橋 THE BRIDGE

Issue 3 March 2005
第3期 2005 年 3月

制造业在中国的发展趋势

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Manufacturing Trends in China

Consequences for SMEs

Culture:
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SWISS CHINESE CHAMBER OF COMMERCE

中国瑞士商会

swisscham.org

A Word from the Chairman
中国瑞士商会主席致辞

Dear Readers,

a very warm welcome to the first of four planned 2005 issues of the THE BRIDGE magazine. We would like to wish you, your families and companies a prosperous, happy and healthy Year of the Rooster.

The old year expired on a sad note: the world was shocked of the tsunami and its horrible and ongoing aftermath. We are grateful that no victims from our membership or the Swiss Community in Mainland China at large were reported. Due to some legal constraints we have chosen not organize a relief fund but leave it up to members to donate on an individual basis.

Good Bye & Welcome

With year end 2004, HE Ambassador Dr. Dominique Dreyer left his post and China for good and took over the responsibility as Ambassador of Switzerland in India. We would like to thank him for his good cooperation and wish him all the best for his new challenging assignment.

At the same we would like to express a heartfelt welcome to HE Ambassador Dante Martinelli. We wish him good fortune and strength in this challenging and high position and look forward to an excellent relationship.

The first quarter of 2005 is as well traditionally the season for the General Assemblies.

Congratulations to the newly and re-elected Board Members:

SwissCham Beijing: Cyrill Eltschinger, President; Andrew Cheng, National Representative; John Liebeskind, Vice President and National Representative; Zhang Hu, Treasurer & Director of the Board, Olivier Glauser, Secretary General and National Representative; David Saudan, Director of the Board; and Jeffrey Li, Director of the Board.

SwissCham Shanghai: Ren Zhanbing, President and National Representative; Nicolas Musy, Vice President, National Representative; Walter Akeret, Secretary; Sandro Willi, Treasurer; Victor Chiam, Membership Officer; Christian Guertler, National Representative; Daniel Heusser, Event Officer; Franc Kaiser, Service Officer; Patrick Scheibli, Event Officer and Jonathan Selvadoray, Public Affair Officer.

Thank you for accepting the election and doing pro bono work for the Swiss Business Community. Our best wishes and thanks for their many years of successful service for SwissCham go also to the outgoing Board members:

SwissCham Beijing: Guillaume Boudin, Andreas Kriesi, James Chen and Manfred Steuber.

SwissCham Shanghai: Bob Heiniger and Philippe Zwahlen.

We already would like to invite all members to participate in the upcoming National General Assembly of SwissCham China to be convened in Beijing on April 18th 2005.

The invitation package will be sent out soon!

Christian Guertler

亲爱的读者：

2005年度第一期《桥》杂志又与大家见面了！在此恭贺大家鸡年身体健康，事业兴旺，合家欢乐！

过去的一年在悲伤的气氛中画上了句点：印度洋海啸事件震惊了全世界，灾难过后留给人们挥之不去的伤痛!应当感激庆幸的是我们在中国的商会会员及其他瑞士社团成员都没有受到这场灾难的伤害。由于受到法律的约束，我们没有设立捐款基金，而是让会员以个人的名义为灾民捐款。

在辞旧迎新的2004年末，Dr. Dominique Dreyer大使阁下离开了中国，被调任为瑞士驻印度大使。我们要感谢他在任期间对商会的支持并预祝他在新的岗位上一切顺利！同时，我们热烈欢迎新任驻华大使Dante Martinelli阁下！祝福他在这极富挑战的岗位上得到充分的施展，更希望彼此保持良好的合作关系！

与往年一样，中国瑞士商会年度会员大会在2005年的第一季度召开。在此，祝贺以下各位新当选及成功连任的商会董事会成员：

中国瑞士商会–北京：
Cyrill Eltschinger，主席，全国董事会董事，郑大纲，副主席，John Liebeskind，副主席，全国董事会董事，张虎，财务理事，Olivier Glauser，秘书长，全国董事会董事，David Saudan，理事，Jeffrey Li，理事

中国瑞士商会–上海：
任占并，主席，全国董事会董事，Nicolas Musy，副主席，全国董事会董事，Walter Akeret，秘书，Sandro Willi，财务理事，Victor Chiam，会籍发展理事，Christian Guertler，全国董事会董事，Daniel Heusser，会务理事，Franc Kaiser，服务理事，Patrick Scheibli，会务理事，Jonathan Selvadoray，公共事务理事

感谢诸位接受这个职务并为瑞士商界付出辛勤劳动！同时，对于以下离任的董事会成员，我们也对他们多年来为中国瑞士商会所做的贡献表示衷心的感谢！他们是：

中国瑞士商会–北京：
Guillaume Boudin, Andreas Kriesi，
James Chen, Manfred Streuber

中国瑞士商会–上海：
Robert Heiniger, Philippe Zwahlen

最后，我们在此热烈邀请各位会员参加2005年4月18日在北京举行的中国瑞士商会全国年度会员大会。请柬将在近期寄出！

哥特乐

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Magazine Project Manager 杂志项目经理:
Martin Regnet 任天翔

Chief Editor 责任编辑:
Martin Regnet 任天翔

Editors / English Collation 编辑 / 英文校对:
Mark Ceolin / Alex Schmidt 舒马克/ Alex Schmidt

Editors / Chinese Collation: 编辑 / 中文校对:
Jodie Zhu / Claire Chen 朱靖秋/ 陈剑蓉

English/Chinese Translations 英文翻译:
Jodie Zhu / Claire Chen朱靖秋/ 陈剑蓉

Cover page Design 封面设计:
Florian Lüthi 卢丰

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Claire Chen / Martin Regnet
陈剑蓉 / 任天翔

Circulation and Advertising Contacts:发行及广告联络处:

- **Shanghai上海**

Address地址:
6A, 1078 Jiang Ning Lu, Shanghai, 上海市江宁路1078号6A
Post Code邮编: 200060
Tel 电话: + 86 21 6276 1171
Fax 传真: + 86 21 6266 0859
Email 电邮: info@sha.swisscham.org

- **Beijing北京**

Address地址:
朝阳区酒仙桥路10号星城国际C座20层
Post Code 邮编: 100016
Tel 电话: + 86 10 6432 2020
Fax 传真: + 86 10 6432 3030
Email 电邮: info@bei.swisscham.org

Designe/ Layout 设计:
BIRDS & FISH communications Joy Yin
上海鱼羽图文设计咨询有限公司 尹晓薇

- **birds & fish communications** for the magazine design

上海鱼羽图文设计咨询有限公司
Tel 电话:
+ 86 21 5268 1433
Fax 传真:
+ 86 21 5268 1433
Email 电邮:
weare@birdsandfish.net
Web:
www.birdsandfish.net

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特别感谢 Margrith Lin-Huber 女士的热情支持

THE BRIDGE is a quarterly publication. Editorial and advertising are independent and do not necessarily reflect the views of the Board, the members or the staff of SwissCham China.

欢迎新大使

DANTE MARTINELLI

SWISS AMBASSADOR IN BEIJING

Ambassador Dante Martinelli is Switzerland's new Ambassador to the P.R. China since November 2004. As a graduate of the "Institut d'Etudes Politiques" in Paris, his career led him to Tunis, Washington D.C., Paris, Rome and Brussels (EU) with in between two postings in Berne, in the Integration Bureau first and then as Diplomatic Adviser to the Minister of Foreign Affairs. Being an expert for economic relations, entering China with its fast developments is an excellent task.

丹特•马提内利大使是2004年11月起瑞士驻中国的新任大使。他毕业于巴黎政治研究学院，由于职业的缘故，他的足迹踏遍突尼斯，华盛顿，巴黎，罗马和布鲁塞尔。在布鲁塞尔和伯尔尼两地，他身兼二值，先就任于整合办公室，然后任外交部的外交顾问。作为经济关系的专家，恰逢中国高速发展之时，丹特•马提内利大使来此就职是天赐良机。

Greetings from Dante Martinelli, the new Ambassador of Switzerland to China

丹特•马提内利，瑞士驻华大使馆新任大使

"As the new Ambassador of Switzerland to the P. R. China, I am very pleased to present my best wishes to THE BRIDGE readers.

I am coming to China in a very privileged time.

China is witnessing an extremely dynamic evolution. The economic growth has been sustained for many years now and continues to be a positive development in the world economy. The economic weight of China on the world stage has become very significant.

At the same time the relations between China and Switzerland, established 55 years ago, have been growing in quality and quantity and becoming more and more diversified.

This is a very satisfactory development. The importance of the economic ties is underlined by the impressive growth of the bilateral trade and by the considerable growth of Swiss direct investments in China. The diversified Swiss presence is a new development with the expanding cooperation in very promising fields like research and development, environment protection and health (research and disease prevention).

Since the recognition of the P. R. of China by Switzerland on 17th January 1950 the political framework of our relationship has been strengthened and a political dialogue established, covering bilateral and multilateral issues of common interest. In this general framework the Swiss business community in China has established itself as an important player on the economic scene and contributed thanks to its commitment and high technology to the quality of our relationship with China. I look forward to working with their representatives in the future."

Dante Martinelli

作为瑞士驻中华人民共和国的新任大使，我很高兴在此能为《桥》杂志的读者送去我的祝福。

我在一个非常吉祥的时刻来到中国。

中国正经历着极其深刻的变革。中国经济的高速发展已经持续多年并继续在世界经济发展中发挥着积极的作用。中国的经济地位在世界舞台上已是举足轻重。

与此同时，55年前建立的中瑞外交关系在质量和数量上都取得了长足的进步，并且向着更加多样化的方向发展。

这种发展是令人满意的。中瑞双边贸易的可喜增长和瑞士对华直接投资的可观涨幅突出了两国经济关系的重要性。瑞士多样化形象的展现，以及在研究发展，环境保护，卫生(研究和疾病预防）等很有前景的领域与中国的合作不断加强将是今后一个新的发展方向。

自从1950年1月17日瑞士与中国建立外交关系以来，在两国友好关系基础上的政治框架一直在不断加强，而且建立了涉及两国共同利益的双边和多边问题政治对话机制。在这个总体框架下，已经将自己定位成经济发展方面的重要一员的中国的瑞士商务团体正为它的承诺作出努力，继续提供先进的科学技术以加强瑞中两国的关系。我期待着在不久的将来能够与这些瑞士商务团体的代表共事。

丹特•马提内利

Events Review
商会活动点击

November 30, 2004: Madame Wang Hui, Director of the Information Office for the Beijing Municipal Government, receives a limited edition Novus Atlas Sinensis as a congratulations gift from Mr. Richard Liu, on behalf of SwissCham Beijing, at the Business Beijing's 100th issue celebration event.

2004年11月30日　在北京月讯商务特刊第100期庆祝仪式上，北京市政府新闻办公室主任王惠女士收到了由中国瑞士商会—北京代表刘念祖先生赠送的中国瑞士商会限量版地图临摹本作为此次活动的贺礼。

January 27, 2005 SwissCham Beijing Celebrating Together Mr. Andrew Ning's Inauguration as the Beijing Chief Representative of Winterthur Swiss Insurance Company

2005年1月27日中国瑞士商会—北京参加瑞士丰泰保险公司驻北京总代表 Andrew Ning 先生的就职典礼

Photo: Left to Right: Mr. Fabian Furrer, Executive Director, SwissCham; Mr. Andrew Ning, Chief Representative, Winterthur (China), Mr. Wolfgang Schmidt–Soelch, Member of the Executive Board of Winterthur Group (Switzerland); Mr. Andrew Cheng, Board of Director, SwissCham (UBS); and Mr. Richard Liu, Business Development Manager, SwissCham.)

见图:从左至右：中国瑞士商会北京执行总监Fabian Furrer 先生；丰泰中国总代表 Andrew Ning 先生；瑞士丰泰集团董事会成员 Wolfgang Schmidt–Soelch 先生；中国瑞士商会董事 Andrew Cheng 先生（UBS）；中国瑞士商会北京业务发展经理刘念祖先生。

February 28, 2005: SwissCham Beijing supporting the official opening of CBC's new Beijing office - John Liebeskind, SwissCham Board of Director, making congratulatory remarks, with Charles Merkle, President & CEO, CBC; and H.E. Dante Martinelli.

2005年2月28日:中国瑞士商会—北京参加了CBC在北京的新办公室的正式落成典礼。中国瑞士商会董事 John Liebeskind 先生；以及 CBC 总裁兼首席执行官 Charles Merkle 先生和 H.E. Dante Martinelli 先生分别发表了贺词。

January 25, 2005: SwissCham Beijing's Annual General Assembly

The new Board of Directors with H.E. Mr. Dante Martinelli, Ambassador of Switzerland

2005年1月25日中国瑞士商会—北京年度大会

董事会新成员和瑞士大使 H.E. Mr. Dante Martinelli 先生在一起

Photo: Left to Right: Mr. Edgar Doerig, Hon. Board of Director, Embassy of Switzerland; Mr. Oliver Glauser, Secretary General, Board of Director; Mr. Cyrill Eltschinger, President of SwissCham Beijing; H.E. Mr. Dante Martinelli, Ambassador of Switzerland; Mr. David Saudan, Board Of Director; Mr. Andrew Cheng, Vice-President, Board of Director; and Mr. John Liebeskind, Vice-President, Board of Director. Missing: Mr. Zhang Hu, Treasurer, Board of Director and Mr. Jeffrey Li, Board of Director.

见图:　从左至右为瑞士大使馆，董事　Edgar Doerig 先生；秘书长兼董事 Olivier Glauser 先生；中国瑞士商会北京会长 Cyrill Eltschinger 先生；瑞士驻华大使 H.E. Mr. Dante Martinelli 先生；董事 David Saudan 先生；副会长兼董事 Andrew Cheng 先生；副总裁兼董事 John Liebeskind 先生。缺列：财务董事张虎先生以及董事 Jeffrey Li 先生。

December 30, 2004 Cigar Aficionado & Rum Tasting Dinner - Reflecting on a year's worth of activities with friends and members in style. A three-course South American-styled dinner menu presented with fine wines, premium cigars, including hand-rolled and Montecristo Cuban Cigars, with plenty of genuine Cuban brewed Rum, complemented this relaxed evening of fine spirits and good company at the Capital Club.

2004年12月30日　雪茄迷和品酒晚宴—中国瑞士商会—北京的会员和朋友们以此形式共同回顾这一年来许多颇具价值的活动。由美酒和上好雪茄组成了富于南美风情的晚宴，包括手工卷制的Pyramides和Motecristo古巴雪茄和大量的纯正古巴酿造的甘蔗甜酒。这一切伴随着大家在京城俱乐部度过了一个轻松愉快的美好的夜晚。

Sunday, February 6, 2005: The SwissCham Beijing Team Spring Festival Brunch - Spending the Spring Festival together at The Orchard to celebrate the challenges and successes in 2004, while looking towards a prosperous 2005 Year of the Rooster.

Photo: From Left to Right: Mr. Fabian Furrer; Mr. John Liebeskind; Mr. Richard Liu; Mr. Zhang Hu; Ms. Molly Li; and Mr. Cyrill Eltschinger)

2005年2月6日　星期日　中国瑞士商会—北京春节集体会餐大家在果园餐厅共渡春节，庆祝充满挑战和成功的2004年，展望欣欣向荣的2005年鸡年。

见图: 从左至右：费斌先生；John Liebeskind先生；刘念祖先生；张虎先生；李文洁小姐以及Cyrill Eltschinger先生。

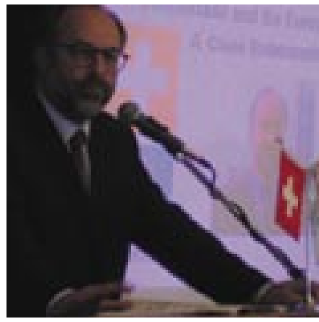
February 24, 2005 : SwissCham Banking & Investment Committee Panel Discussion - China Banking/Investment Development & Trends after WTO with Mr. Chen Xiaoming, CitiBank Group; Mr. Helmut Struss, Siemens Mobile Acceleration Ventures; Mr. Peter Schmidt, Dredsner Bank; and Mr. George Cheung, VCNOffice Corporation Ltd.

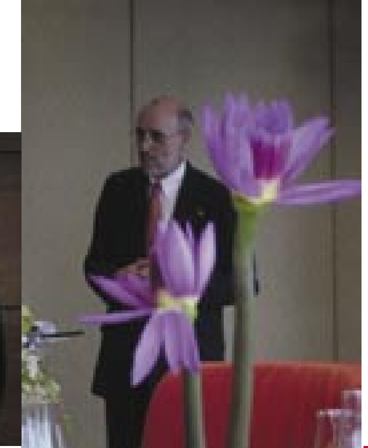
2005年2月24日　中国瑞士商会金融和投资委员会分组讨论会议关于中国入世后金融/投资发展方向和趋势的讨论。参与讨论的有：花旗银行集团，陈晓明先生；西门子，Helmut Struss先生；德意志银行，Peter Schmidt先生；华富勤国际商务顾问有限公司，张纪荣先生。

February 28, 2005: Switzerland and the European Union: A Close Relationship - an informative presentation with, H.E. Dante Martinelli the new Ambassador of Switzerland to China.

2005年2月28日 瑞士和欧盟：密切的关系

瑞士驻华大使H.E. Dante Martinelli 先生介绍了丰富的内容。





Jan. 27th, 2005 in Shanghai Hilton: "Switzerland: A special case. The implication of the agreement with EU.": Ambassador Eric Martin (right picture), Head of the Economic and Financial Affairs Division at the Federal Department of Foreign Affairs, Berne (Switzerland) highlights the recent bilateral developments

2005年1月27日，上海希尔顿大酒店
主题："瑞士：一个特殊的例子。欧盟协议所产生的影响"
瑞士日内瓦联邦外交事务部，经济，金融事务部大使， Eric Martin先生阐述了最新双边关系

February 18, 2005.: SwissCham Members taking a serious look at Writing as a Managerial Skill

2005年2月18日 中国瑞士商会—北京的会员在认真观看管理写作技巧

November 12, 2004: Mr. Fabian Furrer, SwissCham Beijing Executive Director, showing Mr. Daniel Kung, CEO of OSEC, and Alfred Rechsteiner, Senior Consultant of OSEC, the first issue of SwissCham's magazine--The Bridge.

2004年11月12日 中国瑞士商会—北京执行总监费斌先生为OSEC首席执行官Daniel Kung先生和OSEC高级顾问Alfred Rechsteiner 先生展示中国瑞士商会《桥》杂志的创刊号

January 22, 2005: Mr. Cyrill Eltschinger, President of SwissCham Beijing, showing Raclette lovers the fine qualities of an authentic Swiss Alpine Horn during the Annual Raclette Evening at the China World Hotel.

