時興，不過，真正的革新在於採用全紡織或針織布料服裝與皮衣系列相互配搭。

在皮草及皮衣廠商的九二年春夏季系列中，布料服裝均佔有重要地位。他們都感到不能讓春夏季無生氣，因此致力推出新產品以填補冬季與冬季之間的空檔。

事實上，運動服裝市場亦出現同樣的趨勢，進口商均考慮兼營皮衣、紡織品、鞋類及配件配飾。

由於廠商希望增加客路，擴大業務範圍和減少專類經營已是大勢所趨。這個趨向也迫使製造業保持敏銳的觀察力，時刻力求創新，並且全年都從事生產。

(資料：香港貿易發展局)

## 展覽概要

日期	展覽會	地點	展品	主辦機構
一九九二年				
八月六日至九日	國際健康產品展覽	香港會議展覽中心	健康食品、飲料及產品、健身儀器、其他健體設備及技術	海岸國際展覽有限公司 電話：827 6766 圖文傳真：827 5224
八月十二日至十六日	美食博覽 '92	香港會議展覽中心	一般食品及飲品、酒及酒精、配製成份、天然食品、健康食品、嬰兒食品	香港貿易發展局 電話：584 4333 圖文傳真：824 0249
八月廿日至廿一日	法國時裝展	九龍香格里拉酒店	男女及兒童時裝、成衣、皮具、皮草、時飾	法國紡織商務處 電話：312 0331 圖文傳真：739 8073
九月七日至十一日	香港鐘錶展覽會 '92	香港會議展覽中心	鐘錶、配組件、檢查及測量儀器、機器、設備及工具、手錶的售後服務	香港貿易發展局 電話：584 4333 圖文傳真：824 0249
九月十八日至廿二日	香港國際珠寶展覽會 '92	九龍香格里拉酒店	真珠寶	香港貿易發展局 電話：584 4333 圖文傳真：824 0249
九月十九日至廿三日	第十屆香港珠寶節	香港會議展覽中心	珠寶、鐘錶、玉石、飾物、機械及儀器	精英國際展覽有限公司 電話：827 5121 圖文傳真：827 7064
九月廿二日至廿五日	現代清潔用品及器材展 '92	香港展覽中心	工業環境清潔用品及器材	香港展覽中心 電話：827 9908 圖文傳真：827 5245

## 訓練概覽

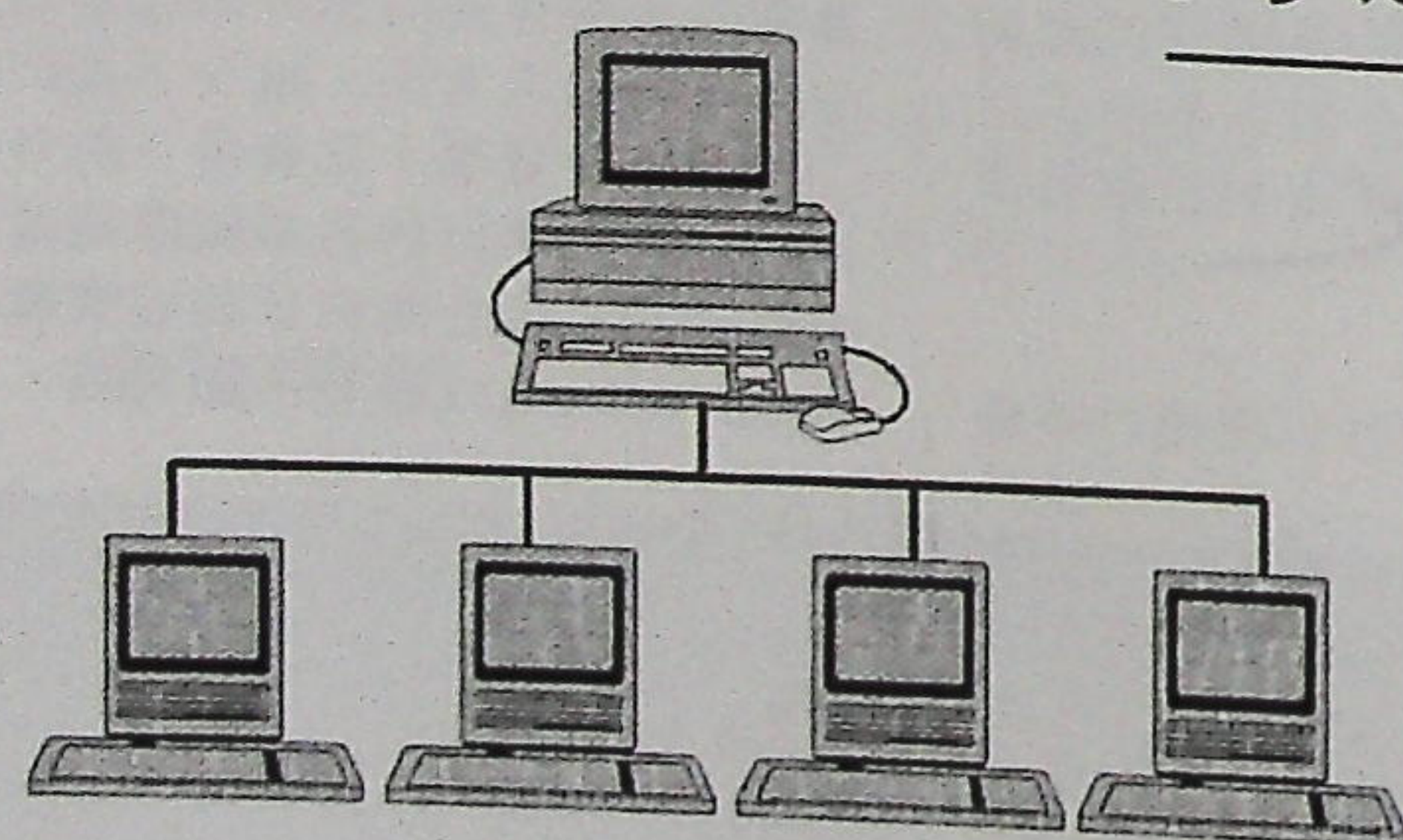
日期	項目	地點	主辦機構	聯絡人/電話
一九九二年				
七月廿日至廿四日	ISO 9000首席稽核員證書課程	廠商會大廈會議廳	廠商會檢定中心	該中心梁滋豪先生 698 8198
七月廿一日至九月十六日	私人電腦應用組合課程	香港訓練中心	香港中華廠商聯合會及香港生產力促進局	廠商會劉財倫小姐 542 8600內線633
七月廿三日	管理人力規劃研討會	職業訓練局大樓	香港管理專業發展中心	該中心尹奕書先生 836 1828
七月廿八日	中小企業經營管理協會研習班——利潤管制	職業訓練局大樓	香港管理專業發展中心	該中心邢宏彬先生 836 1826
八月三日至六日	中國經濟生產率效益與改革研討會	香港中文大學	香港中文大學	該大學余國璋先生 609 7031
九月七日至廿五日(星期一及五)	產地來源證及進出口簽證訓練課程	廠商會大廈會議廳	香港中華廠商聯合會	廠商會歐陽汝發先生 542 8600內線602
十月六日至九日	EDI Asia '92	香港會議展覽中心	貿易通	804 1033
十月十九日至廿二日	九二年全球商業機會會議	大阪	大阪商工會議所	廠商會林建業先生 542 8600內線620



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- 工程成本

### 生產系統

- 產品結構
- 物料需求
- 物料訂購
- 存貨賬

### 銷售管理

- 報價單
- 銷售合約
- 銷售分析

○ 多種貨幣

\* 另有電腦條碼打卡系統 \*

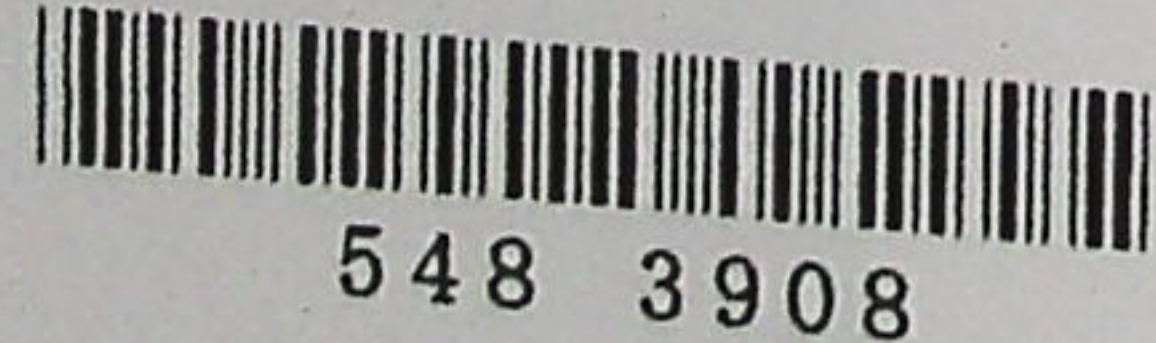
○ 自動過賬

\* 專業程式設計員更能為貴公司度身訂造，編寫獨有電腦程式。\*

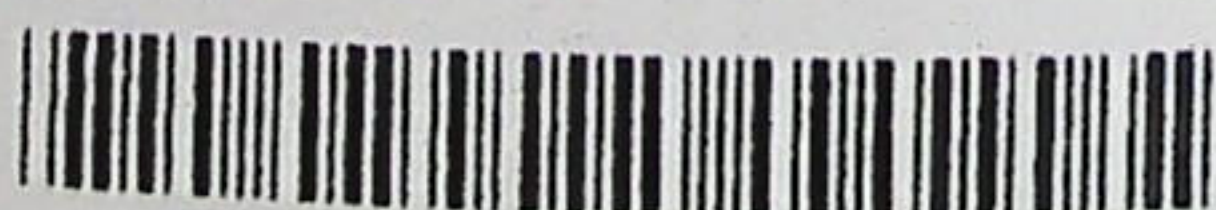
○ 密碼保安

歡迎致電垂詢：

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# 中華全國工商聯代表團訪港 ACFIC Delegation to Hong Kong



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# ACFIC Delegation to HK

To acquire first-hand information on the development of economic reforms in China, the Association organized a delegation to visit Beijing in last November. The delegation was well-received and, through the visits, the Association have strengthened its communication link with the All-China Federation of Industry and Commerce (ACFIC). In the first half of 1992, the Chinese government had accelerated the pace of the economic reforms which helped foster rapid economic progress both in China and Hong Kong. To keep members abreast of the latest development of economic reforms and to provide an opportunity for the Chinese industrial and commercial sectors to better understand Hong Kong's latest economic environment as well as the trading and industrial development, the Association invited the ACFIC to send a delegation to visit Hong Kong from June 15 to 23. A Memorandum of Understanding (MOU) was also signed by the Association and the Federation during the period in order to further strengthen the ties between the two organizations.

An eight-member delegation from the ACFIC, led by Mr Jing Shu Ping (Delegation Leader) and Mr Liang Shang Li (Deputy Delegation Leader), Vice-Chairmen of the ACFIC, arrived at Hong Kong on June 15. Other members of the delegation included Mr Chen Jian, Executive Committee member; Ms Wu Hui Chan, Advisor; Mr Hu Fu Chang, Deputy Director of Research Office; Mr Sun Fa Neng, Division Chief; Ms Peng Kai, Director of Liaison Department; and Ms Huang Shan, Secretary of Liaison Department.

## Delegation Visits CMA

In the morning of June 16, the ACFIC delegation visited the Association and was received by CMA President Mr Herbert Liang; Vice-President Mr Yip Hing Chung; Honorary Presidents Mr James Wu and Mr Seto Fai; Executive Committee members Mr Alexander Lo, Mr Wong Ping Sai, Mr Graham Cheng, Mr Yuong Mok Shing, Mr Liu Yu Ting and Mr Lee Sai Yick; General Committee members Mr Choy Tak Ho, Mr Leung

Chung Lick, Mr Michael Chan, Mr Chow Yun Sheung, Mr Lau Chi Yuen, Mr Edward Wong, Mr Lam Hok Po, Mr Chiu Chun Bong, Mr Lee Hung Tong, Mr Lee Chung Chiu, Mr Paul Chu and Mr Chau Chiu Shui. Both parties exchanged their views on China's latest development of economic reforms and discussed on ways to further collaborate for the industrial and trade development of China and Hong Kong.

Mr Jing Shu Ping pointed out that the remarks made by Mr Deng Xiao Ping during his visit to Guangdong has accelerated economic reforms in China. "Economic reforms are no longer restricted to the coastal areas, they will extend to the areas along the Yangtze River and along the border e.g. Heilongjiang, Inner Mongolia, Xinjiang, Yunnan and Guangxi. More than this, the reforms and open policy will not only be confined to regional expansion but will also apply to some other economic sectors like the property market and the security market," said Mr Jing. Meanwhile, Mr Jing also recognized the importance of Hong Kong to the economic development of China.

As regards to the signing of the MOU between the ACFIC and the Association, Mr Jing expected that it would enhance the economic co-operation between the two areas and would quicken the economic progress in China on the one hand and maintain the prosperity and stability of Hong Kong towards and beyond 1997 on the other. Mr Jing also stated that as the Chinese government has begun to recognize the importance of product quality; valuable experience of Hong Kong enterprises in management and operation could assist China in improving the quality of products.

In response to the address made by Mr Jing, Mr Herbert Liang said that there would be more investment and co-operation opportunities available for Hong Kong manufacturers at the time when economic reforms take place all over China. The signing of the MOU bear a timely significance to the present situation.

Mr Liang also said, "A substantial por-

tion of Hong Kong manufacturers have already developed close relations with enterprises in China. In the past, the co-operation mainly took the form of production sub-contracting. Accompanied with the opening up of other economic sectors like the service industry, property and financial markets, Hong Kong manufacturers can venture into the domestic market of China which will bring a new era of economic co-operation."

Mr Liang Shang Li then gave a brief introduction on the ACFIC. Having more than 500,000 members and 1,985 branch offices all over the country, the ACFIC, which follows the principle of the open-door policy, can assist Hong Kong manufacturers to develop their businesses in China. "At this stage, one of the major mission of the ACFIC is to provide co-ordination among the foreign-funded enterprises, local private enterprises in China and overseas manufacturers," said Mr Liang. He indicated that the leaders of China have shared a common goal to implement the open-door policy. Besides, he also claimed that the Chinese government has recognized the patriotism of Hong Kong people and would take their opinions into consideration when the government makes its policies.