2005年1月22日 中国瑞士商会—北京会长 Cyrill Eltschinger先生，在中国大饭店举办的年度瑞士奶酪之夜的活动中，为瑞士奶酪的爱好者们展示了真正来自瑞士的阿尔卑斯号角

The Alexia Gardner Quartet provides a relaxed mood in Christmas time at SwissCham's Christmas Event on December. 15, 2004 in Raphael's Restaurant at Shanghai Yangtze Renaissance Hotel

2005年12月15日 上海扬子江大酒店
Alexia Gardner Quartet 的表演 为瑞士商会的圣诞聚会带来了轻松与欢乐。

November 16th, 2004. in JC Mandarin: "IPP Strategies for Manufacturing Firms in China—How do foreign Companies protect their Intellectual Property in China?". Speaker: Eugen von Keller (Roland Berger Strategy Consultants, President Asia).

2004年11月16日，上海锦沧文华大酒店 主题：在华生产型企业的知识产权保护策略—外资企业如何在中国保护他们的知识产权？ 发言人：Eugen von Keller 先生(Rolang Berger 公司， 战略顾问及亚洲区总裁）

SwissCham Shanghai executive team with Swiss Ambassador, Dante Martinelli and Consul General, Hans Roth, SwissCham Shanghai President, Ren Zhanbing

Photo: Left to Right: Jeffrey E. Lunz, Diana Jiang, Barbara Kaech Schwab, Jodie Zhu, Dante martinelli,Hans Roth,Claire Chen, Ren Zhanbing.

中国瑞士商会–上海执行成员和瑞士驻华大使，丹特.马提内利先生及驻沪总领事,洪含雅先生，中国瑞士商会–上海会长，任占并先生

见图：左起：孙大圣，姜文琴，芭芭拉，朱靖秋，丹特.马提内利，洪含雅，陈剑蓉，任占并

Jan. 14, 2005, Pudong Century Park: 2005 New Year Appreciation Lunch with 15 Chambers Presidents and Executives.

2005年1月14 日 浦东世纪公园 浦东陆家嘴功能区管理委员会与15家商会主席及执行人员的2005年新春酒会

Photo: left: Mr. Zhang Guohong, Deputy Mayor of Pudong New Area (right), receives the Novus Atlas Sinensis from Ren Zhanbing, President of SwissCham Shanghai (left)

见图：左任占并先生，中国瑞士商会上海会长向张国洪先生，浦东新区副区长赠送中国瑞士商会限量版地图临摹本。

March 8, 2005.
in Shanghai JC Mandarin:

Dinner Event with Ambassador of Switzerland, Mr. Dante Martinelli, topic of "The Evolving Relationship between Switzerland and the European Union"

2005年3月8日 上海锦沧文华大酒店
与新任瑞士驻华大使， Dante Martinelli 先生晚宴，主题 "瑞士与欧盟关系的最新进展

November 11, 2004
Cotton's Bar,
Swiss Chamber Networking Night

2004年11月11日 棉花俱乐部

中国瑞士商会—上海联欢夜

February 28, 2005. Laris Restaurant, Three on The Bund Lunchnoe event on the topic of "Managing Return on Investment (ROI) of Training: Use of ISO 10015 Quality Standard' provided by Dr.Lichia Saner-Yiu & Dr. Raymond Saner

2005年2月28日 上海外滩三号陆唯轩
主题：运用ISO10015国际质量管理体系有效掌握人力培训的投资汇报率

发言人：Lichia Saner–Yiu 博士和 Raymond Saner博士

March 16,2005 Hilton Hotel Shanghai,

SwissCham Shanghai General Assembly 2004

2005年3月16日 上海希尔顿大酒店

中国瑞士商会—上海2004年度会员大会

SwissCham Shanghai
President
Mr. Ren Zhangbing
中国瑞士商会–上海，会长，任占并先生

SwissCham Shanghai 2004 The Board
中国瑞士商会–上海 2004年董事会成员

SwissCham Shanghai 2004 General Assembly Dinner
中国瑞士商会–上海 2004年度会员大会 晚宴

SwissCham Shanghai 2004 GA Voting
中国瑞士商会–上海 2004年度会员大会 会员投票

SwissCham Shanghai PR Officer Jonathan Selvadoray leads the auction of gifts provided by the Sponsors Fanghua and Austrian Airways.
中国瑞士商会上海公共关系理事，Jonathan Selvadoray先生主持由芳华和奥地利航空公司赞助的拍卖会

New Board Member
Victor Chiam,
General Manager of Sulzer Shanghai introduces himself to the audience.
新当选的中国瑞士商会–上海 董事Victor Chiam先生，苏尔寿(上海)公司总经理

New SwissCham Shanghai Board Member,
Mr.Walter Akeret,
President and CEO of KUK(China)Co. Ltd., thanks the audience for his election.
新当选的中国瑞士商会–上海 董事，Walter Akeret先生，科双电子（中国）有限公司总裁

SwissCham New Members

Beijing 北京

Ms. Monika Robustelli
Company: ERNST & YOUNG HUA MING
Level 15&16, Tower E3 The Towers, Oriental Plaza
No. 1 East Chang AN Ave. Dong Cheng District,
100738 Beijing
Web: www.ey.com/china
Tel: + 86 10 65246688 ext. 2516
Fax: + 86 10 8518 8308
名称: ERNST & YOUNG HUA MI
地址: 北京
邮编: 100738
电话: + 86 10 6524 6688 ext. 2516
传真: + 86 10 8518 8308

Mr. Jeff Bi Hua
Company: SHANDONG TRALIN PACKAGING CO., LTD.
Unit–A, 4–2/F, No. 14, Jiuxian Qiao Rd., Chaoyang
District, 100016 Beijing
Web: www.tralinpak.com
Tel: + 86 10 6435 6368
Fax: + 86 10 6435 6068
名称: 山东泉林包装有限公司
地址: 北京市朝阳区酒仙桥路14号, A区4栋2层
邮编: 100016
网站: www.tralinpak.com
电话: + 86 10 6435 6368
传真: + 86 10 6435 6068

Ms. Meg Maggio
Company: COURTYARD GALLERY
95 Dong Hua Men Dajie, Dong Cheng District,
100006 Beijing
Web: www.courtyard–gallery.com
Tel: + 86 10 6526 8882
Fax: + 86 10 6526 8880
名称: 北京四合苑画廊
地址: 北京东城区东华门大街95号
邮编: 100006
电话: + 86 10 6526 8882
传真: + 86 10 6526 8880

Mr. Alain F. Berger
Company: ALSTOM CHINA INVESTMENT CO., LTD.
29/F, Silver Tower, No. 2 North Dongsanhuan Rd.,
Chaoyang, 100027 Beijing
Web: www.alstom.com.cn
Tel: + 86 10 6410 6288
Fax: + 86 10 6410 6289
名称: 阿尔斯通(中国)投资有限公司
地址: 东三环北路2号,南银大厦29层
邮编: 100027
电话: + 86 10 6410 6288
传真: + 86 10 6410 6289

Mr. Karl-Heinz Emberger
Company: SCHENKER (H.K.) LTD.
BEIJING REPRESENTATIVE OFFICE
Ceroilfood Kaida Building, Rm 308, 19B, Minwang,
Hepingli Dong St., Dong Cheng, 100013 Beijing
Web: www.schenker.com
Tel: + 86 10 6429 6520
Fax: + 86 10 6429 6517
名称: SCHENKER (H.K.) LTD.
BEIJING REPRESENTATIVE OFFICE
地址: 东城区和平里东街民旺乙19号,中粮凯达大厦3层302
邮编: 100013
电话: + 86 10 6429 6520
传真: + 86 10 6429 6517

Dr. Christoph Stark
Mr. Andreas Kunz
Company: BMW BEIJING REPRESENTATIVE OFFICE
23rd F, Millennium Tower, 38 Xiaoyun Rd., Chaoyang
District, 100027 Beijing
Web: www.bmw.com.cn
Tel: + 86 10 8453 9900
Fax: + 86 10 8453 9595
名称: BMW 北京代表处
地址: 北京市朝阳区宵云路38号,盛世大厦23层
邮编: 100027
电话: + 86 10 8453 9900
传真: + 86 10 8453 9595

Mr. Russ M. Miller
Company: BEIJING FOREIGN ENTERPRISE HUMAN RESOUCES CO., LTD.
Rm. 331, FESCO Building, No. 14 Chaoyangmen
Nandajie, Chaoyang
Web: www.fesco.com.cn
Tel: + 86 10 8561 2453
Fax: + 86 10 8561 2467
名称: 北京外企人力资源服务有限公司
地址: 北京市朝阳门南大街14号外企办公楼331室
邮编: 100044
电话: + 86 10 8561 2453
传真: + 86 10 8561 2467

Mr. Pierre Denuelle
Mr. Alexandre Fidanza
Company: INDUSTRY CONSULTING CHINA
20 Rue Crillon, 69006 Lyon, France
Tel: +33 6 7331 4803
Fax: +33 4 7244 9425
名称: 公司
地址: 北京市
电话: +33 6 7331 4803
传真: +33 4 7244 9425

Mr. Christian Merbach
Company: BOSCHUNG MECATRONIC LTD.
Route d' Englisberg 21, 1763 Granges–Paccot, Switzerland
Web: www.boschung.com
Tel: +41 26 460 4411
Fax: +41 26 460 4488
名称: 公司
地址: 北京市
电话: +41 26 460 4411
传真: +41 26 460 4488

Mr. George Lillie
Company: BEIJING HORBERMEAT PRODUCTS CO., LTD.
Shiziying Village, Baishan County, Changping District,
102211 Beijing
Web: www.bjhorber.com
Tel: + 86 10 6173 7024
Fax: + 86 10 6173–7074
名称: 北京好伯肉食有限公司
地址: 北京昌平区百善镇狮子营村
邮编: 102211
电话: + 86 10 6173 7024
传真: + 86 10 6173 7074

Mr. Jim Stent
Ms. Valerie Ge
Company: WILDCHINA COMPANY LTD.
Rm. 801, Oriental Place, No. 9 East Dongfang Rd, North
Dongsanhuan Rd, Chaoyang District, 100027 Beijing
Web: www.wildchina.com
Tel: + 86 10 6465 6602
Fax: + 86 10 6465 1793
名称: 北京市中国旅行社东方路门市部
地址: 北京市朝阳区东三环北路
东方东路9号东方国际大厦801室
邮编: 100013
网站: www.wildchina.com
电话: + 86 10 6465 6602
传真: + 86 10 6465 1793

Mr. Andre Dutter
Company: SINGLE BUOY MOORINGS INC.
Rm 2616, 26th Floor, Jing Guang Centre, Hu Jia Lou,
Chaoyang District, 100020 Beijing
Web: www.singlebuoy.com
Tel: + 86 10 6597–8966
Fax: + 86 10 6597–8965
名称: 瑞士单浮筒系泊公司北京代表处
地址: 朝阳区呼家楼京广中心2616室
邮编: 100020
电话: + 86 10 6597–8966
传真: + 86 10 6597–8965

Ms. Helen Guan
Company: STAR ALLIANCE ENTERPRISE
Xilian Int. Stone Trade Center, Chaoyang District, 100023 Beijing
Tel: + 86 10 8150 5866

Corporate Members

Fax: + 86 10 8150 5811
名称: 北京鸿基东方贸易有限公司
地址: 北京市朝阳区西联国际石材交易中心主楼2楼
邮编: 100023
电话: + 86 10 8150 5866
传真: + 86 10 8150 5811

Mr. Johnson Li
Company: COMARCO WIRELESS TECHNOLOGIES
1817,18 F China Merchants Tower,Jian Guo Road,Chao
Yang District, Beijing 100022, China
Web: www.comarco.com
Tel: + 86 10 6567 2299 ext 6605
Fax: + 86 10 6567 2255
名称: 瑞士咖啡机有限公司
地址: 北京东三环南路19号,联合国际大厦12层
邮编: 100022
电话: + 86 10 6567 2299 ext 6605
传真: + 86 10 6567 2255

Mr. Guillaume Boudin
Company: BAX GLOBAL LTD., BEIJING REP. OFFICE
Rm. A101 Lonsdale Center, No. 5 Wan Hong Rd.,
Chaoyang District, 100015 Beijing
Web: www.baxglobal.com
Tel: + 86 10 6436 5553
Fax: + 86 10 6435 1441
名称: 香港伯灵顿空运全球有限公司北京办事处
地址: 北京朝阳区大山子环岛东方红路5号, 蓝涛中心A101
邮编: 100015
电话: + 86 10 6436 5553
传真: + 86 10 6435 1441

Mr. Kemal Ayyildiz
Company:
DEUTSCHE TELEKOM REGIONAL OFFICE CHINA.
Beijing Lufthansa Center Office S112, Beijing 100016
Tel: + 86 10 6465 1602
Fax: + 86 10 6465 1612
名称: 德国电信
地址: 北京燕莎中心写字楼S112
邮编: 100016
电话: + 86 10 6465 1602
传真: + 86 10 6465 1612

Mr. Olivier Moeschler
Company: KUONI TRAVEL LTD – HONG KONG BRANCH
10C, CITIC Building, 19 Jianguomenwai Street, Beijing 100004
Web: www.zhongzi.com.cn
Tel: + 86 10 8526 2148
Fax: + 86 10 8526 2149
名称: 中咨律师事务所
地址: 北京朝阳区建国门外大街19号国际大厦10–C室
邮编: 100004
电话: + 86 10 8526 2148
传真: + 86 10 8526 2149

Mr. Jean Hinden
Company: BEIJING LEM ELECTRONICS CO., LTD.
No. 1, Standard Factory Building, Section B, Airport
Industrial Area, Beijing 101300 China
Tel: + 86 10 8048 4098
Fax: + 86 10 8048 4303
名称: 北京莱姆电子有限公司
地址: 北京空港工业区B区标准厂房1号楼
邮编: 101300
电话: + 86 10 8048 4098
传真: + 86 10 8048 4303

Individual Members

Mr. Charles Bingham
Company: EMPIRE PRINTING
5Jianguomen Dajie, 100020 Beijing
Web: www.epasia.com.cn
Tel: + 86 10 6595 9013
Fax: + 86 10 6592 9510
名称: 英派尔彩印公司
地址: 北京建外大街5号,建国饭店首层143室
邮编: 100020
电话: + 86 10 6595 9013
传真: + 86 10 6592 9510

Mr. Matthew Farthing
Company: HARROW INTERNATIONAL SCHOOL
No. 5, 4th Block, Anzhenxili, Chaoyang District, 100029 Beijing
Tel: + 86 10 8497 1797
Mob: + 86 10 8497 2182
名称: 公司
地址: 北京
邮编: 100020
电话: + 86 10 8497 1797
传真: + 86 10 8497 2182

Mr. Andy Clark
Company: CLARKMORGAN TRAINING
Suite 6, Level 6, Ming An, Dong Zhi Men Nei, Beijing
Web: www.clarkmorgan.com
Tel: + 86 10 8406 4760
Fax: + 86 10 8406 4840
名称: CLARKMORGAN TRAINING
地址: 北京东城区东直门内民安街16号
邮编: 100027
电话: + 86 10 8406 4760
传真: + 86 10 8406 4840

Mr. Zhang Jin Shan
W5D, Long Cheng villas, Chang Ping, 102208 Beijing
Tel: + 86 10 8079 0877
Fax: + 86 10 8079 6572
地址: 北京昌平龙城花园W5D
邮编: 102208
电话: + 86 10 8079 0877
传真: + 86 10 8079 6572

Mr. Jeremy Cheung
Company: Y–BEAUTY INC.
Rm. 913 A, Tower B, Fulllink Plaza, No. 18 Chaowai Ave,
100020 Beijing
Tel: + 86 10 8511 0561
Fax: + 86 10 8511 0577
名称: Y–Beauty Inc.
地址: 北京朝外大街18号,丰联广场B座913A
邮编: 100020
电话: + 86 10 8511 0561
传真: + 86 10 8511 0577

Mr. Omar Leon Sanchez H.
Company: HABANOS S.A. BEIJING REP. OFFICE
1608A, HanWei Plaza East Building, Guang Hua Road,
Chaoyang District, 100004 Beijing
Tel: + 86 10 6561 2896
Fax: + 86 10 6561 2897
名称: Habanos s.a. Beijing Rep. Office
地址: 北京市朝阳区汉威大厦1608A
邮编: 100004
电话: + 86 10 6561 2896
传真: + 86 10 6561 2897

Mr. Rolf H. Schweizer
Company: VECTOR CONTROLS LTD.
Room 208, 23 Xi Huan Bei Road, Hua Teng Fa Zhan Building,
Yi Zhuang Jing Ji Ji Shu Kai Fa Qu, 100175 Beijing
Web: www.vectorcontrols.com
Tel: + 86 10 6786 9251
Fax: + 86 10 6786 9256
名称: 伟拓嘉业新技术(北京)有限公司
地址: 北京亦庄经济技术开发区西环北路23号,
华腾发展大厦208室
邮编: 100027
电话: + 86 10 6786 9251
传真: + 86 10 6786 9256

Mr. Jonathan Tsao
Company: CHINABEAT LTD.
17 Pan Jia Yuan Nan Li, Chaoyang District, 100021 Beijing
Web: www.handian.com.cn
Tel: + 86 10 6498 3747
Fax: + 86 10 6498 0047
名称: 汉点公司
地址: 北京市朝阳区小营路9号, 亚运豪庭A座, 21–C 室
邮编: 100101
电话: + 86 10 6498 3747
传真: + 86 10 6498 0047

Mr. Alex Hofer
Company: FLYING–MAN–CLUB
Web: www.flying–man.com
Tel: + 86 10 135 8158 8584
电话: + 86 10 135 8158 8584

Mr. Liming Hou
Company: EURO CHINA GROUP
15A, HanWei Plaza East Building, Guang Hua Road,Chaoyang District, 100004 Beijing
Web: www.euro-china.com
Tel: + 86 10 8538 0355
Fax: + 86 10 8538 0353
名称: 中欧公司集团
地址: 北京市朝阳区汉威大厦东区15A
邮编: 100004
电话: + 86 10 8538 0355
传真: + 86 10 8538 0353

Corporate Associate Members

Ms. Karin Malmstrom
Company:MALMSTROM ASSOCIATES ORIENT CO., LTD.
15 G Hing Keng Shek, Saikung, Hong Kong SAR
Web: www.mao-hk.com
Tel: +852 9135 5435
Fax: +852 2719 2275
电话: +852 9135 5435
传真: +852 2719 2275

Mr. Frank Zhang
Company:
BIT CHINA BUSINESS CONSULTING (TIANJIN) CO., LTD.
Rm. 211 South Building, No. 116 Chengdu Rd. Tianjin
Web: www.chinabizconsulting.com.cn
Tel: + 86 22 2313 7866
Fax: + 86 22 2330 4656
名称: 天津博德商务信息咨询有限公司
地址: 天津市成都道116号南楼211室
邮编: 300051
电话: + 86 22 2313 7866
传真: + 86 22 2330 4656