Mr Yip Hing Chung highly appreciated the open-door policy adopted by the Chinese government and said that the co-operation between Hong Kong and China would not be restricted to the assembling industry and joint-venture projects but would extend to large-scale investment. However, there are certain problems that need to be tackled first. Examples are the regulation on land acquisition, the opening of the domestic market, the adoption of international management system, etc.

Mr James Wu opined that a stable economic environment is essential to attract the setting up of foreign enterprises. Under the open-door policy, Hong Kong manufacturers are more than willing to invest in mainland China. He hoped that the ACFIC could brought forth the opinions of Hong Kong manufacturers to the Chinese authority and assist in providing proper channels for foreign investment in China.

Mr Seto Fai welcomed the further economic liberation in China. As the economic performance of many advanced countries is not so satisfactory in recent years, the global economic focus has turned to East Asia. Mr Seto opined that, under this circumstance, quickening the pace of economic reforms in China, accompanied by the development of stock market, the property market and the tertiary industry, would lead to rapid economic development in China. Therefore, close co-operation between Hong Kong and China would benefit both areas greatly.

## Signing of CMA-ACFIC MOU

To reinforce the communication and co-operation between the Association and the ACFIC and to facilitate the economic and trade development of Hong Kong and China, Mr Liang and Mr Jing on behalf of the Association and the ACFIC respectively, signed a MOU on June 17 at the Hotel Victoria.

In his address delivered at the signing ceremony, Mr Liang said, "The close and

interdependent relationship between Hong Kong and China has been established for a long time. The financial and marketing experience cumulated by Hong Kong will assist China to implement economic reforms. On the other hand, Hong Kong can make use of China's abundant resources and technologies to help foster its industrial advancement and transformation. In this regard, with increasing trade and business activities between Hong Kong and China, we believe it will lead to many co-operation opportunities. Hence, it is essential to strengthen our connection with China."

Mr Liang continued, "There are many similarities between the Association and the ACFIC in our objectives and work. Both organizations place emphasis on promoting trade and industrial development. The signing of the MOU will formalize the co-operation between our two organizations especially on the exchange of industrial and market information, industrial technology and manpower training. Through such communication, we hope to upgrade the two areas' co-operation level from assembling and labour-intensive industries to capital intensive and technology-intensive industries."

Also at the same occasion, Mr Jing indicated that a majority of the CMA members have business relationships, of one form or another, with their counterparts in China. These contacts and joint activities have helped promote mutual understanding and have facilitated industrial and business co-operation between the two places. This helps to maintain the prosperity and stability of Hong Kong and render support towards the four modernization programs in China.

Mr Jing also took the opportunity to introduce the ACFIC and its future direction. "The ACFIC is a country-wide people's organization representing Chinese industrial and commercial interests. In recent years, the ACFIC has devoted more efforts towards promoting non-state economic activities and has recruited a substantial number of rural enterprises, foreign-funded enterprises, private enterprises and individual proprietors as members. Non-state economic activities are complementary to the public economic activities in China. They will continue to exist and develop in the future and the ACFIC will actively promote the healthy growth and development of non-state economic activities in China," said Mr Jing.



THE UNIVERSITY OF HONG KONG

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香港大學專業進修學院 Education

## 161. 中國對外經濟貿易：政策、法律與實務 (與中山大學合辦之證書課程)

(Joint Certificate Course in China Trade and Investment)

宗旨：本課程的目的，在於從高層次研討中國自改革、開放以來，在對外貿易和利用外資等經濟合作方面的成效與問題，現行的體制、政策和法律，以及對中國進行貿易和投資的操作技巧。學員不僅接受課堂教學，並且安排與內地官員會晤及到各有關單位訪問，作直接溝通。從而做到理論密切結合實際，去了解如何開展對中國的貿易和投資，以取得良好的經濟效益。

課程內容與教學方式（總課時共100小時）：

(甲)在香港上課二十次（60小時），每次一題3小時。共八週，前四週每週上課三次，後四週每週上課二次。講課內容分三部份二十題。第一部份概論：  
(1)中國社會主義經濟的建立和發展；(2)中國經濟體制改革；(3)中國對外經濟貿易的發展。第二部份中國對外貿易：(4)中國對外貿易體制；(5)中國外貿機構與大型外貿活動；(6)許可證與配額管理；(7)、(8)中國商品出口貿易（上下）；(9)、(10)中國商品進口貿易（上下）；(11)中國對外技術貿易。第三部份中國對外經濟合作與利用外資：(12)中國對外經濟合作的內容與體制；(13)中國投資環境與項目選擇；(14)中國利用外資的方式與程序；(15)中外合資企業；(16)中外合作企業；(17)外商獨資企業；(18)對外加工裝配與補償貿易；(19)國際租賃；(20)總結。

(乙)赴廣州調查、洽談一周（30小時）：

(1)聽廣東省、廣州市對外經濟貿易部門官員和企業經理報告與座談五次。(2)到廣州市經濟技術開發區、外商投資企業（即「三資企業」）、對外加工裝配與補償貿易企業（即「三來一補」企業）以及外資企業，參觀與洽談五次。

(丙)研討、習題與考試（10小時）。

證書：全部課程結束，學員考試合格，由香港大學專業進修學院與中山大學成人教育學院聯合頒發專業證書。

主講人：張志輝教授（中山大學嶺南（大學）學院經濟系講座教授、經濟研究所所長、廣州國際經濟貿易學會副會長）

地點：在香港及廣州（詳情容後公佈）

時間：一九九二年十月六日至十二月五日（用粵語講授）

全期學費：四千八百元（往返廣州的交通及在廣州市的食宿費用，由學員自費）

報名手續：申請人可親往下列地點報名（繳費時宜用劃線支票）：  
香港大學專業進修學院（前校外課程部）市區中心香港干諾道中二百號信德中心西翼15字樓。（由2字樓商場電梯上）

電話：858 4515（星期一至五：上午九時至下午五時。星期六：上午九時至下午十二時三十分。）



On the same day, the Association also hosted a cocktail reception to celebrate the signing of the MOU and held a press conference for disseminating the information of the signing ceremony. Other than Mr Herbert Liang, attendants of the reception also included CMA Vice-Presidents Mr Leung Nai Wing, Mr Yip Hing Chung, Mr Chan Wing Kee and Mr Tony Chau; Honorary Presidents Mr James Wu, Mr Wong Po Yan, Mr Seto Fai and the Hon Ngai Shiu Kit; Executive Committee members Mr Peter Hung, Mr Lo Chin, Mr and Mrs Graham Cheng, Mr Yuong Mok Shing, Mr Liu Yu Ting and Mr Choi Hin To and Mr Lee Sai Yick; and General Committee members Mr Chan Kim Sing, Mr Michael Chan, Mr Jose Yu, Mr and Mrs Chow Yun Sheung, Mr Edward Wong, Mr Joseph Sin, Mr Michael Sun, Mr Lam Hok Po, Mr Peter Lee, Mr Chiu Chun Bong, Mr Jan Thai Lun, Mr Paul Chu and Mr Chau Chiu Shui, Mr Tang Yee Hang, Mr Steve Lau and Mr Chow Lam Boon; Sub-Committees Chairmen Mr CK Fong, Mr Chao King Lin and Mr Yim Chan Chee; members Mr Chan Man Tak, Mr Tsoi Fat Pui and Dr Liu Han Qin. Mr Zheng Hua, Deputy Director of the Xinhua News Agency (Hong Kong Branch); Mr T H Barma, Director-General of Industry; senior executives from different chambers of industry and commerce; and Consul-Generals of different countries were also invited to attend the reception.

Besides the mentioned activities, the ACFIC delegation was arranged by the Association to visit the Xinhua News Agency (Hong Kong Branch), The Chi-



Delegation of All-China Federation of Industry & Commerce visits CMA.

nese General Chamber of Commerce, the Hong Kong General Chamber of Commerce, the Federation of Hong Kong Industries, the Hong Kong Trade Development Council, the Hong Kong Productivity Council, The Hong Kong Chinese Importers' & Exporters' Association, The Hong Kong Chinese Enterprises Association, the Hong Kong Chiu Chow Chamber of Commerce, the Young Industrialists Council, the Hong Kong Kwun Tong Industries and Commerce Association, the New Territories Commercial and Industrial General Association, the New Territories General Chamber of Com-

merce, The Stock Exchange of Hong Kong Ltd., The Modern Terminals Ltd. and the CMA Testing and Certification Laboratories. Through all these meetings and visits, the delegation has got a comprehensive understanding on the economic environment of Hong Kong and the operations of the visited organizations. It was believed that the visit of the delegation is a very fruitful one and would facilitate communication and understanding between the two areas.

The delegation departed Hong Kong on June 23.



(From left) CMA Vice-President Mr Leung Nai Wing, Leader of delegation of All-China Federation of Industry & Commerce Mr Jing Shu Ping & CMA President Mr Herbert Liang at the dinner hosted by CMA

## CMA Activities

### CMA Study Mission to Taiwan

Upon invitation by the Ministry of Economic Affairs of Taiwan, the Association despatch a delegation to visit Taiwan from May 24 to 27. The main purpose of the visit was to study Taiwan's current trade and economic conditions and to explore opportunities for more business and investment co-operation between Hong Kong and Taiwan.

The 19-member delegation was led by CMA President Mr Herbert Liang; delegates included Vice-Presidents Mr Tony Chau and Mr Tommy Zau, Executive Committee members Mr Alexander Lo, Mr Lo Chin and Mr Choi Hin To; General Committee members Mr Chan Kim Sing, Mr Lee Yue Chuen, Mr Chiu Chun Bong and Mr Kok Ying Dao; Sub-Committee Chairman Mr Chao King Lin; members Mr Sun Shiu Kau, Ms Cheung Man Ying, Mr Man King Fung, Mr Chan Sheung Chiu, Mr Chan Shui Shing and Mr Pang Chun Hon; Executive Secretary Ms Rita Tsui; and Assistant Secretary Ms Natalie Keung.

During the three-day visit, the delegation met Mr Hau Pei Tsun, Premier of Executive Yuan; Mr Huang Kun Huei, Chairman of Mainland Affairs Council of Executive Yuan; Mr Ma Ying Jeou, Vice-Chairman of Mainland Affairs Council of Executive Yuan; Mr Vincent Siew, Minister of Economic Affairs; Mr Yiin Chii Ming, Deputy Director-General of Industrial Development Bureau of Ministry of Economic Affairs; Mr Zhang Yue Chang, Deputy



Representatives of CMA study mission & Taiwan's External Trade Development Council toast with each other at a dinner.

General Manager of Taiwan's Productivity Centre; Mr Thomas Tsou, Executive Director of Second Department of Market Development of Taiwan's External Trade Development Council; Mr Lin Yi Fu, Deputy Director-General of Board of Foreign Trade of Ministry of Economic Affairs; Mr Chen Yung Hsiang, Deputy Director-General of Industrial Development and Investment Centre of Ministry of Economic Affairs. The delegation also visited the Industrial Technology Research Institute to view its facilities and efforts devoted by Taiwan towards industrial research and technological development.

During the visit, the delegation was warmly received by the Federation of Industries of Taiwan. A dinner was hosted by its Chairman Mr Hsui Sheng Fa to

welcome the delegates. The Association and the Federation also co-organized a seminar on May 27. CMA delegates and representatives from Taiwan's business and industrial sectors had exchanged valuable ideas and views on promoting industrial and economic progress in the two places.

At the seminar, Mr Herbert Liang pointed out that trade between Hong Kong and Taiwan is increasing rapidly. At the moment, Hong Kong is the second largest export market of Taiwan, and he expected that Hong Kong would become Taiwan's largest export market in the future.

Mr Liang continued that there exists a complementary relationship among China, Hong Kong and Taiwan and close co-operation should be established among the regions to foster trade and business links.

Representatives from Taiwan generally agreed that there was growing relations between Hong Kong and Taiwan manufacturers in recent years. There is a need to enhance business co-operation and exchange market information and industrial know-how in the future.

Mr Hsui Sheng Fa said that similar economic and investment environment exists in Hong Kong and Taiwan. Industry in both places is undergoing a transformation from labour-intensive to high-tech development. He hoped that closer linkage between Hong Kong and Taiwan would make each of them play a more influential role in the Asia-Pacific region. Lastly, he commented that the Association and the Federation would work together to promote the prosperity of Hong Kong and Taiwan.



CMA President Mr Herbert Liang delivers a speech at a seminar co-organized by CMA & Federation of Industries of Taiwan.



## Manufacturing Industry as Mainstay of HK's Economy

CMA President Mr Herbert Liang, opined that the manufacturing industry would continue to be the mainstay of Hong Kong's economy in the future. He believed that the manufacturing and servicing industries could complement each other towards the betterment of Hong Kong's economy.

Mr Liang spoke at the inauguration ceremony of Wong Tai Sin Industry and Commerce Association's 2nd Committee on May 22. He said that the local manufacturing industry has great potential for further development and urged the industry and the Government to work closely together and to make concerted efforts towards the industrial transition.

"In face of the industrial transition, we manufacturers must map out clear and long-term strategies. The Government, on the other hand, should implement policies offering comprehensive industrial infrastructure and back-up facilities, and consult industrialists for their opinions in order to establish a most suitable environment nurturing the transition," said Mr Liang.

As regards to the future development of the manufacturing industry, Mr Liang said that due to the limitation of Hong Kong's resources, the manufacturing sector should make good use of the latest technological development either of Hong Kong itself or of neighbouring countries such as China. Manufacturers should devote efforts in two ways. One is to apply technology in improving production techniques and efficiency, enhancing productivity, product precision and quality assurance, so as to enhance production effectiveness and to increase the value-added content of local products. The other is to apply new technology in product development and product diversification, and to manufacture high-end products so as to consolidate Hong Kong's competitiveness in the international market.

"The ultimate goal and future development trend of the manufacturing industry is to realize the shift from labour-intensive production to technology-intensive production," said Mr Liang.