Ms. Julie Han
Company:BEIJING DODA INTERNATIONAL CARGO TRANSPORTATION CO., LTD.
North Court, No. 256 Nan Yang Zhuang Cun, Shi Ba Li Dian Xiang, Chaoyang District, 100023 Beijing
Web: www.doda.com.cn
Tel: + 86 10 6747–3412
Fax: + 86 10 6747–4953
名称: 北京多达国际货运代理有限公司
地址: 北京是朝阳区十八里店乡南阳庄村256号北院
邮编: 100023
电话: + 86 10 6747–3412
传真: + 86 10 6747–4953

Mr. Wayne Wong
Company: BESTRIDE ESTATE DEVELOPMENT CO., LTD.
2508 Silver Tower, Third Ring Road North, 100027 Beijing
Tel: + 86 10 8448 6666
Fax: + 86 10 8410 7501
电话: + 86 10 8448 6666
传真: + 86 10 8410 7501

Mr. Peter Thong
Company: CARHART INC. BEIJING REP. OFFICE
1106 Grand Pacific Building 8 Guanghua Rd, Chaoyang District, 100026 Beijing
Web: www.carhartintl.com
Tel: + 86 10 6583 2636
Fax: + 86 10 6583 2285
名称: 美国开怀有限公司北京办事处
地址: 和乔大厦C座1106室,朝阳区光华路甲8号
邮编: 100026
电话: + 86 10 6583 2636
传真: + 86 10 6583 2285

Ms. Serena Rovai
Company: GRENOBLE GRADUATE SCHOOL OF BUSINESS
Rm. 1410, N. 2550 Zhongshan Rd., 200063 Shanghai
Web: www.ggsb.com
Tel: + 86 21 6285–2026
Fax: + 86 21 6285–2026

Mr. Rurik Nystrom
Company: REDBANG INTERNATIONAL
No. 0808, Building 6, SOHO No. 88 Jianguolu, 100022 Beijing
Web: www.redbang.com
Tel: + 86 10 8580–3165
Fax: + 86 10 8580–0250
名称: redBang国际有限公司
地址: 现代城6号楼0808室,建国路88号
邮编: 100022
电话: + 86 10 8580–3165
传真: + 86 10 8580–0250

Ms. Liang Zhang
Company: BEIJING ZHONGHAIHONGXIN CO., LTD.
Rm 913A, Tower B, FullLink Plaza, Chaoyang District, 10002 Beijing
Tel: + 86 10 8511 0561
Fax: + 86 10 8511 0577
名称: 北京中海鸿信科技有限公司
地址: 北京朝阳区丰联广场B座913A室,
邮编: 10002
电话: + 86 10 8511 0561
传真: + 86 10 8511 0577

Mr. Jackson Wang
Company: PDP–PROFESSIONAL DEVELOPMENT PARTNER
7F, Building B, Fairview Garden, Chaoyang District, 100020 Beijing
Web: www.pdpnet–china.com
Tel: + 86 10 8561 4698
Fax: + 86 10 8511 0577
名称: 北京世纪罗纳投资顾问有限责任公司
地址: 北京市朝阳区怡景园北里怡景园大厦B座7F
邮编: 100020
电话: + 86 10 8561 4698
传真: + 86 10 8511 0577

Mr. Michael Diehl
Tel: + 86 10 6551 0893
电话: + 86 10 6551 0893

Ms. Sarah Wang
Company:
MICHELIN SHENYANG TYRE CO., BEIJING BRANCH
No. 3 Sanlitun Road, Chaoyang, 100027 Beijing
Web: www.michelin.com.cn
Tel: + 86 10 6468–8855
Fax: + 86 10 6468–8542
名称: 米其林沈阳有限公司, 北京代表处
地址: 北京市朝阳区三里屯路甲3号
邮编: 100027
电话: + 86 10 6468–8855
传真: + 86 10 6468–8542

Mr. Dieter Hornig
Company: HUA DE FENG YING CO., LTD.
C–19A Tuan Jie Villa, No. 12 Tuan Jie Lake Dongli, 100026 Beijing
Web: www.elomnibus.com
Tel: + 86 10 8598–2836
电话: + 86 10 8598–2836

Mr. David Fieldman
Company: DINGDIAN CONSULTANTS
P.O. Box 100600–6640 International Post Office, Jianguomen, 100600 Beijing
Web: www.ddconsultants.cn
Tel: + 86 10 8677 4808
名称: 北京市鼎典咨询有限公司
地址: 北京市东三环南路54号华腾园6–1201室
邮编: 100600
电话: + 86 10 8677–4808Co., Ltd.

CHAMBER NEWS 商会新闻

SwissCham New Members

Shanghai 上海

Corporate Members

Mr. Marco Hoerler
Company: IMH LIMITED
Room406, Building A Hengsen Plaza,868 Chang Ping Road,Shanghai
Web: www.imh.cn
Tel: + 86 21 6218 3746
Fax: + 86 21 6217 3746
地址: 上海市昌平路868号恒森广场A幢406室
邮编: 200042
电话: + 86 21 6217 3746
传真: + 86 21 6217 3746

Mr. Mujia Zhang
Company:
GEORGE FISCHER AUTOMOTIVE (SUZHOU) CO LTD.
NO.5 Wushan Road, Gangqu Town, Zhangjiagang
Web: www.automotive.georgfischer.com
Tel: + 86 512 5833 1650
Fax: + 86 512 5833 3652
名称: 乔治费歇尔汽车产品(苏州)有限公司
地址: 张家港市港区镇巫山路5号
邮编: 215633
电话: + 86 512 5833 1650
传真: + 86 512 5833 3652

Mr. Rudolf Steffen
Company: MDC DAETWYLER (CHINA) CO., LTD.
No.2 Building(N), 789 Shenfu Road,Shangha
Web: www.mdc–china.cn
Tel: + 86 21 5442 5742
Fax: + 86 21 5442 5313
名称: 墨迪希戴怀勒凹凸版印刷技术(上海)有限公司
地址: 上海莘庄工业区申富路789号2号楼(北)
邮编: 201108
电话: + 86 21 5442 5742
传真: + 86 21 5442 5313

Mr. Jan Schuermann
Company: SIG(Schweizerische Industriegesellschaft)
22/F,Shanghai Overseas Chinese Mansion,129 Yanan Xi Lu,Shanghai
Web: www.sig.biz
Tel: + 86 21 6248 0885
Fax: + 86 21 6249 9541
名称: 康美包（苏州）有限公司上海办事处
地址: 上海市延安西路129号华侨大厦22楼
邮编: 200040
电话: + 86 21 6248 0885
传真: + 86 21 6249 9541

Mr. Ko-Lin Feng
Company: SIEGFRIED LTD. SHANGHAI REPRESENTATIVE OFFICE
12A, Pufa Tower, No. 588 Pudong (S) Road, Shanghai
Web: www.siegfried.ch
Tel: + 86 21 5876 5019
Fax: + 86 21 5840 4753
名称: 瑞士斯福瑞有限公司上海办事处
地址: 上海市浦东南路588号浦发大厦12A
邮编: 200120
电话: + 86 21 5876 5019
传真: + 86 21 5840 4753

Corporate Associate Members

Mr. Dominik Merer Dr.
Company: AXON PARTNERS LTD.
PO Box 4640 , 6304
Web: www.axonpartners.ch
Tel: + 41 41 729 0702
Fax: + 41 41 729 0701
电话: + 41 41 729 0702
传真: + 41 41 729 0701

Individual Members

Mr. Beat Guttinger
Company: WÄRTSILÄ CHINA LTD.
Unit A,14th floor World Plaza,855 Pudong Rd,Shanghai
Web: www.wartsila.com
Tel: + 86 21 5877 8800
Fax: + 86 21 5877 1629
名称: 瓦锡兰中国有限公司
地址: 上海市浦东南路855号世界广场14楼A座
邮编: 200120
电话: + 86 21 5877 8800
传真: + 86 21 58771629

Mr. Stefan Unger
Company: AL–KO THERM GMBH
228 East Shanghai Road, Tongji Technology and Industry Park, Building B4,Taicang City, Jiangsu Province
Web: www.al–ko.de
Tel: + 86 512 5356 3838
Fax: + 86 512 5356 3840
名称: 苏州爱科空调有限公司
地址: 江苏省太仓市上海东路228号同济科技园区B4幢
邮编: 215400
电话: + 86 512 5356 3838
传真: + 86 512 5356 3840

Mr. Kurt Küthi
Company: WÄRTSILÄ CHINA LTD.
Unit A, 14th Floor, World Plaza, 855 Pudong Rd, Shanghai
Web: www.wartsila.com
Tel: + 86 21 5877 8800
Fax: + 86 21 5877 1609
名称: 瓦锡兰中国有限公司
地址: 上海市浦东南路855号世界广场14楼A座
邮编: 200120
电话: + 86 21 5877 8800
传真: + 86 21 5877 1609

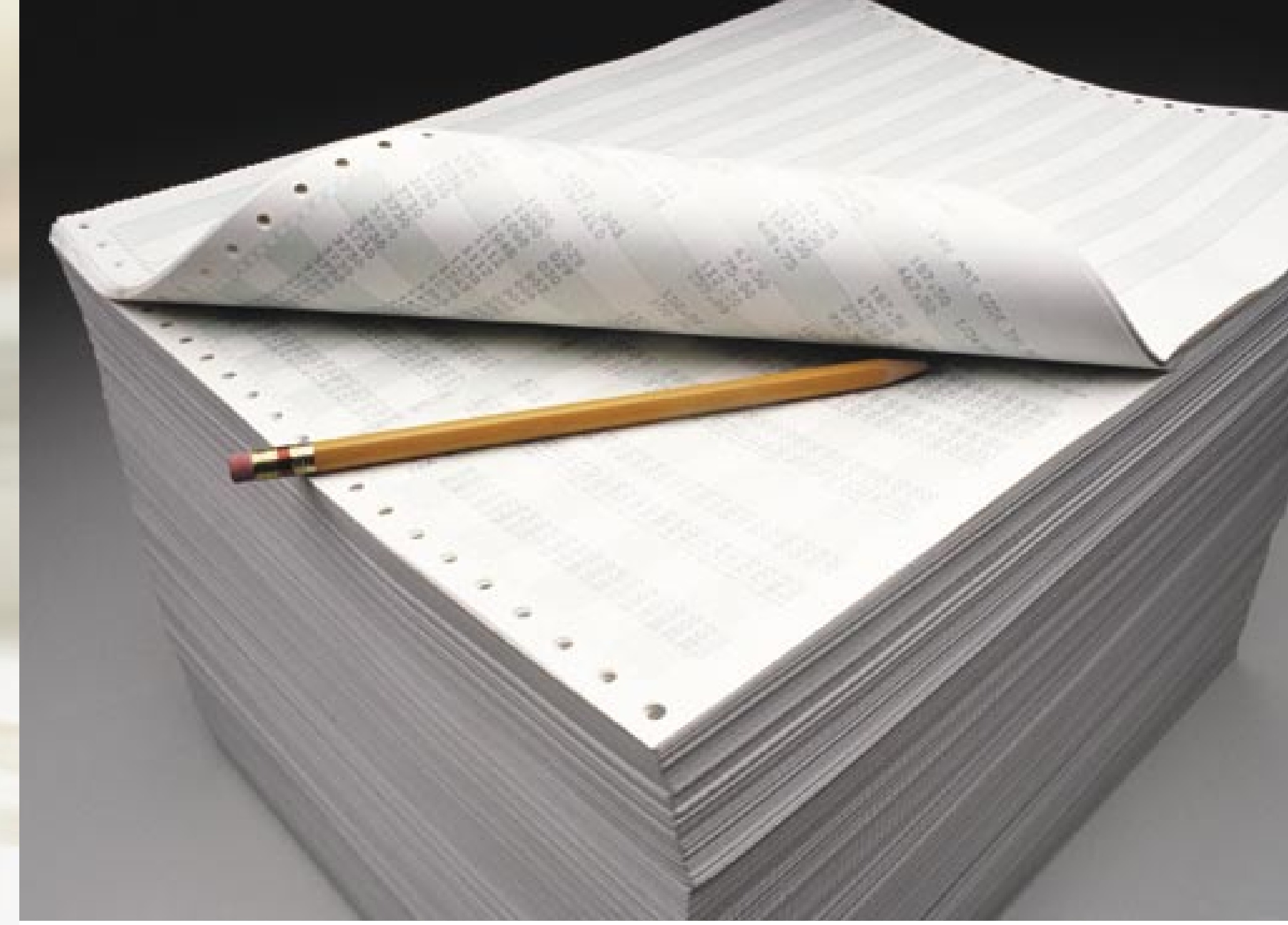
Mr. Hansueli Meili
Company: SHANGHAI RAIL GOURMET CO. LTD.
499 Tibet road North,Shanghai
Web: www.shrg.com.cn
Tel: + 86 21 5662 7106
Fax: + 86 21 6605 1077
名称: 上海捷美铁路食品配餐有限公司
地址: 上海市西藏北路499号
邮编: 200071
电话: + 86 21 5662 7106
传真: + 86 21 6605 1077

Mr. Geeske Venance
Company: ATLANTIC FORWARDING CHINA LTD.,
304–306, Electric Power Building, 430 Xujiahui Road, Shanghai
Tel: + 86 21 3406 0916
Fax: + 86 21 6472 8270
名称: 瑞士理运上海办事处
地址: 上海市徐家汇路430号电力大楼304–306室
邮编: 200025
电话: + 86 21 3406 0916
传真: + 86 21 6472 8270

Mr. Hans-Peter Bouvard
Company:
REICHLE + DE – MASSARI FAR EAST(PTE) LTD –SHANGHAI
Rm.1805, Huaihai China Tower Renmin Road 885,Shanghai
Web: www.rdm.com
Tel: + 86 21 6336 8383
Fax: + 86 21 6336 0030
名称: 新加坡瑞立远东私人有限公司上海代表处
地址: 上海市人民路885号淮海中华大厦1805室
邮编: 200010
电话: + 86 21 6336 8383
传真: + 86 21 6336 0030

Mr. Pietro Della Cà
Company: LEGARTIS S.A.
Via Massagno 20 6900 Lugano Switzerland
Tel: + 41 91910 6852
Fax: + 41 91910 6855
电话: + 41 91910 6852
传真: + 41 91910 6855

> The first results of the Swiss China Survey show clear differences in perceptions between Swiss companies with China experience and those not (yet) active in China.
> 瑞中专题调查的初步结果显示：
> 已拥有中国经验的瑞士公司和尚未涉足中国市场的瑞士公司有着截然不同的看法



Reasons for Doing Business in China:

Clear DIFFERENCES between SWISS companies with and without CHINA EXPERIENCE

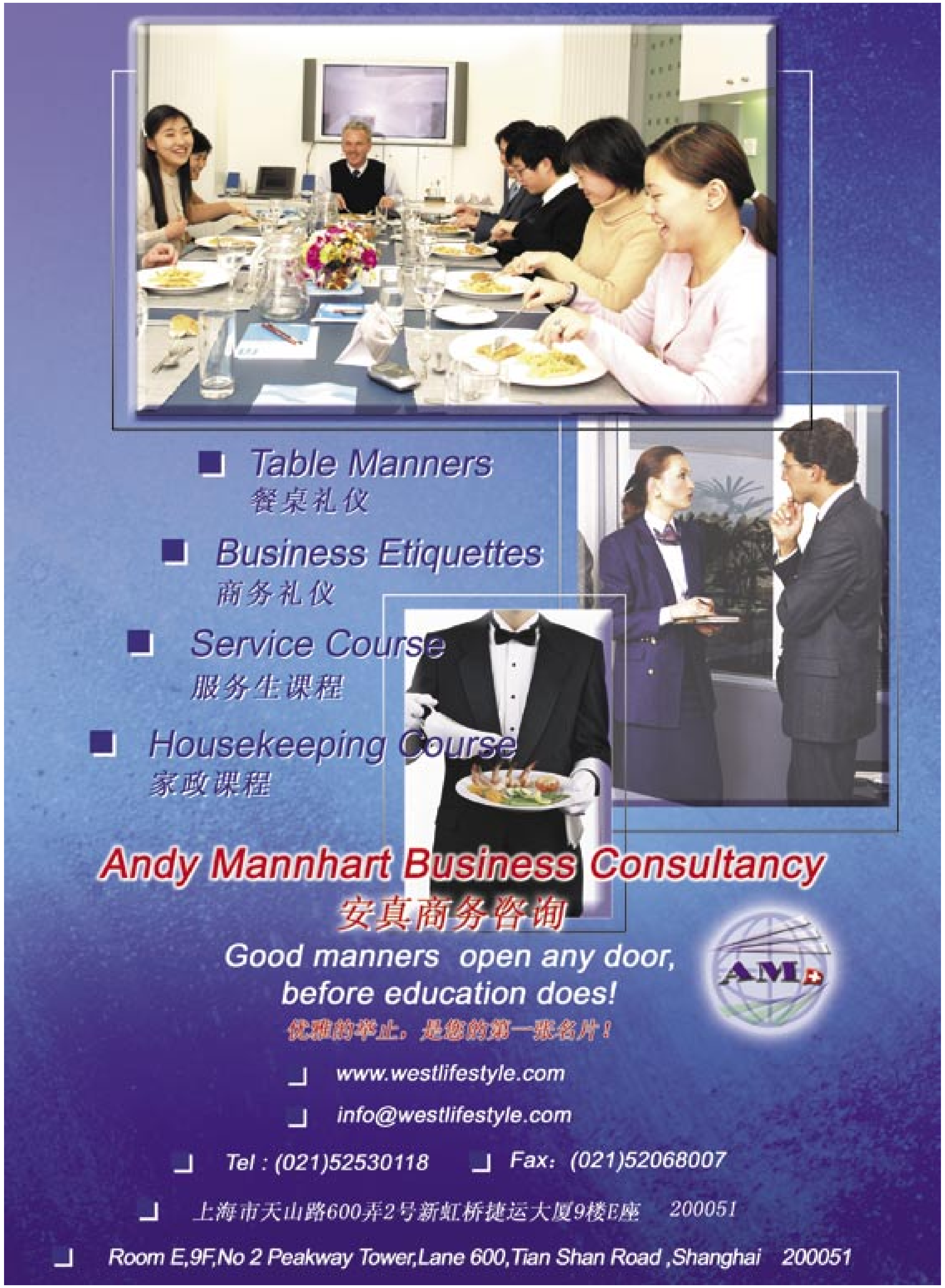
瑞士公司在中国发展的主要动机：已经进入和未进入中国市场的瑞士公司有着明显的不同

Swiss China Survey

CEIBS Joined the survey in February 2005 for academic support of case studies and statistical analysis

ETH Eidgenössische Technische Hochschule Zürich
Swiss Federal Institute of Technology Zurich

Britta Grünig, Communication & PR Swiss China Survey, b.gruenig@ch-ina.com, tel. + 86 21 6266 0844 extension 223
Britta Grünig, 瑞中专题调查 宣传与公共关系项目负责人 b.gruenig@ch-ina.com, 电话:tel. + 86 21 6266 0844 分机 223



Reasons for Doing Business in China: Clear **DIFFERENCES** between **SWISS** companies with and without **CHINA EXPERIENCE**

瑞士公司在中国发展的主要动机：已经进入和尚未进入中国市场的瑞士公司有着明显的不同

Initial findings of the survey on Swiss business activities in China suggest a need for first-hand information on the realities of the Chinese market environment.