Mr Liang reiterated his reservation on the comments that the manufacturing industry is on the downward trend, being replaced by the servicing industry, and

that the importance of the manufacturing industry to Hong Kong's economy is gradually shrinking. He said that although recent statistics showed that the number of manufacturing workers has been surpassed by that of the servicing sector, yet it is indeed the result of the booming activities across the border. Early in the late 70s when China first announced the adoption of the open-door policy, Hong Kong manufacturers had well understood the limitations of manpower and land in the territory, and had therefore grasped that opportunity to start moving some of the labour-intensive production processes across the border.

"Through this, Hong Kong manufacturers broke through the physical limitations of Hong Kong in a practical way to further develop the territory's manufacturing industry. China's resources were then utilized, while on the other hand exerting great demand in our supporting services. Moreover, as some production processes moved out of the territory, adequate supply of manpower shifted to the servicing sector. As a result, Hong Kong has achieved such status as Asia's financial centre, China's window, world trade centre, and Asia's and the world's entrepot," Mr Liang remarked.

According to Mr Liang, Hong Kong manufacturers who invest in China not only inject capital, technical know-how and managerial expertise into China, but also offer a lot of job opportunities. These elements are all conducive to China's economic development. At present, about 20,000 Hong Kong plants are operating in the Pearl River delta, employing nearly three million workers. In 1991, the total Hong Kong investments in the delta area amounted to HK\$16.3 billion.

Indeed, there are Hong Kong investments in all areas of China. Of China's foreign investment, two-thirds stems from either Hong Kong or via the territory. Latest statistics showed that in Shanghai, being defined by the Chinese government as a major development area, the total sum of Hong Kong investments has broken through US\$1 billion (about HK\$7.8 billion), ranking the first place and representing one-quarter of the total foreign investments. Mr Liang said Hong Kong manufacturers have played a pioneering role in investing in China and contributed much to the establishment of the close inter-dependent relationship between Hong Kong and China today, especially in terms of economic development beneficial to both places.

Mr Liang believed that entering into the 90s, Hong Kong manufacturers should

not only continue to explore advantageous resources in places outside Hong Kong, but also grasp every opportunity for future development of the manufacturing industry. According to the statistics, local manufacturing output, as measured by the index of industrial production, increased by 1% in the first three quarters of 1991 over the same period in 1990. The value of total exports in 1991 was up by 2%. The growth in value of retained imports of capital goods in 1991 was about 20% in real terms. "These figures reflect the confidence of local manufacturers in maintaining Hong Kong as a manufacturing centre instead of gradually fading out from Hong Kong's economy," said Mr Liang.

## President Speaks at CPPCC Meeting

CMA President Mr Herbert Liang was invited to speak at the monthly meeting of the Guangdong Provincial Committee of the Chinese People's Political Consultative Conference (CPPCC) on May 12.

At the meeting, Mr Liang introduced the efforts made by the Association in lobbying US government for the renewal of China's most-favoured-nation status unconditionally. He further expressed that continual economic co-operation between China and Hong Kong is essential to ensure Hong Kong's future development.

## Investigation on Electrical Appliances Resolved

Last year, subsequent to investigation launched by the US under the Special 301 clause, the US had published a hit list of made-in-China products targeted for retaliation. A substantial portion of the electrical appliances was included in the hit list. The Association had therefore assisted a group of manufacturers producing electrical appliances in China to form an Ad Hoc Committee to deal with the case. Legal consultants were employed and in addition to a written submission to the US Trade Representative Office, representatives of the Ad Hoc Committee also went to Washington to appear at the public hearing to present difficulties and likely impacts on Hong Kong.

The case was subsequently resolved with a settlement agreement between the US and China.

To show their appreciation, CMA President Mr Herbert Liang and CMA executives were invited to attend a get-together luncheon with members of the Ad Hoc Committee on May 28. At the meeting, Mr Patrick Wong, Chairman of the Committee, presented a plaque to Mr Liang to thank the Association for its assistance and support.

## Mongkok Office Relocated

The Association has relocated its Mongkok Office recently. A ribbon cutting ceremony to mark its official opening was held on June 9.

Speaking at the ceremony, CMA President Mr Herbert Liang explained that the expansion of the Mongkok Office is to meet growing demand for services rendered by the Association, especially the origin certification (CO) services in the district. The office is designed to provide a comfortable environment and is at a convenient location for members and clients to employ our CO services. He said that the number of COs issued by the Association continues to increase in recent years and the Mongkok Office ranks top among all CMA CO offices, issuing a substantial portion of the total numbers of COs issued by the Association. The number of COs issued by the Mongkok Office last year was more than double that of the year before. He also said that Mongkok Office is of utmost importance to the overall operation of the Association. The relocation aims at providing more efficient services. The Association is currently providing CO service to the public in major industrial and commercial areas, including Central, Mongkok, Tsimshatsui, Tsimshatsui East, Kwun Tong and Tsuen Wan. Members of the Association can enjoy discounted fees.

At the same time, Mr Liang indicated that the Association has recently established the TCL & CO Services Promotion Committee. The tasks of the Committee are to strengthen the publicity work on the Association's existing services, such as encouraging member-companies to employ CMA's CO and testing services, and to make recommendations to improve and upgrade services so as to provide more efficient and friendly services.

In addition to Mr Herbert Liang, those present at the opening ceremony included CMA Vice-Presidents Mr Leung Nai Wing and Mr Yip Hing Chung; Honorary Presidents Mr Seto Fai and Dr Philip Lai; Executive Committee members Mr Lo Chin, Mr Wong Ping Sai, Mr Yuong Mok Shing and Mr Choi Hin To; General Committee members Mr Leung Chung Lick, Mr Chan Kim Sing, Mr Michael Chan, Mr Edward Wong, Mr Joseph H P Sin, Mr Lam Hok Po, Mr Peter Lee, Mr Lee Chung Chiu, Mr Paul Chu, Mr Chau Chiu Shui and Mr Steve Lau; and Sub-Committee Chairmen Mr Peter Wu and Mr Yim Chan Chee.

## CMA Prevocational School's Annual Ball Games Day

CMA Prevocational School held its Annual Ball Games Day on May 14 at Wan Chai Harbour Road Indoor Games Hall. CMA General Committee member Mr Lam Hok Po presented the prizes. Besides Mr Paul Yin, the School's Supervisor, and Mr Graham Cheng, School Manager, other guests attending the ceremony included CMA President Mr Herbert Liang; Vice-President Mr Tony Chau; Executive Committee members Mr Wong Ping Sai and Mr Yuong Mok Shing; General Committee members Mr Chan Kim Sing, Mr Michael Sun, Mr Jan Thai Lun, Mr Steve Lau and Mr Chow Lam Boon; and Sub-Committee Chairman Mr Yim Chan Chee.

## HK Taxation Training Course

A three-module Training Course on Hong Kong Taxation was organized by the Association from May 20 to 22. Six tax experts from Coopers and Lybrand were invited as speakers of the course, including its Partner Ms Marina Wong; and Tax Managers Mr Jimmy Chung, Mr Edward Shum, Mr Victor Woo, Mr Timothy Wong, Mr Michael Ng and Mr Terry Yuen. Participants were given detailed explanation on the principles, structure and practices of Hong Kong taxation as well as an overview of China taxation.

The aims of the training course were to offer owner-managers and middle to junior management levels with the need to

deal with financial management an opportunity to understand taxation system and its principles in Hong Kong; to establish a well-traced book-keeping system/records and financial planning; as well as to understand the taxation affairs for investments in China.

The first module focused mainly on the laws and practices of Hong Kong taxation, including the introduction of the Inland Revenue Ordinance, the Inland Revenue rules and practice notes, structure of the Inland Revenue Department and the process of objections/holdovers/appeals delivered by Mr Terry Yuen. Mr Michael Ng continued the topics on property tax and stamp duty, and tax efficient remuneration package/retirement scheme/provident fund in respect of salaries tax.

The second module emphasized on business taxation. Mr Timothy Wong highlighted essences of profits tax and the use of depreciation allowances and deductible expenditure. In addition, Mr Jimmy Chung further elaborated on the sources of profits and the principles determining source, types of income, as well as efficient tax planning in respect of off-shore claims.

The third module was regarded as the climax of the training course. Mr Victor Woo explained the objectives and procedures of field audit and tax investigation, and penalties on failure to comply with the Inland Revenue Ordinance. On the other hand, as investment in China is a hot issue, Mr Edward Shum illustrated Hong Kong tax implications on business operation in China in various forms including "sub-contracting work in China for processing and assembly — while factory owned and managed by Chinese party", "sub-contracting work in China under a co-operative agreement", "manufacturing under equity joint venture" and "property development under joint venture". Moreover, Mr Shum explained Hong Kong tax implications on import and export and the various arrangements through which profits could be regarded as sources outside Hong Kong and not subject to tax. Regarding China taxation, Ms Marina Wong introduced income taxes on corporations, income taxes on individuals, income taxes on non-residents and also the industrial and commercial consolidated tax. Ms Wong reminded the participants that taxation policies and assessment of various taxes would be different in various special economic zones.

Response of participants was encouraging.



## CMA Choi Cheung Kok Prevocational School Speech Day

CMA Choi Cheung Kok Prevocational School held its 7th Speech Day on June 2. CMA President Mr Herbert Liang, as the guest of honour, delivered a speech at the gathering and presented certificates to the graduates.

According to Mr Liang, to facilitate the upgrading of local industry and to achieve a smooth transition, efforts must be concentrated on the training of skilled labour. He said, "Industry is the mainstay of Hong Kong's economy. As local industry is transforming from labour-intensive mode of production to technology- and capital-intensive ones, industry must be supported by skills. Investments should be made to provide better manpower training." He emphasized that the workforce needed by local industry today is not only manual labour, but those with skills, techniques and professional knowledge at different levels. He pointed out that one of the CMA's main tasks in the future is to step up training of skilled labour for our industry.

Mr Liang revealed that the CMA Choi Cheung Kok Prevocational School will start offering matriculation courses in the coming academic year. Students of prevocational schools can acquire practical training and be well-prepared for working in industrial and commercial organizations. Now they can also choose to further their studies in universities, similar to their counterparts in grammar schools. He called upon the Government



Guests of honour on stage at the 7th Speech Day of the CMA Choi Cheung Kok Prevocational School

to increase the number of prevocational schools and narrow down the difference between the number of prevocational schools and that of grammar schools.

Finally, Mr Liang asked the graduates to develop their career in industry, inputting the skills, techniques and professional knowledge they acquired in school towards the upgrade and high-tech development of local industry. He also asked them to forsake the unhealthy misconception that the blue-collar ranks inferior to the white-collar.

Apart from Mr Liang, other CMA members attending the CMA Choi Cheung Kok Prevocational School's 7th Speech Day were Honorary Presidents Mr Hung Cheung Pui and Mr Seto Fai; Acting Su-

pervisor of the School Management Committee Mr Patrick Choi; Executive Committee members Mr Lo Chin, Mr Wong Ping Sai and Mr Yuong Mok Shing; General Committee members Mr Leung Chung Lick, Mr Lau Chi Yuen, Mr Edward Wong, Mr Lam Hok Po, Mr Steve Lau and Mr Chow Lam Boon; Sub-Committee Chairman Mr Yim Chan Chee; and members Mr Chan Ming Yee and Dr Liu Han Qin.

## Delegation from CAYRE

A 20-member delegation from The Chinese Association of Young Rural Entrepreneurs (CAYRE), led by its Honorary Chairman Mr Luo Sang, visited the Association on May 14. The delegation was received by CMA Executive Committee members Mr Lo Chin, Dr Lui Ming Wah and Mr Lee Sai Yick; General Committee member Mr Wong Kwai; and member Mr Stanley Chau.

During the meeting, Mr Luo introduced the background and structure of CAYRE. The mission intended to establish a closer connection with Hong Kong manufacturers through the Association and to enhance economic co-operation between China and Hong Kong.

CMA Executive Committee member Dr Lui Ming Wah (2nd from right) receives a souvenir from Honorary Chairman of the Chinese Association of Young Rural Entrepreneurs Mr Luo Sang. Beside are CMA Executive Committee member Mr Lo Chin (left) & Executive Vice-Chairman of CAYRE Mr Han Chang Fu (2nd from left).



## Delegation from Shenzhen

Led by Mr Yu Rong Guang, Vice-Director of the People's Government Economic Co-operation Office in Shenzhen, a ten-member delegation called upon the Association on June 12. It comprised representatives from China's various provinces and cities holding office in Shenzhen and was received by CMA Vice-President Mr Yip Hing Chung.

In the meeting, delegates introduced the latest economic development of the provinces and cities they represent respectively. Mr Yip told the delegation that the Association would organize delegations to various places in China to investigate trade and investment opportunities.



Delegates introduce the latest economic development in the provinces & cities they represented.



Delegation from He Bei District, Tianjin, visits CMA.

## Delegation from He Bei District

A seven-member delegation from He Bei District, Tianjin, visited the Association on June 2. Led by Mr Shi Xiao Cheng, Director of The People's Government, He Bei District, Tianjin, China, the delegation was received by CMA President Mr Herbert Liang.

According to Mr Shi, the aim of the delegation is to establish contacts with Hong Kong manufacturers and to explore co-operation opportunities. Mr Liang told the delegation that the Association would provide all possible assistance to foster co-operation between Chinese and Hong Kong enterprises. Information on investment projects would be circulated to members.

## Employment

### Improvements to Employment Law

The Employment (Amendment) (No. 4) Bill 1992, gazetted and introduced into the Legislative Council in May, contains a number of improvements to ensure that workers will not be unfairly deprived of their entitlements to severance payment and long service payment.

The bill provides that a dismissal may no longer be taken to be by reason of

redundancy where an employer has moved or intends to move the place in which his employee was or is employed from Hong Kong Island to Kowloon or the New Territories or vice versa.) However, if a change of workplace has caused undue hardship to an employee, which is sufficiently severe to establish a constructive dismissal under the common law, or if an employee with no fixed place of employment is dismissed and his dismissal is due mainly to redundancy, the employee is entitled to severance payment.

The bill also stipulates that an employee who terminates his contract of employment because of the employer's misconduct should also be entitled to severance payment, whether or not he has served notice to resign or has given payment in lieu of notice. The bill also proposes to extend the provision of the Employment Ordinance to include employees who have not been provided with enough work or who have been on no-pay sick leave or no-pay maternity leave, prior to their dismissal. Thus, it will cover any employees who have resigned on grounds of ill-health or old age, or who have died in the course of employment.