Being offered a list of motivations to enter China, the participants of the survey were asked to weight them according to their priority. Results are summarized in the accompanying chart.

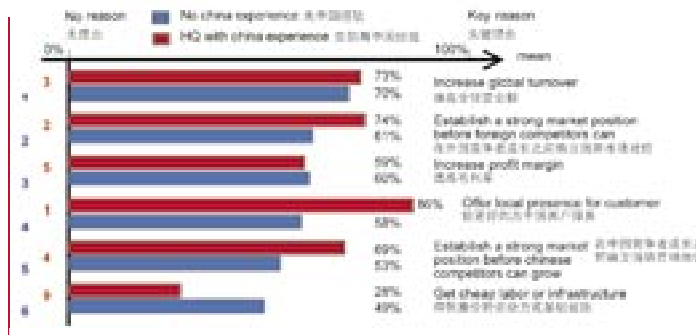
Managers of Swiss companies without China subsidiaries considered the following three reasons as of key importance to them:

- o increase turnover,
- o increase profit and
- o establish a strong market position to prevent other foreign firms from dominating the market.

These results indicate a strong interest in the market potential and reflect the concern of entering China too late, hence risking to lose a leading market position. A different picture occurs when the same list of reasons is weighted by managers of headquarters with China subsidiaries. The most striking change lies in the importance of local presence for the customer. This factor is only ranked fourth according to the preferences of companies that haven't entered China yet, but rises to the first position for those who have.

Successful firms in China value the opportunities for Swiss firms higher than the risks of set up in China. Differently from what firms without China experience might think, a big opportunity lies in the quality that Swiss firms can offer and doing research in China is an option worth to be evaluated. In order to minimize the risks, companies might consider focusing on quality to avoid margin erosion due to expected rising costs.

An Intermediate Report based on a first set of 117 answered questionnaires is available since end of January 2005. More answers to the survey are being gathered until March 31, 2005, under www.swisscham.org/survey, particularly on the Chinese side. Further analysis will address more aspects in the final report available by Mid-June 2005, including recommendations to firms, with a special focus on success factors of successful firms.



Reasons to enter the Chinese market 进入中国市场的理由

Opportunities and risks 机遇和风险

本次针对瑞士企业在华商业活动情况第一阶段的调查显示： 瑞士公司对有关中国市场环境实际情况的第一手资料有较大需求。问卷列出了瑞士公司进入中国市场的一系列动机，并要求被调查者按重要性依次排序。

在中国尚未设立子公司的瑞士公司经理们认为以下三个原因至关重要：

- o 提高营业额
- o 增加利润
- o 确立强势的市场地位以阻止其他外国公司控制市场

这些结果表明他们对中国的市场潜力很感兴趣，但也反映出对于因进入过晚而可能丧失市场领先地位风险的担心。对那些已在中国设立子公司的瑞士经理们而言，能更好的为中国客户服务是最重要的一点。这项排名从第四位上升到了第一位。

已在中国取得成功的瑞士企业则和那些没有中国经验的企业有着完全不同的想法。他们认为面临的机遇高于创业的风险，其中一个很大的机遇在于瑞士企业能提供优质的品质，除此之外在中国进行研发也是一个可选之道。由于有成本上升的可能，许多瑞士公司可能会通过提高产品品质量来避免赢利能力下降.

基于首批117份调查问卷的阶段性报告已于2005年1月末完成，本次调查截至到2005年3月31日。欲了解更多信息，请访问www.swisscham.org/survey。最终报告将于2005年6月中旬面世，报告中将对更多方面展开进一步分析，提供对公司的建议，并重点关注成功企业的经验。

News 新闻

A second round of data collection of the Swiss China Survey is under way to analyze how success factors vary according to the different circumstances of companies, their activities and market. The Swiss China Survey is led by OSEC Business Network Switzerland, the Swiss State Secretairat for Economic Affairs SECO, the Swiss Center Shanghai, SwissCham China and the Swiss-Chinese Chamber of Commerce in Switzerland.

Learn more about the survey and participate until March 31, 2005 under www.swisscham.org/survey

正在进行的第二轮瑞中专题调查数据搜集工作将会着重分析瑞士公司在中国的成功因素是怎样随着企业状况和市场及行业环境而改变的。

瑞中专题调查是由OSEC Business Network、SECO、上海瑞士中心、瑞中经济协会和中国瑞士商会等机构协同指导及举办。

敬请在2005年3月31日前通过以下网址查询及参与本次调查。www.swisscham.org/survey

10 Key Differences between Eastern and Western

东西方行为及思维模式的10大差异

Behaviour and Thinking

Westerners and Chinese, as members of different societies, undergo socialising processes unique to their specific cultural group. Existing cultural norms, with respect to values and orientations, help to determine patterns of behaviour and thinking in the individual. To enhance understanding, one should know details about the background of friends, colleagues, business partners or employees coming from another culture. Consulate General Hans Roth describes the most significant differences between European and Chinese cultural environments. His observations should be considered as a general guideline and do not, of course, replace the need for carefully examining any individual's characteristics and references.

根植于各自不同的文化背景和社会化过程，西方人和中国人不同的价值取向和价值观决定了二者不同的行为和思维模式。因此，想要更好地了解身边来自不同文化的人们， 必须深入理解他们的文化背景。瑞士驻上海总领事洪含雅先生在此描述的欧洲和中国文化环境的显著的差异之处，可以作为我们理解两种文化的指南，当然，对具体个人性格的观察了解也是必不可少的。

Behaviour Patterns

1. China is a collective society. This means that 'in-group' and 'out-group' differentiation is much more marked than in the West. 'In-group' behaviours are marked by strong consensus patterns. 'Out-group' relations rely on pure Darwinist survival and appear very cold or even brutal to Western eyes. A foreigner is never regarded as belonging to the group, which partly explains the difficult working environment for foreigners in China.

2. Personal relationships play a key role in any collective society. There is no abstract ethical system like in Europe. Morality is linked to the quality of the relationship. If this quality is bad cheating will be normal. If it is good it is more reliable than a relationship in the West. So even among criminals there might be a strong solidarity - or none at all.

3. Competitive behaviour is very common in this kind of system, even within the group. But an 'in-group' competition can switch immediately to a neat and closed co-operation if the group is attacked from outside. Competitive behaviour and closed ranks strongly mark Chinese behaviour patterns. Such competition takes place on individual as well as on group levels. The highest level of solidarity is that of the Chinese as an ethnic group. International solidarity is therefore even more difficult to be achieved than in a Western environment.

Personal relationships play a key role in the Chinese society

人际关系在中国集体社会中起着关键的作用

4.China is a collective mass society. Thus privacy is very strongly reduced. Everybody knows everything about everybody else. This makes life for foreigners, used to less limited individual space and privacy, not always easy.

5. Chinese usually act in accordance with the group. Self-responsibility is therefore rarely taken. Responsibility lies with the whole group.

Thinking Patterns

6.Chinese thinking envisions reality as a constant flow, whereas Western thinking understands reality as a sequence of static moments. The Chinese see reality as a film, a Westerner as a sequence of photographs.

7. Chinese consider reality in a synthetic way. The dialectic process of analysis (thesis, anti-thesis, and synthesis) has never been made. Chinese reality is thus not analysed. It is grasped in an intuitive way. It remains, therefore, quite undifferentiated, but paradoxically enough, much more precise at the same time. The assessment of reality by all the senses leads to a much deeper understanding of the actual moment.

8. Chinese thinking is thus concrete and pragmatic, it does not analyse reality. Given the short spatial and temporal horizons, Chinese thinking is concentrated on the actual moment in the actual situation. This kind of thinking conflicts with a Western-style rational planning process. It has, however, the big advantage of a complete feeling of reality at a particular place and time. Furthermore, the future is seen in a visionary way, with full confidence that the development of time will actually show the ways to realise these visions.

9. Being synthetic, Chinese thinking has no problems in integrating contradictions in the understanding of reality. Western thought has considerable problems with this. In fact, from the point of view of the Western mind, the Chinese way does not seem to be logical and rational. For a Westerner, it is hard to understand something as positive and negative at the same time. For the Chinese, however, the presence of yin and yang at every moment has a long philosophical tradition. There is no concept of an either/or. The two, rather, always go together and characterize reality by their contradictions.

10. Chinese thinking does not accept absolute and eternal truths. Whether something is still true tomorrow, the reality of tomorrow will show.

行为模式

1.中国是一个集体社会，其群体内外的差异远大于西方社会。团体内的行为表现为高度的和谐一致，而团体外的关系则完全遵循达尔文的物竞天择理论。这种关系在西方人眼中十分严酷，有时甚至近乎残忍。一个外国人是不可能被看作团体一员的，这也是他们感觉工作环境艰难的部分原因。

Chinese thinking is concrete and pragmatic

中国式的思维是具体而注重实效的

2. 人际关系在集体社会中起着关键的作用。这里不存在类似欧洲的道德体系。道德取决于关系的好坏，如果关系不好，欺骗理所当然； 而如果关系友好，则比西方社会更值得信赖。因此，即使是犯罪团伙，有时候也相当团结一致—–或者恰恰相反，完全是一盘散沙。

3. 集体社会中的竞争行为相当普遍，即使团体内部也不例外。但当团体受到来自外界的攻击时，内部竞争可以立即转化为精诚紧密的合作。竞争和一致对外的封闭团体是中国行为模式的鲜明特点。这种竞争存在于个人之间，也发生在团体之间。中华民族的紧密团结是最高级别的对外团体，因此相比西方社会中国更难以实现国际性的团结合作。

4. 中国是一个人口众多的集体社会，因而个人隐私空间被大大缩减，事事尽人皆知。对于习惯于一定个人空间和隐私的外国人来说，这种生活往往并颇为不易。

5. 中国人通常依据团体准则行动，个人很少有责任感，而通常采用集体负责制。

思维模式

6. 中国式思维认为现实是不断流动变化的，而西方思维则把现实视作一系列静止的瞬间。也就是说，在中国人眼中现实是一部电影，而在西方眼中它是一系列的照片。

7.中国人采用综合的方式反映现实，从不运用辨证分析(论证、反证和综合)的过程。因而他们用直觉感知现实，而不是分析现实。对现实的反映因此是笼统同时又相当似是而非的，反而在某种意义上更为精确。这种由所有感觉综合得出的对现实的评估使得对具体片刻的的理解更加深刻。

8. 中国式的思维因而是具体而注重实效的，并不注重抽象分析。在有限的时空，中国式的思维集中于实际情境下的实际片刻。这种思维方式在西方式的理性计划过程中举步维艰，然而其优势在于，对于特定时空的现实的能够有完整全面的反映。此外，中国式思维用想象构画未来，并坚信， 随着时间的流逝，事物的发展会水到渠成地实现其构想。

9. 中国式的综合的思维模式可以轻而易举地在整合矛盾中理解现实。这一点对于西方式思维难乎其难，因为中国人的思维方法在西方人看来似乎是不合逻辑和非理性的。一个西方人很难理解某一事物同时既是正面的，又是负面的。而对于中国人来说，阴阳共存的哲学观念已经由来已久。阴和阳从来不能单独存在 ，二者总是并存并且通过阴阳矛盾反映现实。

10. 中国式思维不接受绝对和永恒真理。今天的真理，明天依然要通过现实的检验，方可知其真伪。

Shanghai, Winter 2004　Text：Hans J. Roth

2004年冬于上海　作者：洪含雅

LIFE & CULTURE 生活文化专栏

Margrith A. Lin-Huber has done comparative research on the acquisition of language in different cultural environments. Some of her main findings and other useful stories and explanations about Western contact with the Chinese culture can be found in her book "Chinesen verstehen lernen", which is published in German by Verlag Hans Huber, Bern.

Margrith A. Lin–Huber对不同文化背景下的语言习惯做了大量的研究和比较。在她的著作《学会了解中国人》（由德国Verlag Hans Huber, Bern.出版发行）中可以了解到她关于西方人接触中国文化的一些研究成果和实例说明。

Maybe you have had this kind of experience: You meet a Chinese business partner for the first time face to face. Previously, you knew each other only through mail, faxes or phone calls. However, at this first meeting he has a lot of questions to ask you. After a while, there are some questions that are not only about business and some of these questions are completely unexpected. For you, some of these are too intimate and definitely do not belong in the first encounter. Following are some explanations about Chinese Conversational Openers that may help you put these questions in the right context.

The Chinese feel warmer, when family information is swapped

有关家庭的话题会使中国人感到亲切温暖

In early 1901, the editor of a Western business newspaper advised foreigners regarding contacts with Chinese: "It is not at all impolite to ask questions about the personal situation of strangers. On the contrary, it is seen as a sign of politeness towards the foreign guests if you are asked, 'Are you married?'"

This is still true today, and if your business partner knows that you are married, the initial question may be about your family life, and especially about your children. Family is the center of a Chinese person's life. The Chinese feel warmer toward other people when family information is swapped. It's a good way to show mutual understanding. The Chinese think it is easier to create a friendly feeling in this way. Only once each one knows more about the other should business matters be dealt with, as this is considered the basis of trust.

In the Western world, opening conversational topics tend to be impersonal during the initial stages of contact. Therefore, Westerners are not used to these personal conversational styles when opening a conversation. In particular, there is one form of typical Chinese greeting which may be difficult for Westerners to recognize as a conversational opener. The Chinese often make casual comments about whatever another person is doing at the moment, formed as polite questions. They ask, "Are you going to work?" when you are leaving your apartment in the morning. Shang na er qu?» (Where are you going?) is a typical greeting which occurs when passing another person in a building or meeting on street. If you meet an acquaintance on the street, and you are dressed up, he may ask you: «Are you going to a party?» If you are cleaning your desk, and someone passes and see you, they say: «You are cleaning your desk. Are you leaving for a journey?" If you are holding an envelope in your hand, a Chinese workmate will say: "Oh, did you get a letter?" Perhaps he will add: "Is it from home?".

Westerners find such questions worrying or disturbing. They find them a nuisance or importunate, in any case, impolite. They often don't understand that these are not intended as questions requiring answers. They are part of the ritual of making an acquaintance. With this type of casual comment the Chinese person only wants to show acknowledgment and solidarity.

I was once confused by the fact that every evening when I came home from work, my neighbour would ask me: "Mr. Lin, is he at home?" This question always left me wondering. I thought that maybe my neighbour wanted to ask my husband for a favour and so I replied that I would go and see if he was at home or not. Now I am used to this friendly kind of greeting.

Questions like "Where are you from?" or "Where are you going?" are common conversational openers in polite Chinese communication. Westerners are not used to these kinds of greetings and often respond by giving detailed explanations. These statements will, in turn, confuse the Chinese partners, who never really expected a true answer. It is important to understand that these are not genuine questions and you should respond to these kinds of greetings in vague terms. You needn't indicate your destination when you are asked about it. Also, you need give no precise information when greeted with the formulation "zai na-er fa-cai?" (Where do you get your riches at this moment?) - a greeting which is being used by younger people in modern times. Another common form of greeting that may cause misunderstanding is "chi le ma?" (Have you eaten?). This saying normally occurs around mealtimes. It is neither a curious question about your eating habits nor an invitation for lunch. The meaning of this greeting goes back to the time of the famines. It carries a special kind of sympathy because it was not obvious that people HAD eaten. To the ears of native English speakers it sounds like the opening phrase of an invitation. A British lady working as an English teacher in China reported her first encounter with this greeting. Shortly after arriving in China, without any idea about the language and culture, she was very confused when a bank clerk asked her if she had had her lunch. Educated in the British culture, she regarded this question as an indirect invitation to lunch, and between unmarried young people it indicated the young man's interest in dating the girl, whereas the young man was merely being polite.

也许你会有这样的经历：你初次与一位中国商业伙伴会面，虽然之前你们只是在电邮、传真或电话中有过接触，但就在这第一次的会面中他就问了你许多的问题。没过多久，这些问题就开始不着边际，谈话已超出业务范畴。一些你认为绝对不该在首次会面中就涉及的问题更令你始料未及。下文所谈到的内容也许可以帮助你更好的理解中国式的开场白。

早在1901年，“西方商报”的一位编辑就曾提醒那些与中国人打交道的外国人：“在中国，询问陌生人个人状况并不是件不礼貌的事情。相反，如果外国人被问及是否已经结婚，那是一种礼貌的表示。”如今在中国，如果对方知道你已经结婚了，那么第一个问题就可能是关于你的家庭生活，特别是孩子。这是由于家庭是中国人生活的核心，若话题涉及到家庭情况，他们会感到很温暖。这也是表达同情心的一种方式，同时也是增进与中国人的友谊的途径。只有将信任建立在对彼此更多的了解上，才能更好地促进商贸往来。

Some questions leave Westerners wondering

有些话题让西方人感到困扰

西方人在早期接触时，初次谈话的话题一般不会涉及私人生活。因此，西方人不习惯开场白就谈及私人问题。作为谈话的开头，有一种典型的中国式问候实在难以被西方人接受。作为一种礼节性的问候方式，中国人经常对于他人正在做的某件事情添加一些随意的说明。当你早上出门时，他们会问“去上班啊？” 当在楼里或街上与认识的人擦肩而过时，通常会问候一声“上哪儿去？”如果你在路上遇见一位熟人，而你当时穿得十分讲究，他就会问：“你是去参加聚会吗？”如果你在擦桌子，此时有人经过看到了，他们会问：“擦桌子啊，你要去旅行吗？”如果你拿着一个信封，你的中国同事会说：“噢，你收到一封信？”可能他还会加一句：“是从家里寄来的吗？”

西方人对这些询问感到很困扰，认为这些问题是令人厌烦的，也是不礼貌的。他们并不了解其实根本不需要回答这些所谓的询问，这只是一种约定俗成的习惯性问候。中国人在提问里添加的这些随意的说明仅仅是要表示相互间的亲近和对彼此关系的肯定。

以前每次我傍晚下班回家，邻居总要问我：“你先生在家吗？”我对这个问题感到很奇怪，一直以为邻居是要找我丈夫帮忙，于是我回答说让我去看看他是否在家。但现在我已经习惯了这种善意的问候方式。

在中国式的交谈中，一些类似于“你从哪儿来啊？”“你要去哪儿啊？”的问题是司空见惯的开场白。西方人不习惯这种问候，更不习惯一开始就详尽地解释他们要去干什么。而这又让中国人感到困惑，他们并不期待对方回答这些问题，实际上这根本不是真正的提问。你含糊的应答就已经足够了！当被问及去向时，你无需指明目的地。同样地，在被问到“在哪儿发财？”这类在当代年轻人中流行的问候语时，你也不必给出精确的回答。另外一种经常被误解的问候语是“吃了吗？”。这句问话通常出现在用餐时间，它并不是要打听你的用餐习惯也不是向你发出共进午餐的邀请。这个问候的含义可以追溯到饥荒时代，它包含了特别的同情之情，因为并不清楚对方是否吃过了。而在那些以英语为母语的人听来，这象是邀请的前奏。一位在中国执教的英国女教师谈到了她第一次遇到这个问候时的情形。刚到中国时，因为对中国语言和文化一窍不通，所以当一位银行职员询问她是否吃过午餐时，她觉得非常诧异。根据英国的文化习惯，这是间接地邀请她共进午餐，而如果这个提问发生在两个单身的年轻人之间，那就表明那位男士有意约会那个女孩。

Text/ 作者：Margrith A. Lin–Huber
Translator/ 翻译: Joyce Sun 孙科涵

A New Perspective on International Business
国际商业新视点

Swiss Professor Dr. Stephan Rothlin from Beijing's UIBE university shares insights into business ethics, Chinese perceptions and domestic business practices

来自瑞士,现执教于北京对外经济商贸大学的 Dr. Stephan Rothlin 教授,向《桥》杂志阐述了他对商业伦理,中国人的商业理念以及国内商业运作模式的深刻见解。

Interview 访谈主持: Martin Regnet/ 任天翔

THE BRIDGE: You are a Swiss professor of business ethics in China. What is the most fascinating thing about your job, with respect to this special topic, in a Chinese environment?