In addition, the bill clarifies certain provisions in the Employment Ordinance to ensure that an employer will not have to pay double benefits to the same employee upon termination of employment contract. The gratuity or retirement scheme payment and long service or severance payments should be mutually offsetting, and any retirement scheme payment paid by an employer should be reduced by the amount of severance or long service payments made to the employee and vice versa. The bill also provides that where there are different beneficiaries for the two payments, the nominated beneficiary for retirement scheme payment will be entitled to only the amount in excess of any long service payment. Hence, the beneficiary must return any retirement scheme payment, other than any such excess, to the trustee of the scheme who will then pay it back to the employer. To avoid delay by employers in making severance payment to an employee after the Labour Tribunal has ordered such payment to be made, the bill seeks to require the Tribunal to order a time limit for such payment. It also provides that where no such time limit is ordered, the payment must be made within 14 days from the date of the ruling on payment.

## Improvements to Employees' Compensation

To safeguard the interests of workers on employees' compensation and to simplify the procedures for settling minor compensation cases, further improvements have been spelt out in the Employees' Compensation (Amendment) Bill 1992 and the Employees' Compensation (Amendment) (No. 2) Bill 1992. These two bills were gazetted and introduced into the Legislative Council for enactment in May.

The Employees' Compensation (Amendment) Bill 1992 extends the coverage and clarifies certain ambiguities of the provisions under the Employees' Compensation Ordinance. The bill provides for an expanded definition of "employees" and "dependants" under the ordinance.

The bill extends the protection to part-time domestic helpers so that they will also be entitled to compensation in case of injury at work. Employers are required to take out insurance policies for these employees to cover their liabilities for compensation.

In addition, the bill proposes to re-define the term "dependants" to cover not only dependants at the time of the employee's death but also prospective dependants. Hence, "dependants" will include children of the deceased employee born after his death, as well as his parents, grandparents and stepparents who will retire within one year after his death and who are expected to rely on the deceased employee for a living.

The bill also proposes to extend the protection of the ordinance to local employees injured while working for foreign employers outside Hong Kong if the employer agrees to settle the case in a Hong Kong court.



Another proposed amendment is to remove the ceiling of \$28,000 on advance payment that may be made by an employer pending settlement or determination of a claim for compensation. This amendment will encourage employers to advance larger payments to those destitute employees.

The bill also seeks to empower an ordinary assessment board to assess not only the extent of permanent incapacity suffered by an injured employee but also his overall period of absence from duty necessary as a result of the injury. This amendment will facilitate the Labour Department in determining the amount of compensation.

Other improvements proposed include a provision to enable the Commissioner for Labour to cancel the previous assessment of compensation on review when an employee's injury subsequently resulted in permanent incapacity, and to refer the employee to an ordinary assessment board. The bill not only clarifies the "date of issue" in respect of certificates of compensation assessment and assessment of

incapacity, but also stipulates that compensation payable under the ordinance should be subject to legal aid charge. The maximum fines for various offences under the ordinance are also revised so that the same level of penalty will apply to offences of similar gravity.

The Employees' Compensation (Amendment) (No. 2) Bill 1992 provides that an employer may agree with the injured employee on the amount of compensation to be paid in certain cases of temporary incapacity for a period not exceeding seven days. This new procedure of compensation by agreement will save the employee the trouble of claiming compensation, and enable the employer to collect reimbursement of the compensation which he paid to the employee from the insurer more quickly.

The bill also requires an employer to report the work accident and the agreed amount of compensation to the Commissioner of Labour who may review or cancel the agreement under certain circumstances.

The bill also proposes to extend the existing reporting period of non-fatal accidents from seven days to 14 days so as to facilitate the implementation of the new procedure.

## Unemployment Statistics

The latest labour force statistics released by the Census and Statistics Department indicated that there has been some easing in the labour market in recent months.

The seasonally adjusted unemployment rate for 1992 January to March was 2.4%, compared with 1.8% for the three months ending 1991 December and 1.8% for the same period a year earlier.

The number of unemployed persons, adjusted for variations in the number of first-time job-seekers, in 1992 January to March was estimated at 65,700, compared with 51,900 in the three months ending 1991 December and 49,900 in the corresponding period last year.

	1992 Jan-Mar	1991 Oct-Dec	1991 Jan-Mar
Unemployment rate	2.4%	1.8%	1.8%
Unemployed persons	65,700	51,900	49,900

## Industry Affairs

### Study on HK's Plastics Industry

While the last issue of *The Business Journal* summarized the industry-wide findings and conclusions of the *Techno-economic and Market Research Study on Hong Kong's Plastics Industry 1990-1991*, this issue would continue to introduce the strategic industry units (SIUs) — specific findings and conclusions, analysis of international competitiveness as well as overall recommendations of the report.

In compiling the report, the local industry was segmented into nine SIUs based upon a particular industry process or function and which were analyzed individually (Table 1).

#### International competitiveness

The report had analyzed international competitiveness of the plastics industry to suggest in which particular markets Hong Kong enjoyed a good competitive position vis a vis the market bases of competition. It aimed to serve as a reference for the Industry Department to consider various future positioning strategies for Hong Kong.

The report indicated that the market of toys and dolls, by virtue of the strengths Hong Kong had built upon over many decades and its aggressive move into China to maintain cost position, was the only market in which Hong Kong's position was superior. It was suggested to develop higher value-added products, such as educational or electronic toys.

In addition, among the markets that Hong Kong scored above average were furniture, houseware and electrical components, since products in this category were relatively easy to export and did not require local production near customers' factories. However, it was predicted that Hong Kong's position in plastic furniture was likely to decline primarily because many of these products were currently being targeted as an outlet for recycled resins such as polypropylene in the major markets of Western Europe and North America.

The markets in which Hong Kong's position was considered to be average included recreation/sporting goods, appliances, and luggage and telecommunication parts. This category required a high degree of labour assembly, and quick response to changes in market trends, rapid life cycles and innovation/development periods, as well as key customer requirements for responsiveness. On the other hand, luggage was probably a market in which Hong Kong's position had slipped/declined and would continue to do so due to competitive pressures from many low-wage countries.

SIU	Findings	Challenges
Compounding & distribution	Rising space/warehousing costs Movement of customers into China	
Non-electric toys	Unskilled labour shortage Cost competitiveness in Asia Pacific region Almost the entire manufacturing being moved to China	Maintain low-cost production Develop higher value branded/proprietary toys
Electric & electronic toys	Dramatic shift in manufacturing/assembly operations into China	Manage the transfer of more sophisticated processing technology Maintain cost competitiveness Establish own private label or branded product lines
Packaging	Not a large export-oriented SIU With potential for retaining its productive capacity within HK	Range of potential thrusts including barrier resins, co-extrusion, recycling for PET resin, finishing, oriented film & coinjection molding
Houseware	Buyers not to be powerful Assembly intensity & the types of plastic used vary widely	Design & develop a wide variety of new products Continue enhancing its products design skills & international marketing awareness
Electrical components	Many companies being both large manufacturers of their own plastics components & the manufacturers of consumer electrical (plastic) products Large user of higher value plastics Most labour-intensive assembly in China, much of the precision molding of electrical & mechanical components in HK	Develop a more sophisticated & consistent moldmaking industry Require a greater supply of multi-disciplinary skilled technical labour Develop private label & branded design efforts (adoption of ISO 9000 quality standards)
Industrial & construction products	China being the largest market Many companies studying to relocate to China	Understand local regulation of building codes Improve price & cost competitiveness
Moldmaking	Increasing cost/decreasing supply of skilled moldmakers Begin to move to China Highly diverse set of participants in terms of skill & quality levels	Facilitate the movement of simple mold design & construction into China where there is lower labour cost Enhance the minimum & overall levels of quality & reliability provided by the remaining HK moldmakers
Equipment fabrication	Highly focused in HK Quality & sophistication of equipment being perceived to be "mid-market"	Upgrade the overall levels of quality & sophistication in hardware/equipment Maintain cost position through the selective use of China

Table 1: Findings & challenges of nine SIUs

Industrial/building and construction and packaging were only scored as below average category. Both markets were difficult to export/ship economically any great distance. However, if packaging combined food packaging skills with a strong agricultural export position for a particular commodity grown in South China, the situation would be improved. Business machines also scored below average because many customers required component manufacture in their home markets or locally to their primary factories. Hong Kong could improve its position in this market through greater design skills.

According to the report, transportation was the only market in which Hong Kong's position was poor. Manufacturing plastic parts for the automotive sector — where many parts tended to be large/bulky and difficult to ship economically — did not suit Hong Kong well.

#### Recommendations

The report suggested a number of recommendations for the industry and industry participants must select one of the three fundamental strategic options, namely to remain focused with current businesses, to adopt/learn new skills for higher value-added content, as well as to select a niche which protected the business.



ness from broad competitive threats. Among these options, the report recommended the second one as a basic thrust.

In line with this, the report proposed that the Hong Kong Government should implement a technical support program to improve the technical levels/skills of participants, especially for those smaller participants.

It was also proposed that the Hong Kong Census and Statistics Department should redefine its data collection procedures for the plastics industry to provide a better knowledge by the Government and the industry of the on-going trends.

As most companies in Hong Kong faced the problem of shortage of skilled labour, it was advised to hire China-trained engineers as well as to provide their training in Hong Kong. Besides, a system of evaluating the capabilities and quality levels of local moldmakers should be established by the Mold and Die Council, with the objective to monitor and improve — on an individual basis — the performance of Hong Kong's merchant moldmakers.

Another recommendation on labour was that the Government should place greater emphasis upon technical design and development skills in the local universities to educate future engineers for the plastics industry so that the industry could move to higher levels of value-added.

With an emphasis upon design and innovation, the report recommended the Government to work both internally and with other governments to strengthen the current system for product design registration and protection so as to attract longer-term innovative efforts.

The report also suggested that the Industry Department should establish an oversight committee to study and improve effective co-ordination of activities between various support organizations, in order to provide more services to the industry. Moreover, the report recommended the industry to adapt the ISO 9000 standard, especially in product areas such as plastic electrical/electronics products so as to develop the industry along the direction of high value-added and product sophistication.

## Employaid Fund

Funded by the Community Chest and administered by the Hong Kong Society for Rehabilitation, the Employaid Scheme

is set up to provide financial assistance and technical advice to employers who wish to employ disabled persons.

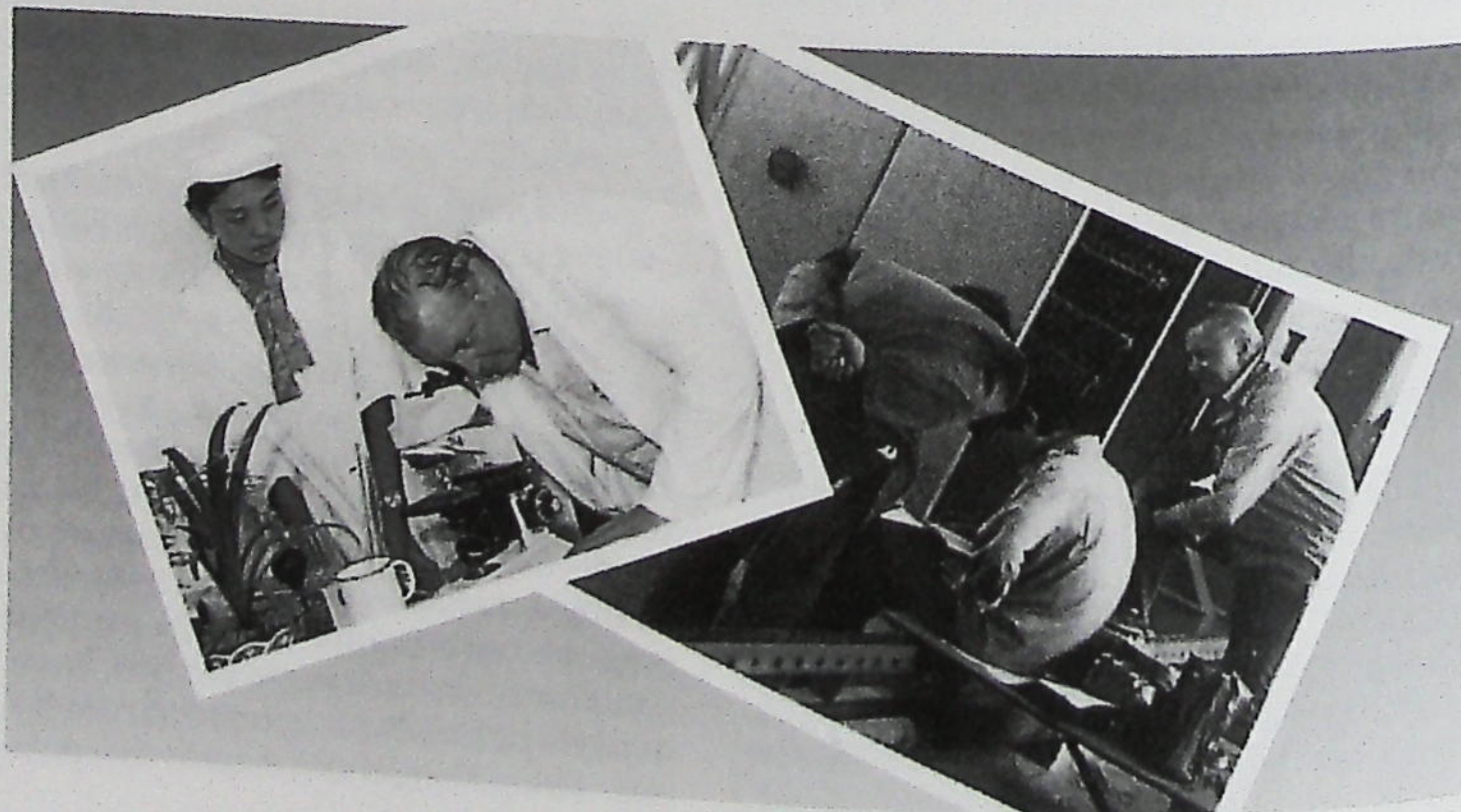
Many disabled persons are well-trained in various trades and professions. Technical advancements have made it possible for the blind to read and type; or for the paralyzed in the legs to operate machines solely with hands. The Employaid Fund makes these special equipment and tools readily available to assist disabled people in reading, writing, operating machinery, measuring and calculating as well as in mobility.

The Employaid Fund assists employers in the following areas:

1. Technical advice: A team of technical advisors will assist the employers to identify their needs and to advise them on the options available.
2. Purchase of equipment: Once the application is approved, the Fund will allow the purchase of the equipment required and the loan to employers for the use of workers.
3. Adaptation to premises and machines: If adaptations to premises and/or machines are required, the Fund will make the necessary adaptations for employers or advise on how such adaptations can be made.

The Employaid Fund services are available free of charge and the equipment will be on loan to employers as long as the disabled workers remain under their employment.

Employers can make an application or enquiry through the Selective Placement Division, or to the Employaid Scheme, the Hong Kong Society for Rehabilitation at 7 Sha Wan Drive, Pokfulam, Hong Kong (tel no. 817 6277).



## Senior Expert Service

The Senior Expert Service (SES), oriented in Germany, is a non-profit organization which mobilizes retired professionals from Germany for domestic and overseas voluntary activities with international co-operation. The Senior Experts' activities cover a wide variety of tasks and are oriented towards quick and pragmatic assistance, predominantly in technical and economic sectors. Education and training of specialist and management personnel and their guidance to achieve self-support are in focus, generally combined with actual problem-solving.

Requests for SES activities are evaluated with respect to aims of development co-operation, degree of know-how transfer, and scope of training involved. The intended contribution to the economic development of the host nations is decisive in the granting of such service.

Prerequisites for processing of a request are clear definition of the task and indication of the assignment goal aimed at. SES clients are in the first place small and medium enterprises and institutions in the assignment countries.

The Senior Experts' assignment age should, as a rule, not exceed 70 years while the assignment duration, on average, is two months and should not be longer than six months. Although the Senior Experts are working on voluntary basis, companies are expected to carry the assignment costs. These comprise costs in the assignment country (board, lodging, transport, and per diem allowance), travel costs, and costs within Germany for assignment preparation and handling.

Members who are interested in this service can contact CMA Assistant Secretary Mr Edwin Lam at tel no. 542 8600 ext 620.

## Town Planning / Infrastructure

### Current News of Planning Department

The first issue of the *Planning Department Newsletter* was released in March. The objective of the publication is to provide an additional means to inform the public of the progress of the work that the Department is currently undertaking, so as to enable them to better understand the process of planning policy formulation and plan preparation. The Newsletter is free of charge and is made available to any members of the public.

According to the Newsletter, a comprehensive review of the territorial development strategy is currently in progress to assess the implications of the proposed port and airport development and the current policies on environment and transport. The changing role of the territory in the context of recent developments in the Pearl River delta region will also be taken into considerations in the review. Upon completion of the review, a framework

for infrastructure provision to satisfy the long-term development needs of the territory, especially in the distribution of population, employment and economic activities will be laid down. Sectoral land use policies for housing, industry, commerce and office, etc. will also be formulated to provide guidelines for future development.

Meanwhile, the Department is also conducting the first review of the port stream of the Port and Airport Development Strategies. It is divided into two phases. The first phase, which involves an updating of port demand forecasts and the translation of these forecasts into port facilities, was completed in mid-1991. The second phase, which aims to revise the Port Development Plan and Program, is expected to be completed by mid-1992.

In order to design our city in a better way, the Department also prepares various planning studies. These included: comprehensive review of special control areas, review of building density and

height restrictions in Kowloon and New Kowloon, North Lantau development study, Lantau Port Peninsula development study, West Kowloon reclamation, Central and Wan Chai reclamation, study on underground development of commercial facilities extending beyond private land, and rural activities area study.

As regards to sub-regional planning, one of the major strategies is the Metroplan Selected Strategy. The Department was preparing the development statements for West Kowloon and Tsuen Wan-Kwai Tsing, in order to provide a basis for action to address land use, transport and environmental problems in the "Old Core Area" of the districts. In 1992 April/May, it was scheduled to commence the South-east Kowloon development statement, which includes the redevelopment of the existing Kai Tak Airport site. Moreover, reviews on North-west New Territories development strategy and South-west New Territories development strategy are under preparation and would be completed around August and late-1992 respectively.

## Environment

### Regulations for Chemical Waste Control

The Waste Disposal (Appeal Board) Regulation, the Waste Disposal (Forms and Fees for Licences) Regulation and the Waste Disposal (Chemical Waste) (General) Regulation have come into effect in May. The first regulation provides for the procedures to be followed and the forms to be used in the making of appeals to the Appeal Board constituted under the Waste Disposal Ordinance (WDO) while the second one prescribes the forms for making an application for a waste collection licence or a waste disposal licence and the renewal of such licences under the WDO and the fees payable in respect of such licences.

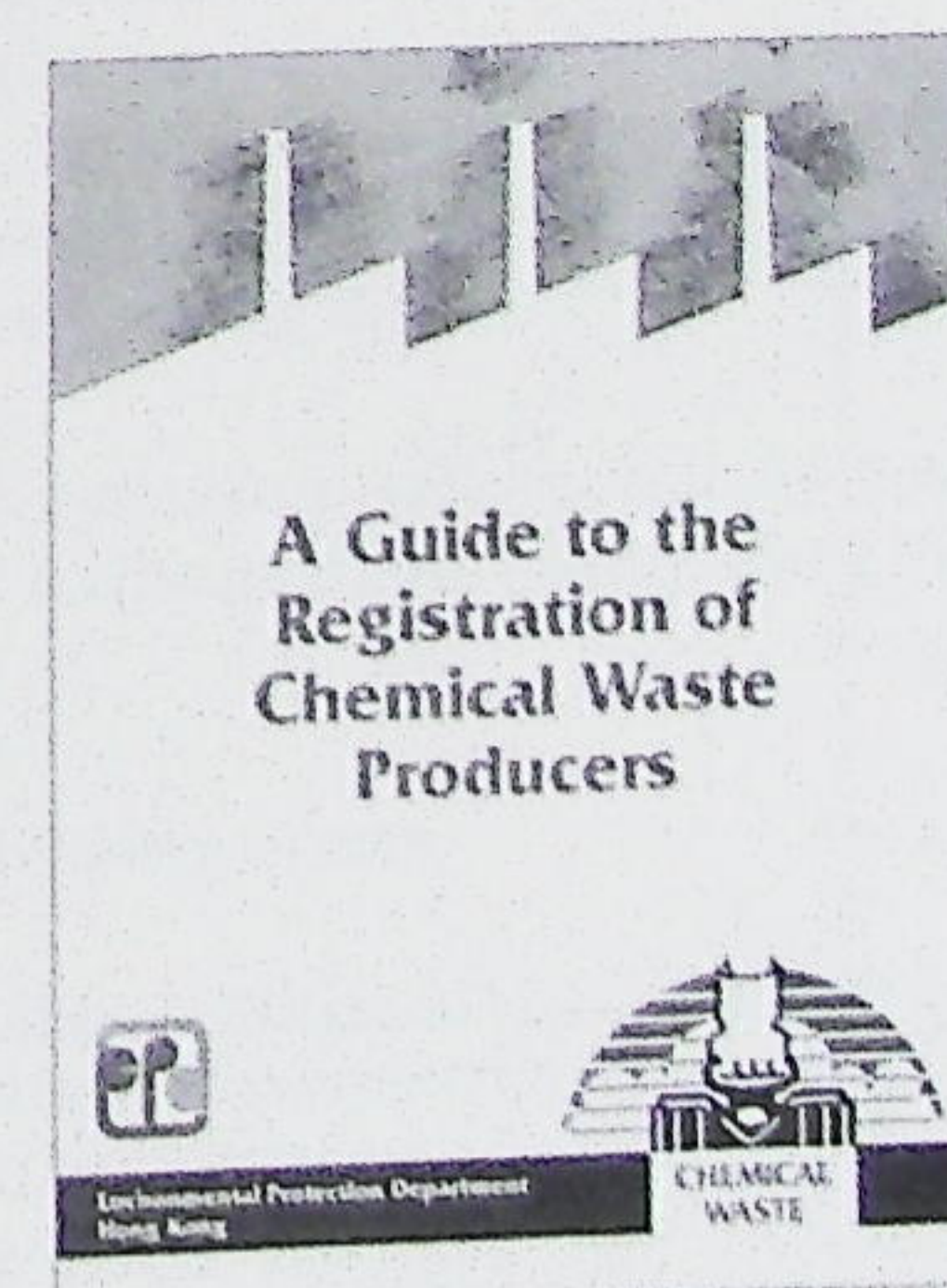
The Waste Disposal (Chemical Waste) (General) Regulation provides for the classification of waste as chemical waste and generally for the control and regulation of production, possession, storage and disposal of chemical waste. Under the regulation, a person shall not produce chemical waste or cause it to be produced unless he is registered with the Environmental Protection Department (EPD).

Regarding disposal, it is stipulated that chemical waste should be properly contained and labelled, and stored in a safe manner prior to collection and disposal. In particular, chemical waste is to be disposed of by delivery to a reception point, or specified site or premises where it is produced if a licence for disposal has been issued in respect of such site or premises. In addition to other statutory requirements, it is also noted that chemical waste shall be safely packed and not be mixed, packed or stored together in a container if there are different types of chemical wastes, and it must be ensured that there is no leakage. Besides, all movements of chemical waste should be accompanied by "trip ticket" forms for monitoring and record purpose. Specifically, these forms should record particulars or information in relation to the production, collection, transportation, reception, transfer, import or export of chemical waste. It should be noted that only licensed waste collectors should transport chemical waste, and treatment and disposal (including reprocessing and recycling) could only be carried out at licensed facilities.

In addition to the above requirements, there are also provisions pertaining to

precautions against dangers to public health and pollution as well as provisions relating to exemptions from the requirements of the regulation, forms to be used, the offence of furnishing false information and the defences available under the regulation.

Failure to comply with any requirements in the regulation is liable on conviction to fine and/or imprisonment. Members are advised to identify the nature of waste generated from the use of chemicals by reviewing available information on the chemicals or by consulting laboratory tests, and check if the waste is classifiable as chemical waste by reference to the EPD guidance booklet *A Guide to the Registration of Chemical Waste Producers*. Copies of the booklet and registration form are available from any EPD Office.





## Economy

### Industrial Production for 1991 4th Quarter

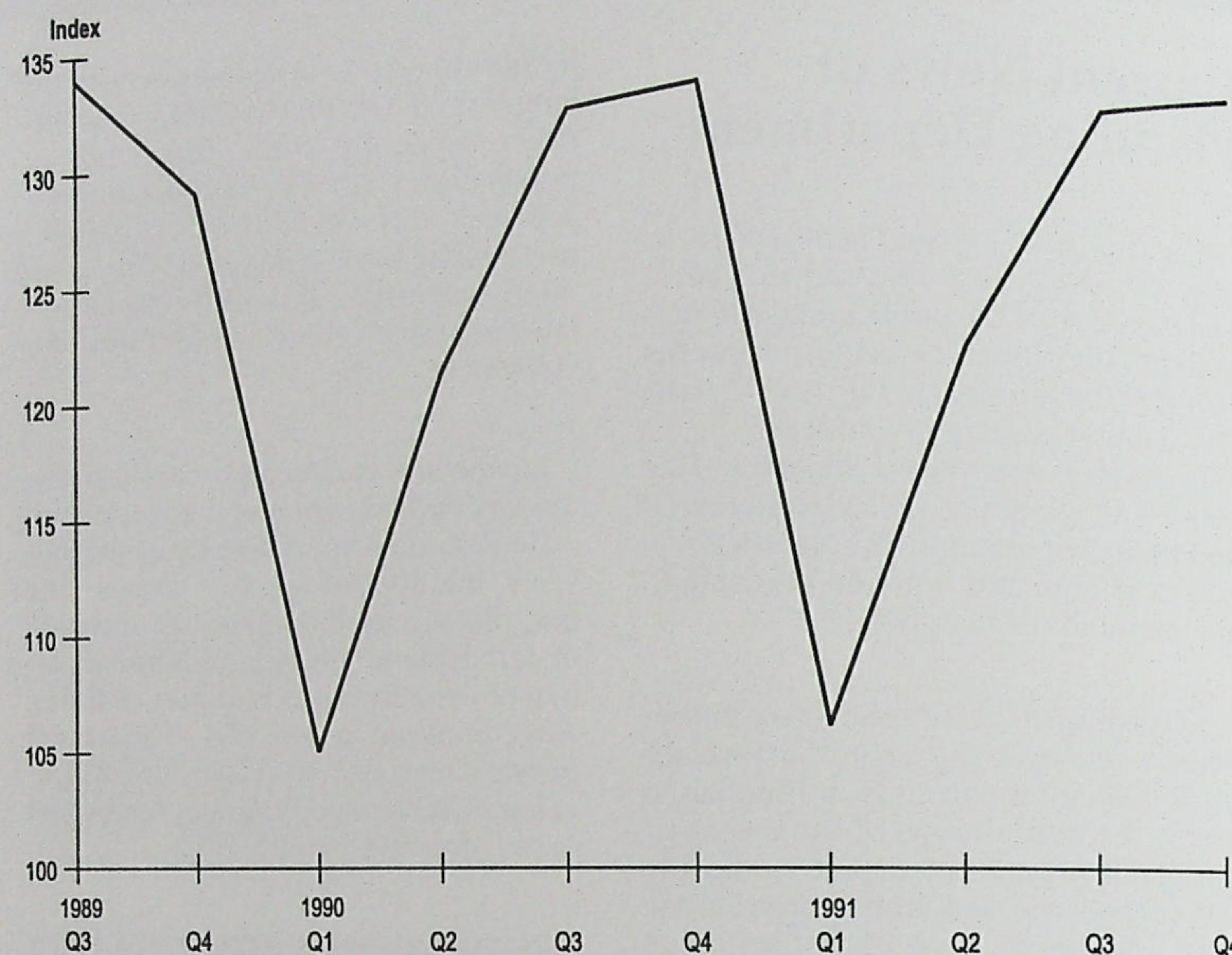
According to the latest issue of the *Report on the Quarterly Index of Industrial Production* released by the Census and Statistics Department, the index of industrial production for the fourth quarter of 1991 was at 134, 0.8% higher than that for the fourth quarter of 1990. Because of seasonal factors, the index was 1.5% higher in the fourth quarter of 1991 than in the preceding quarter.