Rothlin: It is truly fascinating to try to understand economic development in a Chinese environment and figure out which vital values could be taught and implemented in order to make this development sustainable. The special charm of the Chinese environment is the mixture of traditional elements with a great flexibility and openness to new insights and know–how.

Please give us concrete examples of questions concerning business ethics.

Business Ethics used to be developed primarily for the American and European environment. As we now develop international business ethics, we attempt to bring into play a more truly international perspective, especially with respect to including Asian views. This new academic discipline is very practically oriented and analyzes case studies from all over the world. Recently, different cases of accountancy fraud have drawn wider attention to the fact that an improvement of ethics is very much needed. Just look at the cases of Parmalat, Vivendi, Enron/Andersen and Yinguangxia*, which left in their wake a furious crowd of stakeholders who felt cheated and abused.

What is the Chinese reaction to these kinds of topics?

I deal mainly with Chinese MBA-students in Beijing, Singapore, Taipei and Bordeaux, who often feel frustrated with outdated or even corrupt business practices and therefore decide to start studying again. I would guess that the younger generation, those in their thirties and forties, strongly support the central concepts of international business ethics. But there are, of course, business people who, for various reasons, deeply dislike ethics as they only seem to be concerned about increasing their profit – sometimes at any (human) cost. They deeply hate it if somebody questions why they continue to trample on other people.

Do you integrate Asian perceptions into your research as well?

Business ethics used to be dominated by Western philosophy (Kant, John Stuart Mill etc.). In my books, I try to include Asian perceptions as well, in order to make an ethical approach acceptable to Asian readers. I even like to think that the Asian contribution is vital for the further development of international business ethics.

桥：作为一位在中国研究商业伦理的教授,您认为在这样一个环境里研究这么个特殊的课题,其中最精彩的部分是什么?

Rothlin: 确实,研究中国的经济发展是件十分有意思的事。找出其中值得借鉴的宝贵经验并且贯彻执行,从而使得这种发展可持续进行。中国环境的特殊魅力就在于,它将传统理论元素和对新兴观念及知识灵活开放的接收融合到了一起。

请给我们列举一些关于商业伦理的具体事例。

商业伦理过去是欧美商业文化的产物。如今,随着国际商业伦理规则的发展,为使其真正国际化,更有必要吸纳亚洲地区的观点。这一新兴的学科极具实际导向价值, 并可以用来分析世界各国案例。而今,各种会计丑闻案更显示了促进商业道德规范的必要性。看看 Parmalat, Vivendi, Enron，Andersen, 以及银广夏（*）,他们的欺诈行为激怒了大批受骗的股权持有者。

中国人对这些议题有何反应?

我接触的大多是在北京,新加坡,台北,和波尔多攻读MBA的中国学生。他们经常为那些过时甚至腐朽的商业惯例感到悲哀和遗憾,因此而决定来重新学习。我认为这些三，四十岁左右的青年一代是支持国际商业伦理规则发展的主力军。然而,也有部分商人因为各种原因非常不喜欢这种道德规范,他们关心的只是持续增长的利润,有时更为此不惜任何代价。他们极其痛恨被质疑践踏他人的利益。

您会把亚洲人的观点也融入到您的研究中去吗?

商业伦理这一概念一度属于西方哲学的范畴(Kant, John Stuart Mill等)。在我的书里,我要把亚洲人的观点也归纳进去,以适应亚洲的读者。我甚至认为亚洲对未来国际性商业伦理标准的发展将起到至关重要的作用。

Where do you see the greatest cultural clash in Western and Eastern business practices?

There is a wide variety of Eastern business practices. But it is true that there are still quite a number of business people in Asia who are convinced that backdoor deals and corrupt kickbacks are an integral part of "Asian culture" and strongly pressure their counterparts into believing this fiction. I recently met a Chinese businesswoman who came back truly shocked by the widespread backdoor negotiations which are sold sometimes as an "unavoidable ingredient" for striking deals. The lack of transparency in certain transactions is sometimes very disturbing. Therefore, I think that the WTO offers a real opportunity for Western and Asian partners, with its framework of rules for sound business practices that are followed without corruption and with the necessary transparency.

An often repeated statement from foreigners is that the Chinese are very complicated in negotiations. Is there an explanation for that?

It takes a very long time to understand how Chinese negotiate and it seems to be necessary to rely on trusted advice. After more than six years in and around China, I have had rather positive experiences due, in particular, to the fact that I received valuable advice from Chinese friends. Eating always plays a role. And some Chinese hate to merely strike a business deal. When they are interested in long-term cooperation, they tend to check out their counterpart very carefully. In this sense, just remember a common Swiss behaviour pattern: the Swiss farmer is known to check out a cow very carefully before he actually buys it.

Currently, China faces severe pollution of the air, water and environment. Can business ethics help to improve this situation?

I very much hope so, but I admit that it seems that this topic is not considered a vital part of business ethics and business strategy. Just a simple indicator: since 2001 I have directed a series of translations of business ethics textbooks into Chinese, in cooperation with Professor Yang Hengda and Peking University Press. All the books we have published so far are, to our astonishment, hot sellers – except the one on Environmental Ethics. It is, therefore, urgent that we convince as many players as possible to seriously implement environmentally-friendly policies.

There are concerns that foreign investors face intellectual property violations in China on a larger scale than in other parts of the world. What is the Chinese reaction when they are confronted with requirements of intellectual property protection by foreign investors?

We have to bear in mind that the idea of intellectual property was, for a long time, a foreign concept in China: You copy someone's calligraphy – so what? But nevertheless, I find we are seeing more and more an awakening, although sometimes quite slow, to the fact that intellectual property protection is an essential part of the WTO agreement and, as a global player, China has to comply with these rules.

How could this problem be solved from the perspective of business ethics?

Rothlin: I highly value the dialogue between business ethics and economics. Now, from the perspective of business ethics, you can explain how many of the so-called "stake-holders" actually lose an enormous amount of money if intellectual property rights are continuously violated.

Dr. Stephan Rothlin, Research Professor, CIBE, Center for the Promotion of International Business Ethics at the UIBE, University of International Business and Economics, Beijing

His book "Becoming a Top-Notch-Player. 18 Rules of International Business Ethics", Beijing, Renmin University Press, 2004, is available in bookshops all over China.

Stephan Rothlin博士，教授，在北京对外经济贸易大学国际商业伦理促进中心从事研究工作。

他的著作《终极赢家的18项伦理修炼》，2004年由北京人民大学出版社出版，现已在中国各地发行。

您认为东西方商业惯例存在的最大的冲突是什么?

东方的商业惯例种类繁多。但不可否认相当一部分在亚洲经商的人士认为暗箱操作和收受回扣等腐败作风正是“亚洲文化”的主要组成部分，同时也迫使他们的合作伙伴相信这一虚构的论断。最近我遇到一位中国女商人表示对秘密交易之风的盛行非常震惊。而这种秘密交易更被当作是进行大宗买卖不可避免的环节。缺乏透明度的交易令人非常困扰。世贸组织为此提供的合理的商业规则构架，在杜绝了腐败漏洞的同时也促成了必要的交易透明度。这将为亚洲和西方的商业伙伴迎来一次真正的发展契机。

在中国的外商似乎普遍认为与中国人进行商业谈判总是很复杂。您是如何解释这一现象的?

了解中国人的谈判习惯是需要很长的一段时间，而寻求可靠的建议也是必要的。通过在中国六年多的体验，加上从中国朋友那里得到许多有价值的建议使我对此问题报以乐观态度。例如，饭局仍然扮演了重要角色。有些中国人讨厌直截了当地敲定一宗生意。如果有长期合作的打算，他们更会对其合作伙伴进行仔细的考量。就象瑞士的农户在最终决定买一头母牛前也会对这头牛做细致的检查。

目前，中国面临着严重的大气，水等环境污染问题。商业伦理规则是否能改善这种情况?

但愿如此。可我必须承认，这并不是商业伦理和战略的最重要部分。通过一个简单的事例就可以看到这一点：从2001年起，我与杨教授及北京人民大学出版社合作翻译了一套商业伦理规则系列丛书。令我们感到惊奇的是，到目前为止，这套书中除了关于环保道德规范的那本，其他所有出版的书仍在热卖。由此可见，让更多的人认真贯彻环保条例已是迫在眉睫。

外国投资者在中国遇到的知识产权纠纷远远大于其他国家。这一现象早已引起极大的关注。而中国对于外国投资者要求保护他们的知识产权又是做何反应的呢?

我们必须认识到在中国，知识产权在很长一段时期内曾是一个陌生的概念：仿冒一个签名有何妨? 然而，尽管进度缓慢，但我们正在促使这种意识的苏醒！ 保护知识产权是世贸协议的重要组成部分，作为全球化组织的一员，中国必须遵守这些条例。

从商业伦理的角度看，如何来解决这个问题呢?

我高度重视商业伦理与经济学的相关性。现在从商业伦理角度考察，你就能够解释如果任由知识产权遭受侵犯，将有多少所谓的股权持有者蒙受巨大的经济损失！

* Yinguangxia was accused of having committed severe fraud with false annual reports. After being fined 600,000 RMB by the China Security Regulatory Committee (CSRC) on May 14, 2002, the Shanghai-listed Yinguangxia has been sued by over 1,000 local stockholders. This case was named the "Chinese Enron" by some reporters (though the financial dimensions are much different).

银广夏被指控在年度报表中存在严重欺诈行为，于2002年5月14日被中国证监会判定罚款60万元人民币之后，在上海证券交易所上市的银广夏公司又遭1000多当地股民控告。这一事件被报道称为“中国的安然事件”（虽然两者在涉及金额上相差甚远）。

CHINA's Global Emergence:

Macro-economic Data, Trends, Consequences and Strategies for Swiss Enterprises

This article traces trends related to China's development, emphasizing the pressure that this developing nation may well exert on the global economy. The consequences for Swiss enterprises, particularly for SMEs, are of major importance. Coping with competition from Asia and benefiting from the situation in China are challenges which need to be addressed in order to remain globally successful in the coming years and decades. Paradoxically, Switzerland's high quality, but costly, production structure better places its economy, relative to other industrialized nations, in a position from which it can benefit from China's development. Nevertheless, it is time for Swiss niche leaders to develop their strategies to take a strong position in China and Asia so as to achieve long-term global success. In so doing, they will keep generating the margins and the innovation that support the Swiss quality of life.

Supermarket and workshop of the world

After having conquered the market with mass consumer goods (clothing, household appliances and electronics), China is now exporting more and more industrial components, machinery and other equipment.

China already produces 80% of all tractors used on the planet; 60% of the penicillin; 50% of the vitamin C; 70% of all VCDs; 50% of all telephones; 60% of all artificial diamonds; and 75% of the world's watches (among other things) *[1].

In the last 10 years China has become a gigantic workshop for the world where all sorts of products are manufactured more and more competitively. The People's Republic is taking on the role that Britain had around 1830, which was, in turn, taken over by the USA in the early 20th century*[2]. Interestingly, both Britain and the USA became dominant world powers towards the end of the 19th and 20th century, respectively.

With the abrogation of the global multi-fibers agreement and the removal of textile export quotas at the end of 2004, China is now expected to create severe competition. Even the poorest of textiles producers, such as Indonesia, will have to adapt. Some expect China's share of world textiles output to jump from 30% to 50% in a couple of years, or even sooner. And while China's world market share of low-tech items grows, the country is already producing one third of the world's mobile phones, at the high end of the technology spectrum.

China's ability to produce competitively, on a massive scale, both the cheapest and also some high-tech products, is made possible by the size of China's working population and by the staggered economic development of the country, from coastal East to inner West. To understand China's potential impact on the world it is essential to realize that it is far from being one market. It is actually a composite economy at different stages of development in different areas, from the very advanced in Shanghai to less advanced in parts of Tibet. The underdeveloped low cost areas are able to provide competitive low tech products, feeding into the technology chain. The developed areas, in turn, produce competitive high-tech products.

Low production costs are here to stay

300 million Chinese (a population about the size of the USA) live in cities*[3]. An equivalent number is estimated to have benefited from the economic development of the past 25 years. Yet, at least one billion (if we consider unofficial estimates) have seen minimal or no improvement to their lifestyles. They are waiting and hoping for better economic opportunities. Bringing prosperity to this billion farmers is not an easy task. In joining the WTO, China has lowered its tariffs to the point where soy beans, for example, are cheaper when imported from the United States than when homegrown. To cope with the competition generated by China's integration in the world economy, her government is planning to urbanize 300 million surplus farmers in the coming 15 years. This will, again, create a population roughly the size of the U.S. that will be added to urbanites already looking for work. Unemployment in Chinese cities is growing5. To cope, families have placed education as a top priority, slowly but surely creating greater competition in the job market. In Shanghai, for example, fresh graduate students' salary expectations dropped an extraordinary 30-50% in 2004 from a year earlier*[4].

After mostly negative or very low inflation from 1998 to 2003, the consumer price index increased about 4% in 2004 and will probably rise as much in 20055. Yet these increases are probably greatly due to global increases in energy and commodities prices. At any rate, they do not influence the competitiveness of Chinese goods worldwide, as is shown by a constant increase in Chinese exports. Many expect the Chinese currency (renminbi) to be reevaluated soon to reach a fairer international trade balance. Yet, such an adjustment would actually contribute to the steady loss of value of the US Dollar to which the Chinese currency is pegged. Besides, such a currency appreciation is bound to remain low, considering the additional pressure it would bring to Chinese farmers, already competing with American agricultural products. Yet, even if the renminbi increases relative to the rest of the world, it is very unlikely that China's cost level would rise until her surplus labor is absorbed, say within the next 10 to 20 years.

Economic superpower candidate

A current middle class of about 100 million consumers is expected to grow to between 400 and 500 million by 2012, making China's market bigger than the USA*[5]. Meanwhile, the need for equipment to satisfy the production needs of this new "workshop of the world" is already presents considerable opportunities for developed economies such as Switzerland. To provide sufficient work opportunities to China's population her economists estimate that growth needs to reach a minimal annual rate of 7% for the next decade. GDP grew 9.5% in 2004 and is expected to reach 7.7 to 8.5% in 2005*[6].

As a matter of fact, quick and consistent development in China is made necessary by dire social circumstances. Citizens' complaints have steadily increased over the last decade*[7]. Economic development is not only «the irrefutable argument», as advertised on billboards in Shanghai. It is the main priority of the Chinese government to keep the one billion citizens of undeveloped China waiting quietly for a better life.

Yet, this works to our benefit. China's much anticipated domestic market is finally becoming a reality for Switzerland too. Since 2001, China (including Hong Kong) is buying more Swiss goods than any other nation in Asia. The bilateral trade balance (including Hong Kong) showed almost CHF 3.4 billion in favor of Switzerland in 2003. Moreover a 12% increase of imports by China and Hong Kong is expected to be confirmed for 2004.

Astonishingly, 40% of respondents in China to the Swiss – China Survey 2004 (see page … in this magazine) estimate that China will represent the most important economic area for their businesses within 5 years. The same research also clearly shows that low production costs are a far less important reason to enter China than acquiring local market share and preventing the development of competition*[8].

Unless the current development process is halted by social, political, financial or unpredictable obstacles, all signs indicate that China will become the biggest world market and first economic power, be it in 20 or 50 years.

Future R&D powerhouse

Ironically, high Swiss production costs, and the resultant shedding of labor intensive jobs since the 80's, have put Switzerland in a better position than her European neighbors (for the coming decade at least) to withstand the shock of permanently cheap Chinese products. Besides, Switzerland is well positioned to tap opportunities for the sale of equipment, one of its economic pillars and its major export to China (60%). Overall Switzerland has more to gain than to lose from China, as bilateral trade figures clearly show. Yet, if only through the constant pressure on prices and margins, the economic transformation of China will have deep global effects in all branches that are not luxury, high technology or containing a high level of well-protected intellectual property.

Particularly important to consider is the increase in Research & Development (R&D) activity in China. With the development of production it is only natural that R&D follows. Large research centers have been opened by most multinationals over the past 2-3 years. Domestic patents applications are growing at a rate of 20-30% per year*[9]. China was fifth worldwide in the publication of scientific papers in 2003 (a yearly growth of 20.6%) while citations of Chinese scientific articles has increased by 30 to 40%*[10]. From a Swiss perspective, R&D in China is seen as a key opportunity. This was made clear by the China-based respondents to the Swiss – China Survey 2004. Many even see R&D in China as a chance to innovate faster in China than in Europe*[11].

Japan's development from a good producer of copies to a world class creator of technology may shed light on the path that China will follow. A key difference, however, is that China's costs will take much longer to rise due to the aforementioned developed and very large undeveloped economy that coexist, giving it an unprecedented cost advantage for a long time.

Impact on International SMEs

Chinese producers are a major source of competition in consumer goods. More and more, they dominate this sector of industrial production, in volume at least. After supplying brands as OEM producers, they are actively developing their own brands or finding shorter routes by acquiring foreign ones. (The purchase of IBM by the Chinese maker of PCs - Lenovo - is an example of what is to be expected.)

Yet, in many key areas of consumer goods (automotive, telecommunication & IT, life sciences), China's market is dominated by foreign players. Nestle, Roche, Firmenich, VW, Nokia (to cite only a few) all command impressive China market shares in their specialties. While the Chinese consumer goods market is the domain of large companies and mostly a battleground for known Chinese and established international titans, the supply of equipment to China, also to local foreign enterprises, is a market in the making, presenting considerable and growing opportunities for Swiss SMEs.

The smaller the SME the more the timing is important. Small firms cannot afford to invest too early and then wait for returns. Yet it is safe to say that it is not too early for most international companies to commence activities in China. In any case, an evaluation of the specific market would be advisable for most firms. In the words of Heinrich von Pierer, former CEO of Siemens, the risk has become bigger not to be active in China than to be. As implied in this quote, not serving China's market early enough entails the risk of witnessing Chinese firms growing domestically and then acquiring the local market. In the case of equipment, domestic suppliers can provide foreign multinationals in China, and their Chinese competitors, with cost-competitive, domestically-made equipment and local service. When they can service international companies in China, these suppliers will obviously start to export and become players to reckon with in world markets. They may possibly even become fierce competitors to the Swiss niche champions.

Conversely and in the longer term, being successful in the Chinese market will be needed to achieve economies of scale and competitive production for global leadership. This can be likened to the present need to be successful in the EU and the USA to keep a global market leader position. Yet, it is safe to say that considering its market potential, China's market leadership will eventually contribute in a key way to global leadership in a particular product.

Only the development of the rest of Asia, particularly India, may reduce the extent of China's global preeminence as a world market and production base. Yet, China's current head start in Asia and her key advantages (highest market potential and best quality/price ratio, both in a wide range of products) will ensure that virtually every non-luxury or top-tech product will be more effectively produced in China for China. As a result, virtually every producer with an international activity may expect to face a serious competitor from China in the future, if not yet.

The consequence of globalization and China's emergence as the workshop of the world and the future economic superpower mean that every international enterprise, including SMEs, will not be able to ignore China: they will eventually need an Asian production base, at least, to serve China competitively. Setting up production in China will offer the advantage of being in the key market of the region. To take additional insurance for a future successful global business, Swiss SMEs might as well aim at achieving a leading position in China and reduce the risk of facing Chinese competitors internationally, in the future.

Innovation: a must for enterprises in Switzerland

Establishing a successful Asia/China strategy may go a long way to develop business and prepare for the future. Serving global customers in different locations or offering a bigger range of products made possible by cheaper Asian production will support production back at home. Studies show that firms which delocalize maintain a bigger workforce at home than those who do not.

Yet it may not be enough for the home operation to overcome lasting price pressure from emerging countries. To keep production competitive in the mother company, many Swiss firms will need to keep innovating fast, to develop new technologies, products, manufacturing processes and new business strategies.

However, in order to guarantee technological innovation, maintaining production in Switzerland will be crucial. Technology is intimately linked with industrial activities. It only lives on and makes innovation possible as long as production goes on.

Moreover, since technologies feed and grow on each other, maintaining a healthy, varied and dense fabric of production technologies at home will be vital for the development of Swiss innovation.

Creating a strategic advantage for the Swiss economy

The internationalization in key emerging markets of Swiss SMEs and their innovation at home will maintain their margins and, ultimately, uphold Switzerland's living standard and quality of life. Swiss quality in every aspect may then continue to generate the efficiency and interest we have witnessed in the past decades.

China is certainly the most promising of the emerging markets but, as well, one of the most difficult to deal with, for large and smaller companies alike. The know-how necessary to develop the right concepts and be operationally efficient in China, the experience of the market and of the business culture remain the privileges of the few experts who accumulated the necessary experience in the 25 years since China's opening.

By maintaining and developing their networks, by conducting practical research and sharing experience and developing support instruments for Swiss SMEs, Swiss institutions in both China and Switzerland provide resources, China know-how, guidelines for efficient operations and access to the best available specialists on China business.In so doing, the organizations that provide China support strive to offer Swiss enterprises the key elements they need to acquire the means for success in China.

Text: © Nicolas Musy March 2005
Vice president SwissCham Shanghai

*1 Factory of the world - Feb 2004 - China Economic Review

*2 How cheap Chinese goods are hammering the world - Oct 11 2002 – Far East Economic Review

*3 CHINA: Wirtschaftsbericht Dezember 2004 – Dec 22 2004 – Swiss Embassy in Beijing

*4 Student surplus causes acceptance policy shift – Feb 2 2004 – China Daily

*5 China's middle class – The Economist – Jan 19 2002

*6 CHINA: Wirtschaftsbericht Dezember 2004 – Dec 22 2004 – Swiss Embassy in Beijing

*7 For the Chinese masses, an increasingly short fuse – December 31 2004 – the International Herald Tribune

*8 Swiss China Survey 2004 – January 2005

*9 Prof. Wang Jianmao of China Europe International Business School

*10 Research and Environment News from China – December 6 2004 – Swiss Embassy in Beijing

*11 Swiss China Survey 2004 – January 2005

Don’t Turn Your Partner into a Future Competitor

小心！切勿将今日的合作伙伴变成明日的竞争对手

Strategies for gaining low-cost production advantages and market access in China

以低成本生产的优势进入中国市场的相关策略

International companies discovered China as a sourcing paradise some years ago, for buying and / or producing consumer durable goods. Since 2000, large multinationals such as Walmart (which sourced goods worth USD 18 billion from over 5,000 Chinese suppliers since 2000; more than 70 per cent of products sold by Wal-Mart are made in China) and Metro have shifted their China sourcing offices from Hong Kong to Mainland China. The aim of this strategy is to gain better control over their suppliers, and smaller companies are now following suit. When sourcing from China, though, companies need to deal carefully with their manufacturing partner, who may cut off access to the Chinese markets.

早些年前，国际公司意识到中国市场是一个国际采购的天堂，他们可以在中国生产或是采购耐用消费品。自2000年，许多国际性的大公司，诸如沃尔玛，已向中国的5000家供应商采购了价值180亿美元的商品，现在70%在沃尔玛销售的商品来自于中国；麦德龙为了更好的管理其供应商，已把其在中国的采购中心从香港迁移到了上海。其他较小的公司也纷纷仿效这样的模式。但是当国外公司在中国进行采购时，他们必须提防他们的中国的合作伙伴，因为这些公司可能会在一定程度上阻止国外公司进入中国市场。

Whereas it is almost common sense today that consumer goods (electronics goods of all kinds, shoes, textiles, furniture, etc.) bought worldwide are mostly "made in China", the even bigger profit potential for companies lies in the production and/or purchase of industrial goods from China. As such, Chinese manufacturers are serving as cost-effective partners who enhance multinational companies' return-on-capital. However, only around half of China's exports are facilitated with foreign invested companies. The remainder stem from Chinese factories, either delivering through their own overseas distribution channels, or, much more likely, being involved as an OEM (original equipment manufacturer), ODM (original design manufacturer), or contract manufacturer, manufacturing under the brand of a foreign customer.

After consumer goods: Industrial goods manufactured in China

The immense cost-saving potential drives the majority of decisions to source from China. Depending on the product or component being sourced from China, cost reductions of 20% to 40% can be achieved, even after allowing for add-on costs, such as increased quality control, increased safety stock due to longer transportation time, and logistics costs. Chinese manufacturers in industries such as mold and die, tooling, electrical equipment, and automotive components are becoming efficient and technologically-sophisticated players. For this reason, whether or not a Western company should scrap any plans of setting up a WFOE (wholly foreign-owned enterprise) subsidiary and instead deploy a cost-efficient Chinese manufacturer as a key supplier to the Western company's global operations needs to be considered.

In the PVC injection-molding business, this approach has been taken by one of the leading building material producers by shutting down their Canadian plant and sourcing from a Chinese manufacturer in Fujian Province. This has to be seen in the context of the huge appetite of Chinese injection-molders for Western technology, which fed machine imports earlier this decade. As such, Chinese PE and PVC parts-producers provide advanced technology and allow cost-reductions of up to 40%.

The French automobile component-producer Valeo expects the sourcing value of its Shanghai Purchasing Office to increase from its current Euro 300 million to Euro 1 billion within three years. Valeo's final objective is to source 70% of its purchases in cost-competitive countries by 2010. China is about to develop into THE global sourcing hub for automotive parts.

Realizing China as the 'factory of the world'

Components, which require an assembly of two or more parts, are offered by Chinese manufacturers cheaply but at high quality due to manual execution by factory labor which is 20 to 30 times cheaper than a Western equivalent. Furthermore, such Chinese manufacturers can keep their capital investments low because labor replaces expensive machinery. Moreover, Chinese manufacturers generate cost advantages against WFOEs through sourcing raw materials, such as fabrics and plastics, from the domestic market.

However, pure cost advantages are not the only reason that Western companies deal with Chinese manufacturers. Access to local talent and especially access to the domestic market are playing an increasingly important role in sourcing decisions. Within the electronics industry, around one-third of foreign companies active in China use a Chinese manufacturing partner to source from China, whereas a similar number operate with wholly foreign-owned subsidiaries. Only a minority are investing in a joint venture with a Chinese partner. In fact, sourcing from a Chinese company offers the best opportunity to ensure reliable and immediate supplies without pouring major funds into the Chinese operations.

Furniture OEMs: No way out?

Finished-goods industries, such as furniture, are around five years ahead of the current wave of component-sourcing. In the 1990s, China became the main center for sourcing wooden furniture. The trend of Chinese furniture manufacturers supplying export markets had its origins in the initial exploitation of China as a low-cost export base by Taiwanese and Hong Kong furniture manufacturers. These days, around 30,000 manufacturers produce furniture in China, and roughly one-third of the output value are exports, mostly to the USA. The majority of these Chinese furniture manufacturers started off as OEMs for overseas brands. Overseas buyers provided the blueprints, after which the Chinese manufacturers produced the furniture under their customer's brand name. The profit margins of these export sales were often lower than those for domestic sales, but more consistent in volume.

Now, due to overwhelming competition and threatening penalty tariffs and anti-dumping duties, most Chinese OEMs are re-adjusting their strategies. Larger ones are managing to successfully transform themselves into their own furniture brand, but the majority are struggling with their given dilemma: Chinese manufacturers lack design capabilities (which was one reason they were price-competitive) and cannot neglect working steadily in order to maintain their factories, which consist of several hundred workers. In addition, overseas buyers will not accept any increases in cost for improved quality or design. Chinese manufacturers who escaped the "OEM-trap" are targeting the Chinese market with their own furniture brands. The prices of these Chinese brands are somewhat lower than products of comparable quality in the USA, but create a better profit margin for the producers than taking on OEM orders.

众所周知，目前世界市场上销售的消费品，诸如，各式各样的电子产品，鞋类，纺织品，家具等都打上了“中国制造”的标志，但是在中国生产或是从中国购买工业品能得到更为丰厚的利润。因此，国际公司为了提高投资回收率而把中国的低成本制造商转化为合作伙伴。但是外商投资企业只参与了一半的中国出口业务，其余的则是一些国内的企业或是通过他们在海外的分销网络直接销售，更多的则是通过OEM,ODM，或是合约形式，为国外客户贴牌生产。

继消费品之后，工业产品在中国的制造

大量节约成本的潜在商机促使很多企业采用从中国采购的策略。根据所采购的产品或者部件的不同，即使一些附加成本有所增加，（比如为了保证更为严格的长途运输质量和仓储安全而增加的费用）还是有20–40%的成本可以被省下来。中国的一些制造行业，如模具，工具，电气设备，汽车零部件行业已变得更加有效，在技术上更为成熟。因此对于国外的投资者就必须考虑这样一个问题，究竟是应该在中国建立一个独资企业，还是寻找一个具有低成本优势的本地企业作为其在全球范围经营活动的主要供应商。

在PVC模具注塑行业中，有一家知名的建筑材料制造商就采取了这种方式，这家企业关闭了在加拿大的工厂，然后从福建的一家中国工厂进行采购。中国的许多注塑模具制造商早些年为了追求获得西方的生产技术而进口了许多先进的设备，因此中国的PE和PVC部件的生产商可以提供相对比较先进的技术但同时又能节约高达40%的成本。

法国汽车零部件厂商Valeo预计其上海采购中心采购产品的价值在三年内将从3亿欧元增加至10亿欧元。Valeo的最终目标是到2010年70%采购的商品将来源于具有成本优势的国家。中国将成为全球汽车零部件采购的中心。

中国“世界工厂”

由于中国的劳动力比西方国家便宜20–30倍，而中国企业又属于劳动力密集型企业，因此中国企业生产的由至少两个以上部件组合而成的零部件就可以做到真正的质高价低。其次，这些企业廉价的劳动力可以取代昂贵的机器，所需资金投入也少。再次，中国企业在本地采购纤维，塑料等原材料也使得他们在与外商独资企业的竞争中占有很大的成本优势。

但是纯粹的成本优势并不是西方企业愿意与中国制造商签订合同的唯一原因。能够利用本地的人才资源，特别是打入中国市场已经成为在做采购决定中越来越重要的因素。就电子产业而言，将近在中国1/3的国外企业通过中国的合作伙伴采购产品，　但同时也有相当数量的国外企业在中国建立独资子公司进行运营。只有很少的一部选择与国内的合作伙伴建立合资企业。总之，从中国企业直接采购是确保可靠、及时供应产品的最好的方式，也无需为中国经营活动投入大量资金。

家具行业OEM，此路不通？

像家具这种成品的采购比目前零部件采购的浪潮提前了五年。二十世纪九十年代，中国成为木制家具的采购中心。中国家具厂商出口国外市场的趋势源于早期香港和台湾家具制造企业发现并把中国大陆作为低成本出口的基地。目前在中国有30，000家家具制造厂商，　大约1/3的产值是出口所得，出口产品主要销往美国。大多数的中国企业最早从为国外企业做OEM生产开始。国外买家提供家具设计蓝图，然后中国厂商做生产并贴国外客户的品牌。以做OEM所获得的利润通常要比在国内市场上直接销售的利润要低，但是其量大而且较稳定。

由于市场竞争过于激烈，以及惩罚性关税和反倾销税的存在，使得许多中国的OEM厂商现在开始重新定位竞争策略。规模较大的公司正成功的转型创立自己的品牌，但是大多数的公司还在困境中苦苦挣扎。一方面，中国企业缺乏设计能力，这也是他们采取价格竞争优势的首要原因，但又不能忽视稳定的订单能维持厂内几千名工人的生活的事实。另一方面，国外的买家又不能接受为提高质量或设计而增加成本。从OEM陷阱中逃离出来的中国企业开始选择用自己的品牌瞄准中国市场。这些中国品牌家具的价格要比那些在美国市场上质量相当的家具要低一些，　但是却能比做OEM订单获得更为丰厚的利润。

Chinese OEMs' hidden masterplan

The problem of this development for overseas brands is that former Chinese OEM partners are developing the Chinese market with their own brands, offering good quality at lower prices than foreign brands. As such, foreign brands keeping their Chinese manufacturers in an OEM-trap provoke a loss of access to the Chinese markets and strengthen their future competitors. Ironically, this creates a dilemma for foreign companies. They either face the prospect of losing out on higher returns on capital by avoiding sourcing from China or losing the opportunity to become a potential player in China's fast-growing domestic markets.

Not only in the furniture industry have Chinese manufacturers had a hidden masterplan of learning via OEM orders and building up their own brands in the domestic market, shutting the door to the Chinese market for their former overseas customers. Component manufacturers in the electronics and automotive industry are following a similar scheme. Sometimes, the Chinese manufacturing partner is just using the guileless Western partner as a tool for its own enrichment. An example is a joint venture that was set up between a foreign watch company and a Chinese manufacturer in Guangdong, in which the foreign company planned to source its glass parts at lower cost. However, a lack of management control allowed the Chinese general manager to establish a stealthy intermediary entity between the product flow of the joint venture (the producer) and the customer (the Chinese parent company). The general manager was able to profit by channeling the goods through an unauthorized customer-in-disguise entity.

So, what can a foreign company do to remain profitable (because of the Chinese low-cost advantage), while preventing its Chinese manufacturing partner from scooping up future market potential?

- **Option 1: Establish your sourcing base**

The simplest, but in most cases necessary, step is to contribute internal budgets to the sourcing activities by setting up a representation office in China in which to handle the Chinese manufacturing partner. The more complex the sourced component, and the higher the quality requirements, the greater the necessity of conducting quality control, factory audits, and technical support by oneself, instead of having a trading company or an agent acting as a go-between. From a strategic point of view, factory audits and company checks will reveal the Chinese manufacturer's intentions, future plans and the managers' backgrounds, as well as the company structure.

- **Option 2: Acquire your supplier for competitive advantage**

Backward integration is an option to consider, especially if the foreign company intends to utilise China long-term as a global manufacturing base. As such, the Chinese manufacturing partner is normally bound to a contract, which includes a buy-out scheme according to the manufacturer's output volume, and enables the foreign company to gradually take over its Chinese partner. If the Chinese manufacturer has already developed its own brand for the Chinese market, and the foreign company is seeking market access to the domestic market, then a takeover of the Chinese partner may be considered, especially if the Chinese partner has already established distribution channels.

- **Option 3: Buy yourself a second brand for gaining market share**

Position yourself with two brands, your own premium brand, and a second Chinese brand, to gain both profit and market share when developing the Chinese market. Typically, a foreign company introducing its high-quality products into China often finds a pyramid-shaped market, in which the medium and high-end market potential is the highest but also the most difficult to tap. In this situation, most foreign producers are reasonably reluctant to avoid a modification of their product or component, since competing on price on Chinese turf is a lost battle before it even starts.

For example, a foreign electric components company was considering a major move in Chinese markets by allying with a lower-quality Chinese brand. By doing so, the foreign company could produce in volume and simultaneously avoid a price deterioration of its international brand.