Taking 1991 as a whole, a significant increase of 10.4% in production was recorded in the broad industry group of paper products and printing over the preceding year. Followed by the textiles (including knitting) industry with an increase of 4.3%.

On the other hand, a drop of 5.6% in production was found in the broad industry group of chemicals, rubber, plastic and non-metallic mineral products; and a fall of 3.6% in the wearing apparel (not including knitwear and footwear) industry.

When compared with the same quarter of 1990, significant increases in production were also recorded in the broad industry group of paper products and printing and in the textiles (including knitting) industry, at 11.3% and 9.5% respectively in the fourth quarter of 1991.

On the other hand, significant decreases in production were found in the wearing apparel (not including knitwear and footwear) industry and the broad industry group of electrical and electronic prod-



Quarterly indexes of industrial production for all manufacturing industries (1986=100)

ucts, professional equipment and optical goods, at 8.1% and 2.5% respectively.

The index of industrial production is primarily intended to reflect the changes over time of local manufacturing output in real terms.

### CPI in 1st Quarter

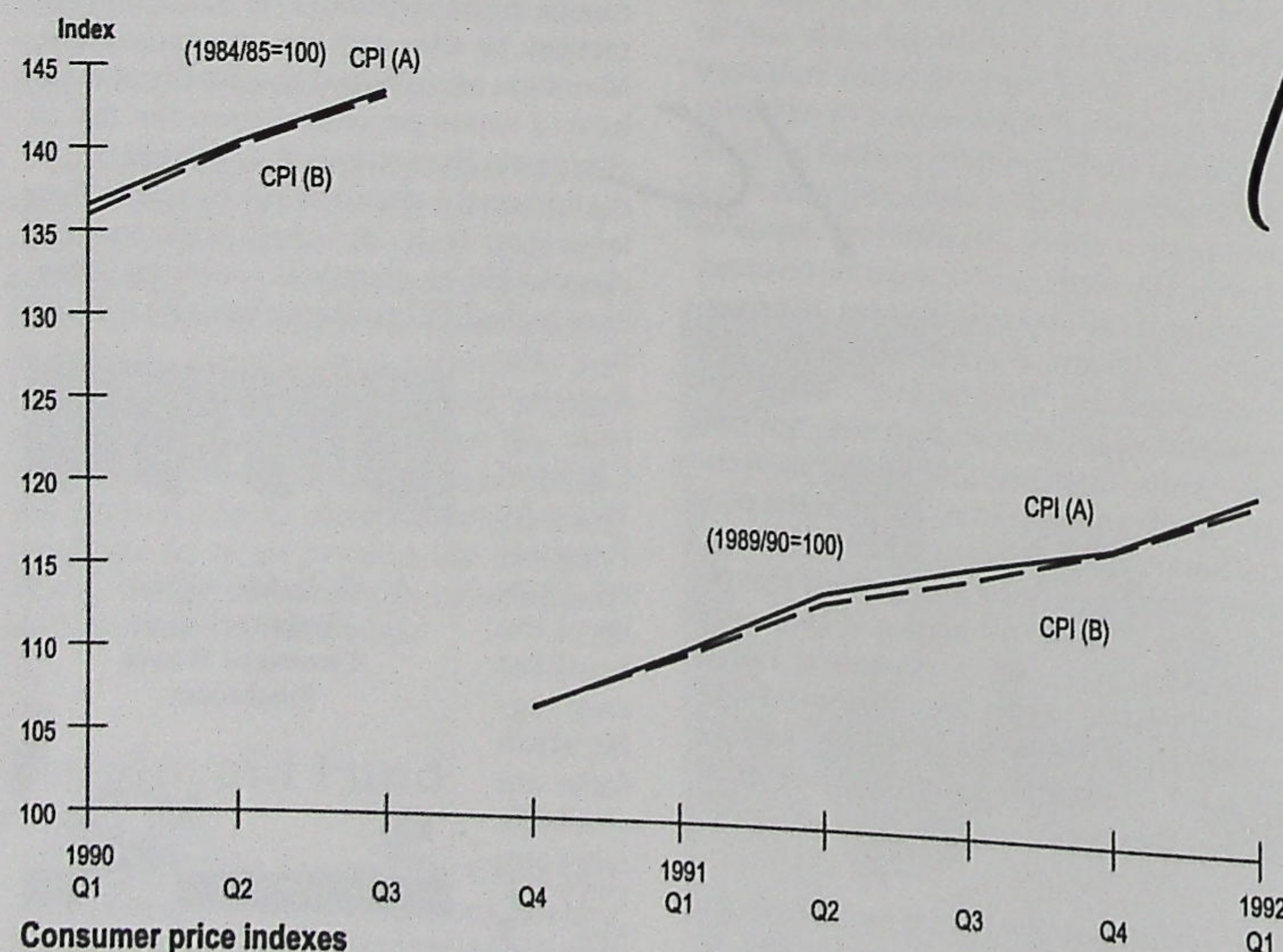
The averages of CPI(A) and CPI(B) for the first quarter of 1992 on the 1989/90 base were 121.3 and 120.8 respectively, representing increases of 3.1% in CPI(A)

and 2.7% in CPI(B) over the fourth quarter of 1991.

Significant increases in Consumer Price Index (CPI) over the fourth quarter of 1991 were recorded in foodstuffs, of 4.7% in CPI(A) and 4.4% in CPI(B). This was mainly due to higher prices of fresh vegetables, fresh sea products, fresh fruit, pork and live poultry around the Lunar New Year, and higher charges for meals at restaurants and other eating places. Fuel and light showed increases of 3.2% in CPI(A) and 3.1% in CPI(B) as a result of higher prices of liquefied petroleum gas and the effect of recent increase in the charges for electricity and town gas. Owing to higher rent for some private housing units and the rental increases in some Housing Authority estates, housing category showed moderate increases of 2.9% for CPI(A) and 3.0% for CPI(B). Besides, other items showing increases included alcoholic drinks and tobacco, services, transport and vehicles, durable goods and miscellaneous goods.

On the other hand, clothing and footwear category recorded decreases of 2.1% for CPI(A) and 2.7% for CPI(B). It was mainly due to lower prices of outer clothing as many department stores and fashion shops were on sale during that quarter.

CPIs are approximate measures of inflation rate of the economy. They give indications to the consumption and expenditure pattern of local population and are useful as reference for a variety of purposes including the setting of salary adjustment, price mark-up, etc.



Consumer price indexes

## Investment Profile

### Honduras

Honduras, approximately 1,000 miles southwest of Miami, has a population of nearly five million, with 10% of the people living in the capital city of Tegucigalpa, and another 10% living in the San Pedro Sula area, where substantial industrial growth is taking place. People in the country speak Spanish while English is widely used as second language. Honduras has a stable democratic government which takes a very active role in encouraging foreign investment.

#### As offshore manufacturing site

Honduras has ample skilled labour of competitive wages. Availability of special technical and vocational programs as well as on-the-job training renders Honduras the country with the highest productivity in the Caribbean region. A high percentage of the management personnel have attended universities abroad, which ensures that they are bilingual and that there is an effective integration of local and international business practices. Among the US Caribbean Basin Initiative (CBI) countries, the property rental rates and electricity rates of Honduras are the lowest, costing only US\$0.25 (about HK\$1.95) per sq ft per month for building space and US\$0.4 (about HK\$3.12) to US\$0.6 (about HK\$4.68) per kilowatt hour respectively. According to the inspired government policy, foreign investment can be granted tax holiday, while financial support is available through private banks with generous collateral require-

ments. Besides, Honduras possesses the best port facilities in Central America and sophisticated telecommunications linking systems with many cities in the world.

#### Dynamic growth sector

Due to its close tie with the US market, Honduras enjoys many favourable trade terms and results in great margins for growth in manufacturing industries particularly in apparel, footwear, pharmaceutical, electronics and furniture sectors. Honduras hosts some of America's most successful apparel manufacturing, producing brand-name items in fashion wear, lingerie, sports wear and casual wear. The apparel industry has tremendous potential for expansion due to the combination of inexpensive and experienced labour, a solid managerial base, and quota access to the US which are well in excess of current Honduran output.

#### New industrial capacity

##### Free trade zones

To support the perpetual development of industrial area, the government has designated six cities as free trade zones (FTZs). They are La Ceiba, Tela, Choloma, Puerto Cortes, Omoa and Amapala in the vicinity of the largest industrial city, San Pedro Sula. Individuals are permitted to construct buildings in any of those six cities, obtaining the free zone status, as long as the building is totally fenced, has 24-hour security and is controlled by the Honduran Port Authority. Companies



Honduras hosts some of America's most successful apparel manufacturers, producing brand-name items in fashion wear, lingerie, sports wear & casual wear.

operating in the FTZs can enjoy duty-free importation and exportation of all production machinery equipment, office supplies, raw materials and spare parts. No federal, state or local income, sales or corporate taxes are levied and total repatriation of currency is permitted.

Complexes established in the FTZs provide rental spaces in preconstructed units of 2,400 to 20,000 sq ft. They are well-equipped with water, power and communications facilities. Security, waste collection and cleaning services, legal services and in-house customs are also available.

Other investment incentives in the FTZs include:

1. Unrestricted currency conversion;
2. Procedures for clearance of import and export shipments are simplified to less than one day with minimum documentation;
3. Low-cost skilled and unskilled labour;
4. Ample supply of trainable and productive labour;
5. A wide range of low cost, local raw materials such as wood, cotton, textiles, fruits, sugar, vegetables, meats, seafood, leather, coffee, cocoa and spices for processing and manufacturing industries; and
6. Many Honduran products may enter the US without duty under the US CBI.

#### Export processing zones

In 1987, the Honduran government passed legislation permitting the establishment of export processing zones (EPZs). The EPZs are privately owned and managed by private entrepreneurs.



Puerto Cortes of Honduras is the only deep water port in Central America, & one of the region's largest & best-equipped ports.



At present, there are seven EPZs scattered in the peripheral of San Pedro Sula, including Bufalo, Choloma (four), La Lima and Villanueva. The EPZs enjoy the same range of privileges of the FTZs.

#### Laws for exporting companies

The Temporary Import Law is applicable to companies operating outside the designated free zone areas but exporting 100% of total production to markets outside the Central American region. Qualifying companies can import the equipment and materials required for manufacturing, free of import duty. Income tax exemption for up to ten years can also be obtained. However, city taxes and export taxes must be paid. (Export tax is 1% of invoice value.)

Regarding the corporate legal framework, total foreign ownership is acceptable under Honduran law. Joint venture

corporations organized in Honduras can take any of the following forms: Sociedad Anonima (Corporation), Sociedad Anonima de Capital Variable (Corporation, the only type of legal framework under which a corporation can buy back its own stock), and Sociedad de Responsabilidad Limitada (Limited Partnership).

#### Business promotion

There are many agencies which are promoting exports, trade and investment including:

1. USAID — the US Agency for International Development provides technical assistance and credit for the development of EPZs;
2. FIDE — Foundation for Investment and Development of Exports provides technical services to promote industrial investment and exports;

3. FEPROEXAAH — promotes agricultural exports and joint ventures;
4. HAMCHAM — Honduran-American Chamber of Commerce; and
5. ANDI — National Industrialist Association.

#### Investment

Honduran businessmen and workers have an excellent reputation in export production. However, its success is enriched by the contribution of the US, European or Asian investors in realizing the common target — investment for profit.

For more information, please contact Consulado de Honduras at 1303 Pacific House, 20 Queen's Road Central, Hong Kong or at tel no. 522 6593.

(Source: Consulado de Honduras) □

## Trade News

### Taiwan: CO Requirement on Textiles & Clothing Imports

The Trade Department has been informed that Taiwan's certificate of origin (CO) requirement for textiles and clothing products is extended to cover all such imports irrespective of country of origin with effect from 1992 June 15.

Under the revised arrangements, imports from Hong Kong have to be covered, with immediate effect, by COs issued by the Trade Department or any of the Government Approved Certificate-Issuing Organizations including the CMA.

Enquiries on the requirement can be directed to Trade Department at tel no. 398 5447. For details on CO services, please contact CMA Assistant Secretary Mr Stanley Au Yeung at tel no. 542 8600 ext 602. □

### Statistical Review of Tourism

A *Statistical Review of Tourism 1991* has recently been published by the Hong Kong Tourist Association (HKTA) and is now

available for sale at HK\$100 per copy.

A *Statistical Review of Tourism* is an annual publication produced by the Research Department of the HKTA. It lists comparative figures for visitor arrivals, visitor characteristics, tourism receipts, hotel statistics, airline statistics and overseas travels by Hong Kong residents.

For enquiries or purchases, please contact the Research Department of the HKTA at tel no. 801 7389. □

### Global Business Opportunities Convention

The Global Business Opportunities Convention 1992, organized by the Osaka Chamber of Commerce and Industry, will be held in Osaka from October 19 to 22.

Participants can take part in the Business Matching Program; business talks on trade, investment, joint-venture, technical tie-ups, etc. between overseas and Japanese companies will be arranged. Hong Kong companies are welcome to set booths to introduce their businesses. In addition, businessmen can also attend seminars and workshops to acquire the latest information on future business trends and opportunities. An industry-wide forum will be organized for partici-

pants from around the world who are engaged in the same industries to discuss their common concerns.

Members who would like to receive further information on the event can contact CMA Assistant Secretary Mr Edwin Lam at tel no. 542 8600 ext 620. □

### HK Computer Conference

Organized by the Hong Kong Computer Society, the Hong Kong Computer Conference '92 was held on May 12. Mrs Anson Chan, Secretary for Economic Services, officiated at the opening ceremony and addressed the delegates.

The theme of the conference is "IT — a Tool, a Burden or a Challenge?" Mr John Strickland, Executive Director Services of Hongkong Bank and an experienced professional in the local information technology industry, delivered the keynote speech.

In the past 13 years, the conference has established itself as an information technology forum in the territory. Each year with the support of more than 600 delegates coming from the Government, private organizations and tertiary institutes, the conference helps promote the development of information technology in Hong Kong. □

## China / US / HK Trade Relations

### Report on Sino-US Trade Matters

#### MFN developments

The general expectation is that US President Bush will act in early June to extend China's most-favoured-nation (MFN) status without imposing any conditions for another year. It appears possible that efforts would be made to block or condition this year's extension from members of the Congress.