中国OEM企业，酝酿远大计划

对于国外品牌来说，这种发展趋势所带来的问题在于以前做OEM的中国伙伴正在用自己的品牌开发国内市场。相对于国外品牌而言，他们可以提供质高价廉的商品。因此，国外品牌将其中国供应商局限在OEM的圈子里将会阻止自身进入中国市场的步伐同时又壮大了其竞争对手的实力。具有讽刺意味的是这种情况使国外企业陷入一种进退两难的境地，如果停止从中国采购，将有可能失去较高的投资回收，其在快速发展的国内市场的发展潜力也可能遭到威胁。

除了家具行业外，更多中国企业正开始酝酿未来计划，从做OEM订单中学习经验并在国内建立自己的品牌，从而把过去的国外客户拒之于中国市场的大门之外。电子和汽车零部件行业也有类似的发展趋势。有时中国企业只是利用无经验的国外伙伴作为发财致富的工具。在此举一个例子，在广东有一个中外合资企业，外方向中国采购低成本的玻璃部件，但是由于缺乏管理上的控制使得中方的总经理在合资企业（制造商）和客户（中方母公司）之间建立起了一个中间企业。因此，这位总经理可以通过把产品销往这个伪造的客户公司再转手而获得利润。

那么，国外企业该采取什么措施能在利用中国低成本优势的同时防止中方合作者占取未来潜在市场呢？

方法一：建立自己的采购基地。

最简单但必须的一步是在内部调拨资金为采购活动在中国建立起一个代表处，负责联络中国供应商。越是复杂的零部件，对技术的要求也就越高，办事处本身对质量控制，工厂审核和技术支持的必要性也就越大，而不能依靠一个贸易公司，代理商等中间机构。从战略的角度来看，工厂审核可以暴露出供应商的意图、未来计划、总经理的背景和公司的组织结构。

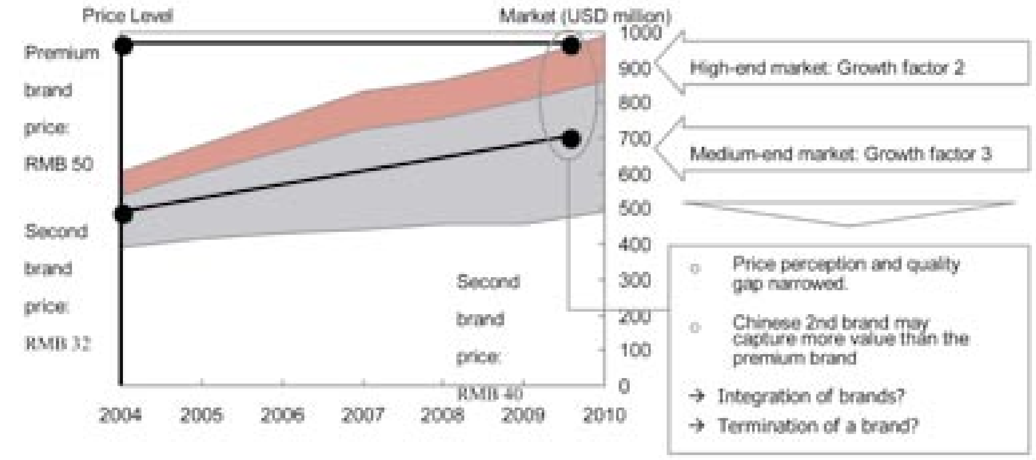
方法二：出于竞争优势考虑收购供应商。

尤其是当国外企业意图在中国建立全球生产基地，与其供应商的结合将是一个可供考虑的选择。因此，可以用合同来约束中方供应商，包括根据其产量买断该供应商的计划，这样可以使国外企业逐渐取代其中方合作者。如果中方企业早已在中国市场上发展了自己的品牌，而外方正寻求进入中国市场的途径，尤其是当中方已经建立起分销渠道，那么可以考虑收购该企业。

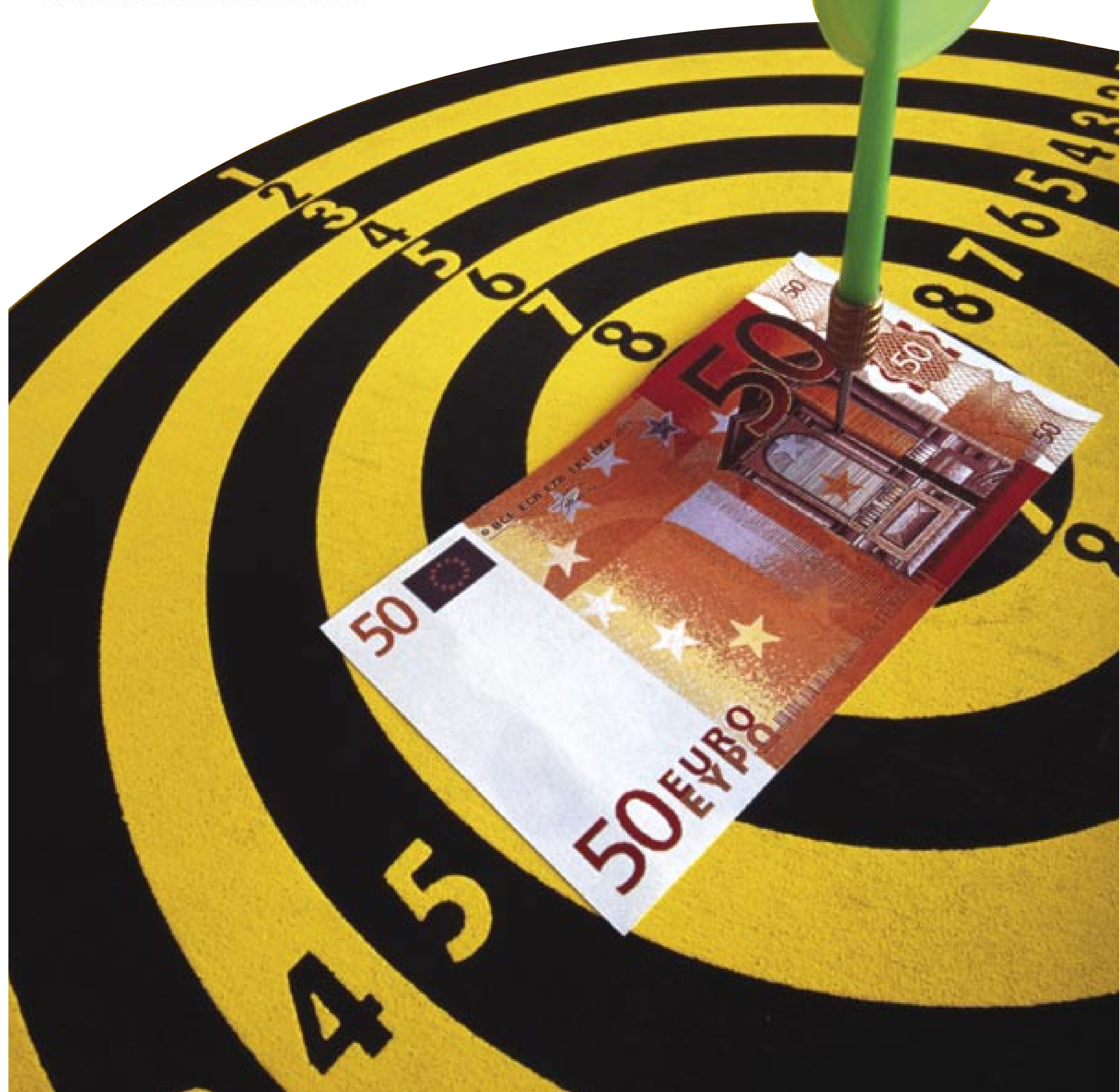
方法三：购买第二个品牌以赢取市场份额。

将自己定位在拥有两个品牌，一个自己原有的高端品牌，一个中国品牌，以期在开拓中国市场时同时获得利润和市场份额。尤其是当一个国外企业将其高质量产品打入中国市场时，经常会发现市场呈金字塔形，中高层的市场潜力最大但是也是最难打入的。在这种情况下，许多国外企业只得对自己的整个产品或是部件做修改来适应市场要求，因为在中国市场打价格战，往往在还没开始之前就注定是失败的。

一家国外的电子配件厂商正打算通过推出一个相对质量较低的中国品牌来大举打入中国市场。通过这种方式，国外企业可以在大批量生产的同时避免由于价格因素而降低其国际品牌的声誉。



Visualization of 2-Brand Strategy: The faster growth for the 2nd brand market potential can endanger the prem positioning of a foreign player. Source: Fiducia Analysis.



Facts and Figures: 相关信息及数据

China's exports represent around one-fifth of all imports from low-cost countries to the USA and Germany. Switzerland bought imported goods from China to the value of around USD 2.4 billion in 2003, which represented around 20% of Swiss imports from Asia, but only 2% of its total imports from all over the world. However, Chinese imports account for one-third of all imports from countries classified as "Transformational economies," and are already in the same dimension as imports from Japan.

Most significantly, Switzerland is sourcing increasingly greater numbers of machinery and electronics from China. Whereas around half of Chinese imports in the early nineties were clothing and textile goods, with machinery and electronics amounting to less than 10%, Switzerland bought machinery and electronics for around USD 500 million (roughly one-quarter of Chinese imports) in 2003.

China exported goods valued at USD 438 billion in 2003, but approximately half of that was actually exported by foreign-invested companies. Around 17% of China's exports were textiles, and around 40% were machinery, electronics, recorders, and accessories.

Industrial goods with a cost-advantage sourced from China I

- **Machine tools**
- **Tools and molds**
- **Apparel**
- **Computer parts**
- **Home furnishings**
- **Castings**
  (steel, precision casting, grey iron, aluminum, etc.)
- **Molded and extruded parts**
  (plastics and rubber- including precision parts)
- **Steel (coils, profiles, tubes), stamped and bent parts**
- **Precision parts of any material**
- **PCB and PCB-assemblies**
- **Electronics**

Industrial goods with a cost-advantage sourced from China I

- **Ceramics**
- **Architectural and structural metals**
- **Aerospace products and parts**
- **Vehicle steering and suspension components**
- **Motor vehicle transmission and power train parts**
- **Motor vehicle brake systems**
- **Motor vehicle seating and interior trim**
- **Navigational, measuring, medical,**
  and control instruments
- **Pumps, compressors,**
  and material handling equipment
- **Semiconductors**
- **Electrical components**

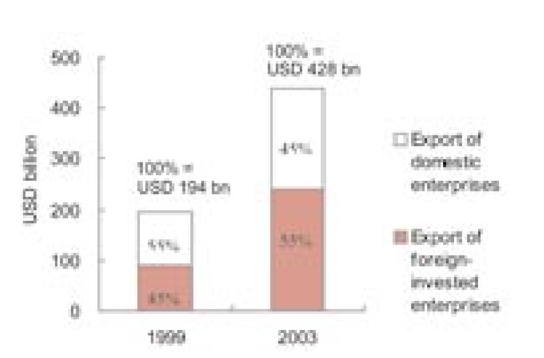
在美国和德国向低生产成本国家进口的产品中有五分之一来自中国。2003 年其间， 瑞士从中国的进口额为24亿美元，约占其向整个亚洲进口额的20%，但只占其向全球进口额的2%。值得注意的是中国的出口量已占所有"转型经济"国家的出口量的三分之一， 并且与日本的出口量持平。

更值得一提的是瑞士不断地增加向中国进口机械和电子产品，2003年此类商品的进口额为5亿美元， 约占中国对该国出口额的五分之一。这与90年代的情况形成鲜明的对比，当时瑞士向中国进口的商品以纺织品为主（50%），而电子和机械产品却微不足道（少于10%）。

2003年中国的总出口额为4,380亿美元，其中一半商品是由外商投资企业所生产。出口产品中有17%的是纺织品，另外其他商品如机械，电子产品，录音机及其配件占40%。

以下是一些显示成本优势的工业产品：

机床
工具和模具
服装
电脑配件
家具
铸造件（钢，精铸件，灰铁，铝等）
模具件（塑料，橡胶，包括精密件）
钢铁产品（卷板，钢管，冲压和折弯件）
精密件（任何材料）
印刷电路板及配件
电子产品
陶瓷品
建筑钢材和结构钢
航空产品和零部件
汽车方向盘和悬架产品
汽车传动和变速零部件
汽车刹车系统
汽车座椅和内部装饰
导航，测量，医疗和控制器材
泵，空气压缩机和原材料处理机
半导体
电子元件



Comparison of Exports from China 1999 and 2003, in USD billion: Foreign-invested companies are exporting more than in 1999. Source: China Statistical Yearbook 2004 and 2001, Fiducia Analysis.

However, the main problem with this solution is the integration of the two brands in the near future. In the example shown in the diagram below, market dynamics mirror a tripling of growth of the medium-end market, whereas the premium market growth only doubles within the same period of time, but with new competitors entering the premium market every year. Therefore, it is possible that the Chinese brand may become more profitable, due to its market share potential, than the premium brand, which will be under immense pressure to lower its price. Furthermore, the second brand is likely to gain in quality over time and soon be directly competing with the premium brand. Therefore, the company will be confronted with a conflict within a few years: Asserting its own premium brand and abandoning the Chinese cash cow brand, or signaling unclear positioning, with two brands that are slowly approximating each other in terms of price and quality.

- **Option 4: Diversify your supplier risk**

Develop one or more sourcing alternatives: Identify further manufacturing partners in order to keep your prices low and prevent your manufacturing partners from raising cash for R&D or machinery investments. Furthermore, having several manufacturing partners enables a Western company to keep exposure of its know-how to Chinese manufacturers low. A company producing cranes, for example, distributes the production of component parts to four different manufacturers, with the final assembly done via a WFOE in Shanghai. This strategy avoids allowing the Chinese manufacturers to gain an overall picture of the finished components, and allows the foreign company to make cost-competitive exports to the USA.

- **Option 5: Take the plunge….**

Establish your presence with a WFOE and build your own distribution channels. This is currently the most favored option for foreign companies, since certain Chinese legal requirements for forming partnerships for production (soon for distribution as well) have become void in most industries. Typically, this enables a company to avoid the risk of unauthorized access to know-how. However, this option should take into account eventual access to the Chinese market.

In the case of a joint venture structure, be sure that the joint venture manufacturing entity is kept as a pure production entity. Set up a separate entity for marketing, sales, and R&D competence.

The fast-changing dynamics of Chinese markets and their environment require foreign buyers/producers to constantly think about the next strategic option and about how to turn potential threats into opportunities. Since China is evolving in various industries, not only as a low-cost manufacturing source but also as a market, particularly for industrial goods, foreign companies need to find a way to tame their low-cost OEMs before they close the gates on a market which is currently extremely promising.

Fiducia Management Consultants

Fiducia Management Consultants
Beijing • Hong Kong • Shanghai • Shenzhen

Franc Kaiser
Senior Consultant
Board Member, SwissCham Shanghai
fkaiser@fiducia-china.com

但是，这种方法的最大问题是两种品牌在将来的融合。以下图表举例反映出，在相同的时间里在市场动力的推动下，中间市场增长了三倍，而高端市场只增加了一倍，同时又有新的竞争者挤入该市场。由于主要品牌承受着巨大的价格压力，中国品牌在该市场中占据高份额的潜力远大于其主要品牌，因此它可能在市场中赚取更大的利润。其次，第二品牌随着时间的推移在质量上逐渐改善并达到了可以与主要品牌媲美的程度，因此，该企业不久就会陷入两难的困境：大力推广自己的主要品牌而放弃能带来巨大利润的中国品牌或是采取一种两种品牌模糊不清的产品定位，而这两个品牌在价格和质量上也会逐渐的靠近。

方法四：分散供应商风险。

开拓更多的采购选择性：寻找更多的供应商伙伴以保持低价和防止供应商累积资金并投入到研发和设备投入中。此外，同时采用多个供应商可以降低国外企业向中国市场泄漏其关键技术的可能性。举例来说，一家生产起重机的厂商把生产零部件的业务分包给四个供应商，然后在上海的独资企业做最后的装配。这种策略阻止了中国厂商了解整个成品部件的情况，并使该国外公司在向美国出口时获得成本上的竞争优势。

方法五: 进军中国市场

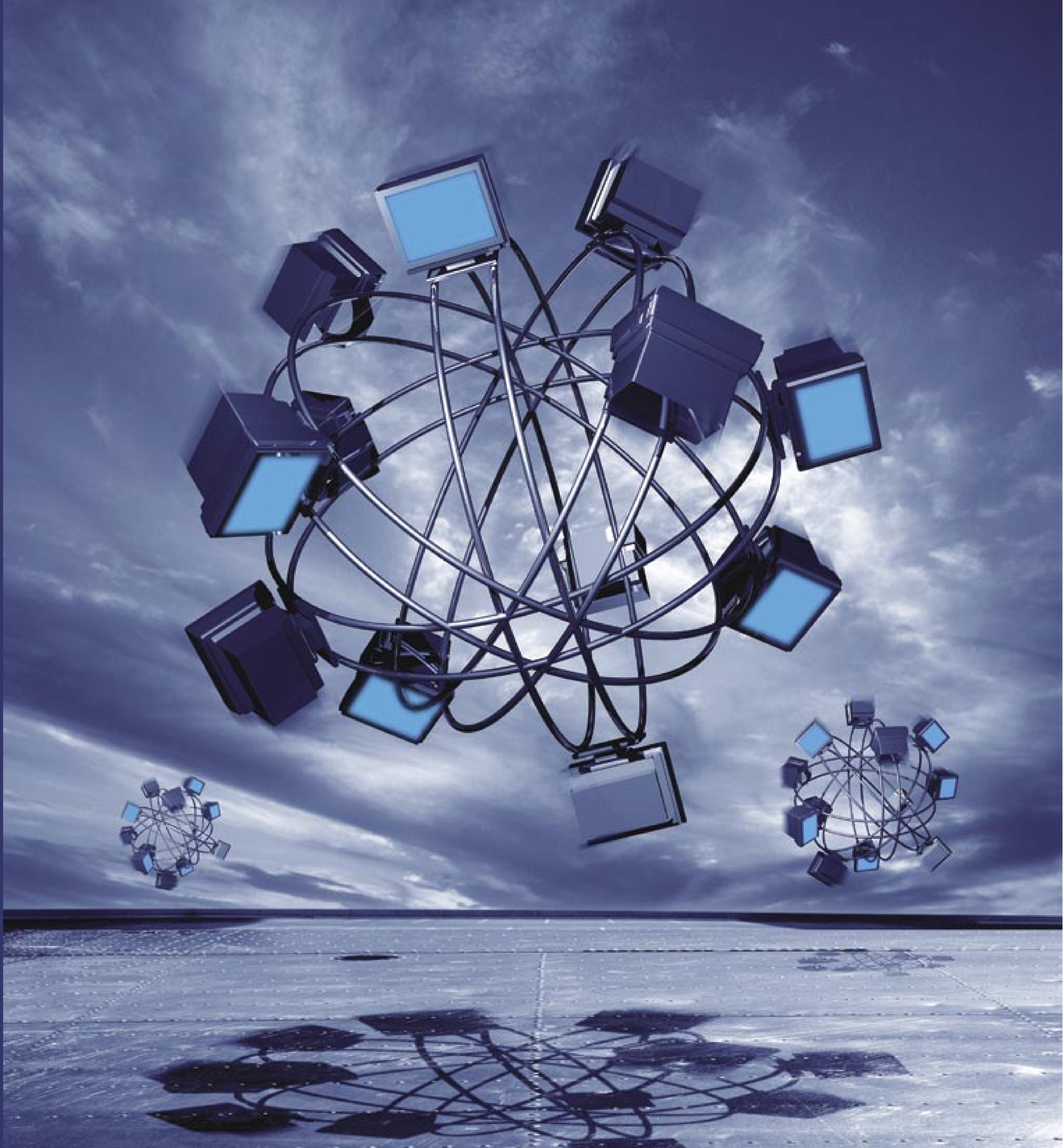
与其通过合作来进入中国市场，不如主动发动进攻。就打入中国市场而言，目前最受青睐的策略是成立独资企业加上全权控制的市场分销渠道。其原因之一是：在许多行业，国外企业要想在中国参与生产或销售活动必须通过与中方合作的形式的法律相关规定已经被废止。其原因之二是： 这种方式避免了关键技术流失。总而言之， 这应是进军中国市场的首选之道。

除上述方式，中外合资也是可选之道。不过为求安全保密，外方应独揽市场销售和产品开发的权利，将合作仅限于产品生产。

中国市场与其经济环境可谓生气勃勃并且变化多端， 所以外来的买家和生产厂家要随机应变才能化险为夷。 因为中国工业是多元化发展的，所以它不止是个低成本采购中心，也是一个市场，尤其是对工业商品而言。为此外资企业必须寻找方式来控制廉价OEM的生产和销售，以免让其转化为通向中国市场的拦路虎。

CHINA's Information Technology Industry accelerates its Development: Facts & Figures of the last 10 Years

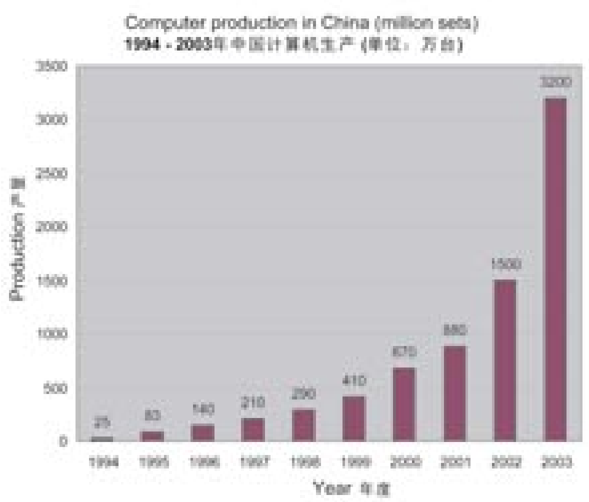
加速前进中的中国信息技术产业：过去十年的发展历程



Lenovo's recent purchase of IBM is just one part of a greater movement. Now that the deal has been approved by the Committee on Foreign Investment in the United States (CFIUS), China's IT industry is definitely progressing. Dr. Jie Yan, Assistant Professor of Technology Management at Grenoble Ecole de Management (France), gives an overview of causes and consequences.