However, the efforts to pressure China on a variety of issues have not concluded. The Congress has started to investigate China and drug-related issues. Contacts in the Office of Representative Nancy Pelosi (Democrat, California) indicate that she is attempting to formulate a bill that might be introduced by early June, which would continue the effort to use MFN treatment of China as leverage to force China to change its policies regarding human rights, prison labour and weapons sales. Indications are that Representative Pelosi's thinking may differ from the recently failed legislation by attempting to target products of China's state-owned enterprises and by establishing phased reduction in MFN's tariff benefits, rather than an all-or-nothing approach. Another source, in the House Foreign Affairs Committee, indicates that Representative Don Pease (Democrat, Ohio) is working with Representative Pelosi. He said that while they are discussing targeting state enterprises in a bill, they are considering a number of other ideas and their thinking on this matter is still very fluid.

It is predictable that for some period of time there will be threats in Congress of trade-limiting actions directed at China. Various types of trade sanctions have been a major tool used by US domestic forces concerned about conditions in other countries (such as the Soviet bloc countries and South Africa) and about bilateral US balance-of-trade deficits.

#### US-HK Policy Act

On May 7, the Senate Committee on Foreign Relations approved unanimously an amended version of the US-Hong Kong Policy Act of 1992 introduced by Senator Mitch McConnell (Republican, Kentucky).

The amended bill has been changed in a number of ways to eliminate any concern that the US was acting as a party to

the Joint Declaration with rights to enforce its terms. Instead, the purpose of the bill is now described in terms of the US President's support for the policies and decisions reflected in the Joint Declaration, US' interest in the role of Hong Kong in the world economy, US' support for democratization, and US' support for human rights. Rather than asserting an interpretation of what is provided under the Joint Declaration, the revised bill directs actions based on the provisions of the Joint Declaration "where applicable". The bill no longer states Congress' understanding that the Hong Kong Special Administrative Region will be vested with executive, legislative and independent judicial power, including the power of final adjudication.

The amended bill does not require the Secretary of State's report to Congress to focus the issue on "the degree to which the Joint Declaration is being implemented in Hong Kong"; but it is to cover issues "of interest to the US," such as US-Hong Kong relations, "developments related to the change in the exercise of sovereignty over Hong Kong affecting US' interests", "the development of democratic institutions in Hong Kong", and the extent of Hong Kong's participation in multilateral forums.

Perhaps the most important change is that in Section 201 the amended bill would give the US President specific authority by Executive Order to terminate the continued application of any domestic law of the US to Hong Kong. The bill further provides in Section 202 that in making any such determination the US President "should consider the terms, obligations and expectations expressed in the Joint Declaration with respect to Hong Kong". The effect of these provisions is to give the US President flexible authority to terminate specific laws that treat Hong Kong different from China if the US President determines that Hong Kong is no longer sufficiently autonomous to justify such different treatment.

The bill has now been reported out by the Committee; it has been placed on the Senate floor calendar and is ready for action by the full Senate. Supporters of the legislation predict quick Senate action, but it is not possible at this point to predict whether and when the full Senate might take the matter up. In the House of Representatives, there has been no committee consideration of such a bill, so it is hard to predict either what the bill will look like when it is reported out of committee or when it might come to a vote on the floor of the House. While an Admin-

istration representative stated at the 1992 April 2 hearing before the Sub-Committee on East Asian and Pacific Affairs of the Senate that the Bush Administration supports the goal of Senator McConnell's bill, the Administration has not yet taken an official position on the McConnell revised bill.

#### Violations of US customs laws

As the first product of a major investigation of fraud in the export of textiles from China to the US, the Bush Administration on May 6 announced the indictment of several companies and individuals. In the past numerous charges have been made that China is engaged in transshipping a large amount of textiles through other countries to avoid US quota limitations. The Bush Administration, in response to congressional and other charges about customs fraud in China's exports to the US, has initiated an aggressive investigation of these practices. In September and December of 1991 a large number of search warrants were executed in the US in a search for evidence of customs fraud.

The indictment announced on May 6 contains criminal charges against several Chinese companies and individuals, two US import companies, and three individual US residents. While many of the allegations made by critics of Administration policy have focused on quota violations and transshipments of goods, the indictment does not allege such violations. Instead, it alleges that the defendants underrepresented to US customs the value of merchandise imported into the US and thus underpaid duties owed to customs. The indictment also charges that some of the defendants violated US tax laws by hiding commission income earned by US corporations. The defendants face fines and imprisonment if convicted.

The indictment was announced one day before a hearing into customs fraud by a House of Representatives Sub-Committee. At that hearing, Representative Alex McMillan (Republican, North Carolina) — based on a written statement submitted by Seth Bodner of the US National Knitwear and Sportswear Association — pressed witnesses as to whether Hong Kong was involved in transshipping textiles from China. The position of US customs representatives was that the bulk of transshipments have been through Pakistan, Malaysia, Taiwan, Panama and Honduras. Thomas Gray (the Senior US Customs Representative in Hong Kong) indi-



cated that US customs has evidence of instances where "Made in Hong Kong" labels (or other false country-of-origin labels) were put on goods from China which were shipped through Hong Kong. However, he said that the Hong Kong Government is giving the US full co-operation in eliminating textile fraud, better than any other government.

### USTR Section 301 negotiations with China

The US Trade Representative Office's (USTR) sixth round of the Section 301 discussion with China on import barriers had been completed at the end of May.

## Market Report

### A Guide to Exporting Textile Garments to Japan

With no quota restrictions, low tariff and a decline in local production, Japan's imports of garment has been rising in recent years. In 1991, Japan imported an estimated US\$8.9 billion (about HK\$69.42 billion) worth of garment and ranked as the third largest importer in the world after the US and Germany.

#### HK's clothing exports to Japan

##### Domestic exports

Since 1988, clothing has been the leading category in Hong Kong's domestic exports to Japan. It accounted for a 22% share in 1991. Japan ranked as the 6th largest market for Hong Kong's clothing, accounting for HK\$2,513 million or 3.4% of its domestic exports of clothing. During the late 1980s, domestic exports of textile clothing to Japan experienced very strong growth as the value of exports rose from HK\$806 million in 1986 to HK\$3,332 million in 1989. During both 1990 and 1991 however, these exports declined whereas re-exports continued to increase. This was because many Hong Kong manufacturers previously supplying the Japanese market switched their production to China.

Major categories of exports included suits and coats (accounting for 31.6% in 1991), sweaters (30.0%), shirts (6.5%), blouses (6.3%), trousers (5.0%), and skirts and dresses (4.8%). Those categories

One source in the Administration indicated that the US will not insist on completing these negotiations by June, if these discussions are not complete by then, the deadline will be extended to October. He also indicated that the two countries have not narrowed the scope of the issues between them.

In other action, the USTR recently identified Taiwan, India and Thailand as "priority foreign countries", a designation defined under US Special 301 law to mean those countries whose perceived failure to protect intellectual property rights have the greatest impact on US trade potential. This is the first year Taiwan has been

which experienced high growth last year included shirts (+54%); briefs, panties and knickers (+25%); swimming suits (+212%); overalls and pinafores (+11%); and raincoats (+31%).

Wool and cotton were the most popular types of fabrics used, accounting for 27.1% and 21.5% of total respectively. Other materials included leather (19.5%), man-made fibre (15.8%), and silk (7.7%). Cotton was the only category which recorded significant growth rate (+14%) last year.

##### Re-exports

Clothing was also the largest category in Hong Kong's re-exports to Japan, accounting for 24% of the total in 1991. Re-exports of clothing to Japan has been growing faster than domestic exports since the 1980s. By 1991, re-exports which increased by 18% to HK\$7,235 million, was almost triple the size of domestic exports. The vast majority of re-exports (97%) was of China-origin.

Major categories of re-exports included sweaters (33.6%), shirts (12.4%), trousers (11.5%), suits and coats (11.0%), and skirts and dresses (5.0%). Some categories recorded very high growth rates in 1991, e.g. sweaters (+28%); shirts (+21%); skirts and dresses (+48%); gloves (+36%); briefs, panties and knickers (+72%); raincoats (+263%); and swimming suits (+153%).

In terms of materials, cotton continued to be the largest category (43.6%), while wool (23.3%) and man-made fibre (20.0%) also accounted for significant shares. Except silk, all categories recorded high growth rates last year.

identified as a "priority foreign country", reflecting the Bush Administration's willingness on trade matters to deal aggressively even with countries with which the US has close and friendly relations. The US had been negotiating with Taiwan on trade matters, particularly computer software piracy, and was not satisfied with the remedies proposed by Taiwan. The USTR must announce within 30 days whether it will initiate an investigation of Taiwan's practices. These steps are further indications that the US is likely to be engaged in pressuring China on trade matters for a long period of time.

(Source: Pettit & Martin — Consultant to the CMA)

### Market size & imports

#### Total market size & imports

The total market size of garment in Japan increased by 4% in value terms to ¥4,674 billion (about HK\$280.44 billion) (at ex-factory prices) in January to November of 1991. Domestic shipments amounted to ¥3,520 billion (about HK\$211.2 billion) and imports ¥1,154 billion (about HK\$69.24 billion). This gave domestic production an approximate 75% share of the total market, while imports enjoyed a share of about 25%. The share of imports has increased significantly since 1987 when it stood at 12%. The share of imports is likely to increase even further, given the strength of the yen against other currencies and rising production costs within the country pushing an increased number of brand manufacturers to farm out production to overseas sub-contractors.

#### Imports by product category

The category holding the largest share of imports in 1991 was T-shirts, shirts and blouses with a value of ¥223 billion (about HK\$13.38 billion) which accounted for a 19.3% share. The two categories of sweaters and coats, also had significant shares of the total at 17.5% and 11.1% respectively. As far as larger groupings were concerned, outer garments had the largest share, with 84.1%. Underwear/nightwear posted a 4% share and accessories held a 11.9% share of total garment imports.

#### Imports by material

Cotton was the most popular material used in Japan's garment imports, accounting for 34.6% of the total. Man-made

fibres (22.4%) and wool (17.1%) continued to be the second and third largest category respectively. Meanwhile, the relative importance of leather (11.3%) and silk (4.3%) garments have somewhat declined in the past year after experiencing very strong growth in the late 1980s.

#### Major sources of garment imports

China replaced the Republic of Korea as the leading supplier to the Japanese market for imported garment in 1991, accounting for a 35% share of the total imports. The shift was mainly due to decreased price competitiveness in Korea, and the improvement in workmanship and quality control in China. There are six leading sources (i.e. China, the Republic of Korea, Italy, USA, Taiwan and Hong Kong) of garment imports in Japan, which together accounted for 85% of total imports.

#### HK's share of garment imports

In Japan's imports of garments, Hong Kong accounted for a share of 3.9% for the first eleven months of 1991. This share has been declining since 1989 when it was at 5.4%. According to trade sources, this decrease in market share can largely be attributed to the switching of production facilities to China.

#### Distribution system

Most domestic manufacturers sell almost all of their products through the large wholesalers, while a small number of manufacturers sell their own brand products. The latter are called "brand manufacturers". About 71% of the total market sales are ordered from the domestic manufacturers by the wholesalers.

Imports accounted for about 25% of the total market size. Of this, approximately one-quarter, or 7% of the total market is imported directly by the wholesalers. The majority of imports are conducted by importers who in turn sell to wholesalers and retail outlets. About one-tenth of the imports is channelled from overseas manufacturers to Japanese retail outlets directly.

An increasing number of large retailers have been importing directly from overseas manufacturers in recent years. Due to their buying power, these large retailers do not have to deal with intermediaries for the purchase of garments. In some cases a large-scale retailer would employ the services of a wholesaler, but in such instance the wholesaler can be regarded as an outside purchasing department of the retailer. In many cases, garments are sold under the brand name of the importer or retailer of

the product and the garment manufacturer functions as a sub-contractor.

About 90% of the total market passes through the wholesaler route. This share figure however has decreased from 94% in 1987. The principal cause of this shift is the increase in direct sales (mainly via importers) to retailers. This trend is most evident amongst overseas high-end garment manufacturers. Some Hong Kong fashion brands have tied up with major Japanese distributors to penetrate the market.

#### Importance of Tokyo & Osaka

Tokyo and Osaka are the most important distribution centres of garment in Japan. In regards to high-end products, Tokyo is the fashion centre of Japan. However, for garment manufacturers which are not focusing on the high-end market, Osaka must be regarded as equally important.

#### Japan's import regulations

In recent years, clothing may enter Japan freely and is not subject to import quotas and no changes have been made in Japan's import regulations on clothing. Japan maintains a multi-column tariff with rates classified under "General", "GATT" (General Agreement of Tariff and Trade), "Preferential" (General System of Preferences (GSP)) and "Temporary". For the purpose of duty assessment, a Preferential rate (for GSP beneficiary countries only) is applied before a GATT rate, a GATT rate (for member countries only) before a Temporary rate, and Temporary rate before a General rate. However, if a GATT rate is not lower than the other rates, the rate applicable is the Temporary rate.

Hong Kong and China are beneficiaries of Japan's GSP which provides for preferential treatment of clothing imported into Japan. However, there are global ceilings which are open for utilization by all preference-receiving countries and are basically administered on a first-come, first-served basis. After the preferential ceilings are reached, the Temporary rate will apply. There is also a maximum-country-amount system which restricts individual beneficiary countries from importing more than one-fourth of the ceiling at preferential rates in a fiscal year.

#### Safety regulations & quality requirements

##### Safety regulations

Japan has only a few safety regulations for clothing. Garment manufacturers are

mainly governed by the "Law Concerning Registration of Household Goods Containing Harmful Materials". Manufacturers must not use formaldehyde- or dieldrin-treated fabrics which are harmful to skin. In addition, there are restrictions on the use of fluorescent bleaching materials in garments which come in contact with the skin, particularly for items used for babies. The restrictions apply to the initial processing of garments.

##### Labelling requirements

Labelling of country of origin is not required by law. However, in order to protect the interests of consumers, all garments regardless of price and place of purchase, must have labels clearly indicating the quality and necessary handling methods, such as restrictions on washing and dry method. For imported garments, the labelling responsibilities fall on the importers or distributors.

#### Recommendations

##### Importance of face-to-face negotiations

Face-to-face negotiations is an important aspect of Japanese culture which cannot be overlooked. Any effort to facilitate these negotiations, such as the use of Japanese speaking personnel, would be a step in the right direction. Besides, before talking about price, Hong Kong exporters should explain their factories' operations in detail, such as machine, yarn, fabrics, capacity, minimum lot, etc. Japanese buyers want to know such information before starting business. The negotiation process may take a long time, therefore, exporters should not hesitate to make second or third calls.

##### Price competitiveness

Hong Kong exporters should make efforts in the area of price competitiveness. They should note that some other countries enjoy an advantage, relative to Hong Kong, because of the competitiveness of their prices. If price quotation is required, exporters had better quote the best price as accurately and as early as possible. Otherwise, the Japanese buyer would consider the exporter as non-professional.

##### Customer requirements

Hong Kong exporters should also pay close attention to customer requirements in such areas as quality, design and delivery time. The Japanese are extremely astute and demanding at all levels of consumption. In order to increase market share, exporters should be sensitive to these issues.



## Clarify trade perceptions

It is better for Hong Kong exporters to conduct market research targeted at clarifying trade perceptions at the importer, wholesaler, and most importantly, the retailer levels, in regard to Japan's imports of garments from Hong Kong. By clearly distinguishing such things as problem areas, unmet needs and specific product requirements, garment exporters can more accurately and efficiently focus the use of their resources in order to gain more gratifying results.

(Source: Hong Kong Trade Development Council)

## Spain: Market Prospects & Investment Environment

With 39 million inhabitants, Spain is the fifth largest country in the European Economic Community (EEC) both in terms of population and size of the economy. Spain joined the EEC in 1986, a move intended to integrate itself more closely with Western Europe. This has set the momentum for opening up the Spanish economy. It has enjoyed sustained economy with increased foreign investment and private consumption. Although GDP growth is estimated to have slowed down to 2.6% last year from an annual average rate of 4.5% during 1986 to 1990, a recovery is underway. It is expected to expand to 3.6% in 1992. In the meantime, the high rate of unemployment has continued to fall, while inflation hovers at a relatively low level.

Beginning in 1986, Spain has brought about a reduction in import barriers. As a result, import duties have been lowered in general, and Spain will apply the Common Customs Tariff (CCT) rates in full by 1993. Also from 1986, Spain started to apply the EEC General System of Preference (GSP) gradually with an aim of adopting the scheme in full by 1996.

Most products can now be freely imported into Spain. With respect to textiles and clothing, imports previously regulated by global quotas have been replaced by the Hong Kong EEC Textiles Agreement upon the accession. The global quotas for other Hong Kong products have likewise been abolished; the residual quotas on imitation jewellery, travel goods and handbags, video tape recorders, loudspeakers, amplifiers, sound recorders and reproducers, electrical apparatus for cir-

cuits, dolls, etc. were removed at the beginning of 1992, and this will likely boost sales of these products.

Hong Kong's total exports to the country, including domestic exports and re-exports, grew by 21% in 1990, and again by 48% to HK\$6,074 million in the first eleven months of 1991. The top export items included clothing, watches and clocks, radios and textiles. Apart from Spain's entry into the EEC and the concomitant reduction in import barriers, the strength of the peseta also has contributed to the expansion of Hong Kong exports. The staging of the tourist-attracting international events in 1992 is another positive factor. In the medium term, as the Spanish economy moves ahead and its import regime becomes more liberal, sales to Spain should continue to grow.

The Spanish market, however, is not without limitations. Income levels in Spain are low by European standards, and unemployment remains high at about 16%. Making matters worse, competition in the market has intensified. But the 0.3% import share for Hong Kong indicates room for expansion. To improve sales, Hong Kong exporters need to further upgrade the design and quality of their products, enhance price competitiveness and shorten delivery lead time.

In selling to Spain, exporters should note that the Spanish market is segmented into a number of regional markets linked together by Madrid and Barcelona. Hong Kong companies may appoint an agent or a distributor, or set up a branch office in these two commercial centres. Under these circumstances, setting up an operation in Spain provides Hong Kong companies an opportunity to serve the many small retail shops and to forge stronger links with the growing department stores and supermarkets. Other than some large local enterprises which have developed their business in Spain, smaller Hong Kong firms also have opened offices with the intention to sell directly to local retailers and distributors.

Also noteworthy is the Spanish clothing industry, which can offer free access to the EEC markets, a strong local demand and the possibility of low-cost subcontracting to Portugal and North African countries. But since Spain is no longer a cheap production site, Hong Kong manufacturers are advised to concentrate on high value-added production. In setting up production facilities, Catalonia — the leading industrial area in the country — is generally the preferred location, while Madrid is the most prominent service centre.

(Source: Hong Kong Trade Development Council)

## Changes in French Fur & Leather Trade

After a difficult year, wholesalers within the fur and leather trade are determined to enlarge the range of retailers likely to sell leather or even fur.

All outlets are being considered as possibilities — from middle-range specialty shops looking to expand distribution to include men's wear, to upper-range alternatives such as "beauty boutiques" that are not satisfied with simply being furriers.

The shift from the traditional markets represents a changing industry mentality, reinforced during the 1991 ready-to-wear trade shows. At these shows, manufacturers were pushing the possibility of not only re-stocking for the winter but also updating models to go with the latest fashion trends, as well as to accommodate retailers' requests.

This is the real change of the season — that leather and fur wholesalers have integrated the rules, codes and demands of ready-to-wear distribution. And, these changes in distribution go with the marked move towards a diversification of materials as proposed by the manufacturers.

Diversification has gone beyond fur and leather mixes. If the fur trimming remains, then the real innovation is in the matching of complete textile or knitted fabric collections with leather lines.

Leather manufacturers are looking more and more towards fabric for 1992 spring/summer collections and fur specialists are taking the same approach. For them, spring/summer cannot be a slack season and they are proposing new products likely to favour a link between two winter seasons.

Similar trends are emerging from sportswear importers. They are already thinking of leather, textile, footwear and accessory co-ordinates.

The trend towards more diversity and less specialization is widening along with the desire to expand the clientele. It also keeps everyone in the industry on their toes, forcing them to be more observant, innovative and into year-round production.

(Source: Hong Kong Trade Development Council)

## Exhibition News

Date	Event	Venue	Exhibits	Organizer
1992 Aug 6-9	HEALTH '92	HK Convention & Exhibition Centre	Health food, beverage & products, fitness equipment, other health equipment & techniques	Coastal Int'l Exhibition Co. Ltd. Tel: 827 6766 Fax: 827 5224
Aug 12-16	Food Expo '92	HK Convention & Exhibition Centre	General food & drink products, wine & spirits, preparation ingredients, natural food, health food, baby food	HK Trade Development Council Tel: 584 4333 Fax: 824 0249
Aug 20-21	Apparel from France	Kin Shangri-La Hotel	High fashion, ready-to-wear, leather goods, furs, fashion accessories for ladies, men & children	French Textile Office Tel: 312 0331 Fax: 739 8073
Sept 7-11	HK Watch & Clock Fair '92	HK Convention & Exhibition Centre	Watches, clocks, accessories & components, checking & measuring instruments, machines, equipment & tools, after-sales services of watches	HK Trade Development Council Tel: 584 4333 Fax: 824 0249
Sept 18-22	HK Int'l Jewellery Show '92	Kin Shangri-La Hotel	Genuine jewellery	HK Trade Development Council Tel: 584 4333 Fax: 824 0249
Sept 19-23	J WEEK '92	HK Convention & Exhibition Centre	Jewellery, timepieces, gemstones, accessories, machinery & equipment	Headway Trade Fairs Ltd. Tel: 827 5121 Fax: 827 7064
Sept 22-25	Modern Household Ind'l Environmental Cleaning Supplies & Equipment Exhibition '92	HK Exhibition Centre	Industrial environmental cleaning supplies & equipment	HK Exhibition Centre Tel: 827 9908 Fax: 827 5245

## Training Calendar

Date	Event	Venue	Organizer	Contact person/Tel no.
1992 Jul 20-24	Certificate Course on ISO 9000 Lead Assessor Training	Conference Hall, CMA Building	CMA Testing & Certification Laboratories (TCL)	Mr Tony Leung, TCL 698 8198
Jul 21-Sept 16	Personal Computer Training Course	HK Training Centre	CMA & HK Productivity Council	Ms Ellen Lau, CMA 542 8600 ext 633
Jul 23	Management Manpower Planning Seminar	VTC Tower	The Management Development Centre of HK (MDC)	Mr Andy Welsh, MDC 836 1828
Jul 28	Hongkong Owner-Manager Association Workshop	VTC Tower	The Management Development Centre of HK (MDC)	Mr Sam Ying, MDC 836 1826
Aug 3-6	Conference on Productivity, Efficiency & Reform in China's Economy	The Chinese University of HK (CUHK)	The Chinese University of HK	Mr K C Yu, CUHK 609 7031
Sept 7-25 (Mon & Fri)	Training Course on Certification of Origin & I/E Licensing	Conference Hall, CMA Bldg	CMA	Mr Stanley Au Yeung, CMA 542 8600 ext 602
Oct 6-9	EDI Asia '92	HK Convention & Exhibition Centre	Tradelink	804 1033
Oct 19-22	G-BOC '92	Osaka	Osaka Chamber of Commerce & Industry	Mr Edwin Lam, CMA 542 8600 ext 620



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### 永遠會員 Permanent Members

捷成布廠有限公司  
總經理:雷振範  
出品:漂染布  
Datsun Weaving Fty Ltd.  
Managing Director:Lui Chun Fan  
Products:Weaving products like denim

建德製衣有限公司  
董事總經理:彭禎祥  
出品:成衣  
Kinder Garments Fty Ltd.  
Managing Director:Pan Ching Cheung  
Products:Garment

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出品:印染  
Kwok Hing Dyeing Fty Ltd.  
Managing Director:Wong Kok Lam  
Products:Dyeing & printing

寶利泰製衣廠有限公司  
董事:蔡菊花  
出品:成衣  
Pollytie Fashions Co. Ltd.  
Director:Choi Kuk Fa  
Products:Garment

冠亞電子有限公司  
董事:覃民治  
出品:電子遊戲、電路板  
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Director:Tam Man Chi  
Products:Electronic games, PCB assembly

閩盛行  
經理:李長含  
出品:針織製衣  
H & F Co.  
Manager:Lee Cheung Ham  
Products:Knitwear

高鋒鐘錶製品有限公司  
執行董事:陳國峰  
出品:鐘錶製品  
High Peak Watch Products Mfy Co. Ltd.  
Managing Director:Chan Kwong Fung  
Products:Watch assembly

近代時裝有限公司  
總經理:莊瑞瓊  
出品:時裝  
Neo-fantastic Fashions Ltd.  
General Manager:Chong Shui King,  
Lucia  
Products:Fashions

港東貿易公司  
股東:尹伯恆  
出品:針織製衣  
Kong Tung Trading Co.  
Partner:Wan Pak Hang  
Products:Knitwear

禾華行  
經理:黃連成  
出品:針織製衣  
H & C Co.  
Manager:Wong Lin Shing  
Products:Knitwear

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業務:商會  
HK & Kln Electro-plating Trade  
Merchants Assn Ltd.  
Chairman:Koon Tze Ming  
Nature of business:Trade association

必定美實業有限公司  
董事:趙建康  
業務:成衣貿易  
Dr Pete Fashions Co. Ltd.  
Managing Director:Chiu Kin Hong  
Nature of business:Garment trading

好利時洋行  
船務經理:吳佩瑛  
業務:成衣、袋、人造花及植物、物料  
Honytex & Co.  
Shipping Manageress:Ng Pui King  
Nature of business:Trading of garments,  
bags, artificial flowers  
& plants & materials

Parkworld Ltd.  
董事:隋廣盛  
業務:成衣出口  
Parkworld Ltd.  
Director:Tsui Kwong Shing  
Nature of business:Garment export

偉豐公司  
經理:梁天豪  
業務:成衣  
Y & Fung Garment Co.  
Manager:T H Leung  
Nature of business:Garments

金捷臣摩打實業有限公司  
董事:李漢忠  
業務:摩打玩具  
Gold Jackson Motor Ind'l Co. Ltd.  
Director:Lee Hung Tong  
Nature of business:Motor toys

香港毛皮廠商聯會有限公司  
經理:馮妙慧  
業務:貿易推廣  
Federation of Fur Mfrs & Dealers (HK)  
Ltd.  
Manageress:Brenda Fung  
Nature of business:Trade association

百老匯皮革有限公司  
董事:陳逸敏  
業務:皮革成衣  
Broadway Fur Co. Ltd.  
Managing Director:Steve Chen  
Nature of business:Fur, leather garments

高美洋行有限公司  
董事:鄧友德  
業務:勞工手套  
HK European Mercantile Ltd.  
Managing Director:Wu Yau Tak, Peter  
Nature of business:Industrial protective  
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- \* 集中一定數量之商號
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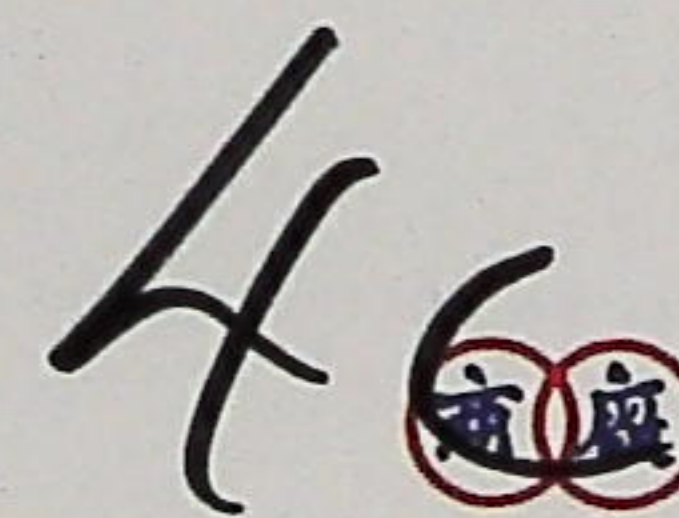
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