中国信息技术产业的崛起已有时日，联想对IBM个人电脑部门的收购只是中国信息技术产业产期发展过程中一个引人注目的步骤。中国信息技术企业进军国际市场是产业发展的必然结果，也是过去20年取得成绩的一个印证。法国格勒诺贝尔商学院助理教授闫杰博士对这一收购的内容和背景进行分析。

The statistics used by the author were gathered mainly from the websites of the Ministry of Information Industry of China文中数据主要来源于中国信息产业部历年发布的产业发展统计报告 http://www.mii.gov.cn



Production and exports of major consumer electronic products in 2003
2003年主要消费电子产品的生产和出口

Item 产品	Production (sets) 产量（台）	Growth 增长(%)	Export (US$) 出口 (亿美元)	Growth 增长 (%)
Mobile handset	18600	54.5	7.4 billion 74亿美元	39.4
Color TV	6500	30.3	2.6 billion 26亿美元	16.6
Display	7300	56.2	9.6 billion 96亿美元	62.4
Color kinescope	9100	16.1	0.8 billion 8亿美元	17.7

On December 8, 2004 surprising news came from Beijing: Lenovo Group, China's largest computer maker, had purchased IBM's personal computer business. The US$1.25 billion transaction covers IBM's entire global desktop and laptop concerns, inclusive of R&D, manufacturing, purchasing and sales. This includes the Think series brand name for five years. For this deal Lenovo paid US$650 million in cash and US$600 million in stock.

This makes Lenovo the third largest PC maker in the world. Sales are expected to reach 11.9 million computers internationally, with an annual revenue of US$12 billion. Lenovo will move its headquarters from Beijing to New York and hire about 2,300 former IBM employees in the US, mostly product designers, marketers and sales specialists. Under the deal, IBM will hold an 18.9 percent stake in Lenovo. This will enable IBM to continue its strategic transformation from a hardware manufacturer to a service provider, focusing on the more profitable high-end computer and software solution business. It also gives IBM a shortcut to the Chinese IT (Information Technology) service market by building up a strategic alliance with Lenovo.

This news seemed to shock many people who are not aware of the achievements of Chinese IT firms over the past decades. However, in the IT world, people do understand that the rise of Chinese firms has been on the way for a long time. Thus, Lenovo's acquisition can be viewed as just one of many high-impact actions by which Chinese IT players march into the global market. Indeed, Lenovo's acquisition may even be a trigger, encouraging other Chinese IT firms to speed up their globalization schemes.

Since 1990, mainland China has seen a rapid and continuous development of its IT industries. IT has become one of China's core industries with an average growth rate of over 32% throughout the last decade. In 2002, the added value of the information technology industry accounted for 5.7% of GDP, up from just 2.3% in 1997.

Computer manufacture has been one of the fastest growing sectors in China with an average annual growth rate of over 50% in the 1990's. This year, Computers with a value of US$2.2 billion were exported to foreign markets. This marked an increase of 56% over the previous year. It is believed that Lenovo's purchase of IBM's PC business will further enhance Chinese-made computers' brand recognition in the global market. This in turn will lead to an escalation in PC exports in the next few years, bringing stronger competition to leading players such as Dell and HP, mainly US companies.

2004年12月8日，北京传来消息：联想集团收购了IBM个人电脑全部业务，包括IBM全球各地的所有台式机和笔记本电脑研发、生产、采购和销售部门，以及IBM Thinkpad 系列品牌5年的使用权。交易涉及12亿5千万美元，联想支付6亿5千万美元现金，同时转让6亿美元联想股票给IBM。据信联想将在随后几年中每年生产1190万台计算机，年销售收入达到120亿美元，成为继戴尔和惠普之后的全球第三大个人电脑制造商。根据合约，联想集团总部将由北京转移到纽约，并在美国雇佣2300名前IBM职员，他们中大多数是产品设计、市场策划和销售服务的专业人员。这一收购是联想国际化发展战略的重要环节，为联想品牌进入国际市场铺平了道路。IBM也将从中获得巨大收益。出售个人电脑部门使其能集中力量发展高利润的高端电脑和软件服务业务，实现从硬件制造商向信息技术服务商的战略转换。除了现金流入，IBM持有联想18.0%的股票，这一战略联盟关系为其进入中国信息服务市场提供了捷径。

这一消息对于很多不了解中国信息技术产业发展状况的人来说，的确非常震惊。事实上，中国信息技术产业的崛起已有时日，联想的战略收购只是中国信息技术企业进入国际市场过程中引人注目的一个事件。可以预见，联想的成功必将引发更多中国企业加速实施其国际化战略。

自从1990年以来，信息技术成为中国的支柱产业之一，一直保持着年平均增长率超过32%高速发展。2002年信息技术产业产值占国内生产总值的5.7%，远远高于5年前的2.3%。过去十年里，电子信息产品出口年增长幅度始终高于30%，占中国出口贸易增长的一半以上。

计算机是中国发展最快的产业之一，过去十年里平均年增长幅度超过50%。2003年中国生产了3200万台电脑，相对2002年增长113%。国内市场销售了3100万台电脑，其中四分之一是笔记本电脑。价值22亿美元的电脑出口到了国际市场，

China's software sector has maintained a high growth rate of over 30% since 1998. In 2003, revenues from software and system integration reached a total of US$19.2 billion, an increase of 45% over the previous year. Software exports reached US$2.0 billion, an increase of 33%. There are over 8,000 software companies across the country. The Chinese government implemented favorable policies to promote the development of the software sector and invested in 11 state-level software industry bases in major cities in the late 1990's. Software start-ups are exempted from tax during the first two years and pay only half required taxes for the following three years. The Chinese government has carried out a nationwide campaign and has taken fierce legal actions to fight against piracy and protect the intellectual property of software products. Pirates can be sentenced to prison for up to 7 years.

The consumer electronic product sector has also been growing rapidly. In 2003, China produced 65 million TV sets, and exported US$2.6 billion worth of them. Exports have risen six times from 1997 levels.

In 1998, almost all mobile handsets sold in China were foreign brands such as Motorola, Nokia and Ericsson. Just 5 years later, Chinese companies manufactured 186 million mobile handsets. More than half of these had local brand names and represented more than 60% of the domestic market. By 2003, communication products and equipment labeled 'Made in China' were exported to more than 40 countries and regions around the world.

比前一年增长56%。联想对IBM个人电脑的收购必将提升中国品牌在国际市场的认知度，进一步提升国产电脑的竞争力。

自从1998年以来，中国软件产业持续保持30%以上的高速增长。2003年软件产品和系统集成的销售额达到192亿美元，比前一年增长45%。软件出口20亿美元，增长33%。全国共有8千多家软件企业。中国政府颁布了激励软件产业发展的优惠政策，并投资建立了11个国家级的软件产业发展基地。新成立的软件企业享受前两年免税，之后三年缴纳半税的优惠待遇。中国政府采取了很多措施更加严格地执行知识产权法，保护软件产权，打击盗版，盗版犯罪者会被判处最长7年的监禁。

消费电子产品产业同样发展迅速。2003年中国制造了6500万台电视机，出口26亿美元。出口额是1997年的6倍。在1998年的时候，中国人使用的手机基本上全部是国外产品。5年之后的2003年，中国企业制造了18600万台手机，其中一半以上使用的是国内企业的自有品牌，占有60%的国内市场。标有'中国制造'的通讯产品和设备出口到了全球40多个国家和地区。

China is also attempting to change its position from a low-end product manufacturer to a high, value-added product provider. Chinese IT firms have been spending significantly more money on R&D activities. Since 1998, many leading Chinese IT firms have set up overseas R&D centers in California's Silicon Valley, Japan and Europe. Some firms purchased foreign companies or built up strategic alliances with foreign partners to expand their technological capability. These efforts have resulted in remarkable achievements.

One success story is the rapid development of Chinese IC (integrated circuit) design and production. There are about 200 semiconductor companies in China specializing in IC design and manufacturing. Some of them are highly competitive, even close to cutting edge with the ability to design, develop and produce 0.18 micron chips on a large scale.

Chinese semiconductor companies produced 12.4 billion IC in 2003, up from 1.3 billion in 1997. IC exports reached US$6.0 billion, an increase of 166% over 2002. Most of China's IC design and manufacture companies are located in Beijing, Shanghai and Shenzhen. It is anticipated that China will become the world second largest IC producer and market, just after the US, by the year 2010. In some other technological areas such as computer network products, digital audio-video equipment and new types of information components, China is also gradually narrowing the gap between domestic capabilities and advanced international technologies.

Information and communication products with a value of US$169.3 billion were sold in China in 2002, accounting for 12.1% of the world IT market. China has thus become a key link in the world chain of electronic and information production. Many product lines, originally manufactured in Taiwan, Singapore and Malaysia, are now being produced in Eastern and Southern China. In cities such as Shanghai, Beijing, Suzhou, Shenzhen, Xiamen and Dong-guan, a large number of IT related companies have built up highly efficient industrial clusters and supplier networks. These regional IT complexes have a dynamic potential for sustainable innovation and development. It is expected that China will succeed Japan as the second IT product maker, just after the US, in the next few years.

The IT industry fuels the development of China's national economy. By 2003, over 36 million computers have Internet access in China, up from 6.5 million in 2000. With a new range of applications for automation technology, information and communication systems, the productivity of many traditional industrial sectors has increased significantly.

The rapid growth of China's IT market and industry also provides attractive opportunities to Western IT firms. China received over US$70 billion in foreign capital since the adoption of reforms two decades ago. More than 10,000 foreign invested enterprises were established in the Chinese IT industry, accounting for over 15% of all foreign invested companies in China. Most of the foreign investments came from the developed economies: the US, Japan, and Western Europe. Many of these ventures have been very active in terms of R&D and technological innovation, and have achieved marked business success.

中国企业也一直进行着从低端产品向高附加值产品制造商的转变。很多信息技术企业投入了大量资金进行产品研发。从1998年开始，一些企业陆续在美国硅谷、日本和欧洲建立研发中心，或者通过收购国外企业、建立战略联盟等方式提升自身技术能力。在一些领域，中国企业的研发能力已经有了显著提高。

中国迅速提升的集成电路设计和制造能力非常引人注目。中国大约有200家半导体企业从事集成电路芯片设计和制造。一些企业有很强的竞争能力，拥有大规模设计、开发、制造0.18微米集成电路芯片的技术能力，这一技术指标已经非常接近国际领先水平。2000年中国半导体企业生产了124亿片集成电路芯片，远远多于1997年的13亿片。出口达到60亿美元，比2002年增长166%。大部分集成电路生产企业位于北京、上海和深圳。据估计，到2010年中国将成为世界第二大集成电路芯片制造地和市场，仅次于美国。在其他的一些技术领域，比如电脑网络产品、数字音频视频设备和新信息产品元件，中国正迅速缩小与国际先进水平之间的差距。

2002年中国总共销售了价值1693亿美元的电子信息产品，占世界信息技术产品市场的12.1%。中国已经成为世界电子信息产品产业链的一个重要环节。过去几年里，很多位于台湾、新加坡和马来西亚的电子信息产品生产线已经转移到了中国东部和南部。很多信息技术企业聚集在上海、北京、苏州、深圳、厦门和东莞等城市和周边地区，形成了大规模的企业聚集群体和高效率的供应商网络。这些区域性的产业集群具有很强的持续创新和发展能力。据估计，中国在几年之内即将超过日本，成为世界第二大电子产品制造地。

信息技术产业为中国经济的升级和发展提供了动力。2000年中国有650万台电脑连接在互联网上，到2003年连接在互联网上的电脑达到3600万台。随着通讯技术、管理信息系统和自动化技术的广泛应用，很多传统工业部门的生产率得到了显著的提高。

中国信息技术产业和市场的迅速发展也为国外企业提供了机会。自从改革开放以来，中国信息技术产业总共得到了700亿美元的国外资本，建立了超过一万家外资企业。绝大多数国外投资来自于美国、日本和西欧国家。很多外资企业在产品研发和技术创新方面很活跃，并且取得了很好的商业效益。

Contact: Yie Yan

Assistant Professor

Department of Technology Management

Grenoble Ecole de Management

Email: Jie.yan@grenoble-em.com

Useful Contacts in Beijing
北京 重要联络机构

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Central Government Offices 中央政府办公室

China Insurance Regulatory Commission (CIRC)
中国保险监督管理委员会 + 86 10 6621 0188

General Administration of Customs
中国海关总署 + 86 10 6519 4114

General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ) 国家质量检验检疫总局 + 86 10 6419 1114

Ministry of Foreign Affairs (MOFA)
中国外交部 + 86 10 6596 1114 www.fmprc.gov.cn

Ministry of Commerce (MOFCOM)
中国商务部 + 86 10 6519 7325 www.mofcom.gov.cn

Ministry of Information Industry (MII)
中国信息产业部 + 86 10 6601 4249 www.mii.gov.cn

Ministry of Science and Technology (MOST)
中国科学技术部 + 86 10 6851 5544 www.most.gov.cn

National Bureau of Statistics
国家统计局 + 86 10 6857 3311 www.stats.gov.cn

National Development and Reform Commission (NDRC)
国家发展和改革委员会 + 86 10 6850 1240 www.sdpc.gov.cn

State Administration of Foreign Exchange (SAFE)
国家外汇管理局 + 86 10 6840 2255

State Administration for Industry and Commerce (SAIC)
国家工商行政管理局 + 86 10 6803 2233

State Administration for Taxation (SAT)
国家税务总局 + 86 10 6341 7114

State Asset Management Commission (SAMC)
国有资产监督管理委员会 + 86 10 6319 3569

State Intellectual Property Office (SIPO)
国家知识产权局 + 86 10 6209 3114

Chinese Government Websites 中国政府官方网站

Beijing Foreign Economic and Trade Commission
北京市外经委 www.tpbjc.gove.cn

Beijing International Investment Promotion Council
北京国际投资促进委员会 www.fdibeijing.org.cn

China Economic Information
中国经济新闻 www.cei.gov.cn

State Economic and Trade Commission, PRC
国家经济贸易委员会 www.setc.gov.cn

Swiss contacts

SwissCham Beijing 中国瑞士商会--北京

20/F Star City Tower C, 10 Jiuxiangqiao Road 100016 Beijing
北京市朝阳区酒仙桥路10号星城国际20层C座 100016 北京

Tel 电话: + 86 10 64322020

Fax 传真: + 86 10 64323030

Email 电子邮件: info@bei.swisscham.org

www.bei.swisscham.org

SwissCham Beijing Board Members 北京董事会成员

Cyrill Eltschinger, President
埃尔钦汗, 总裁
Tel 电话: + 86 10 6599 2288
Email 邮件: ce@ituc.com

Zhang Hu, Vice–President
张虎 ,副总裁
Tel 电话: + 86 10 8049 0472
Email 邮件: zhanghu@bjlem.com.cn

Dr. Manfred Streuber, Vice–President
史卓栢, 副总裁
Tel 电话: + 86 10 6561 3988 Ext. 111
Email 邮件: manfred.streuber@dksh.com

James Chen, Secretary General
陈志俊, 秘书长
Tel 电话: + 86 10 6788 6200 Ext. 103
Email 邮件: james.chen@sig.biz

Olivier Glauser, Director of the Board & Treasurer
高力伟,董事兼司库
Tel 电话: + 86 10 8529 6529 Ext. 261
Email 邮件: oglauser@qualcomm.com

Edgar Doerig, Honorary Board Member,
杜逸可, 荣誉董事
Tel 电话: + 86 10 6532 2736 38
Email 邮件: edgar.doerig@bei.rep.admin.ch

Swiss Embassy / Swiss Business Hub Beijing
瑞士大使馆
瑞士商务促进中心 北京

Sanlitun, Dongwujie 3 100600 Beijing
三里屯东五街3号
100600 北京
Tel 电话: + 86 10 6532 2736
（no visa questions will be answered 恕不回答签证问题）
Fax 传真: + 86 10 6532 4353
Email 邮件: Vertretung@bei.rep.admin.ch

Switzerland Tourism 瑞士旅游局

Tel/电话: + 86 10 6512–5427
Fax/传真: + 86 10 6512–0973
Website/网址: www.MySwitzerland.com

Swiss Society Beijing 北京瑞士协会

info@ssbj.org www.ssbj.org

Useful Contacts in Shanghai
上海 重要联络机构

SwissCham Shanghai 中国瑞士商会--上海

Floor15-C, 1078 Jiang Ning Road, 200060 Shanghai
上海市江宁路1078号15楼C座 200060 上海
Tel 电话: + 86 21 62761171
Fax 传真: + 86 21 62760819
Email/电子邮件: info@swisscham.org

SwissCham Board Members in Shanghai 上海董事会成员

Zhanbing Ren
Director, President
任占并, 主席
Tel 电话: + 86 21 5774 3366
E-mail 电邮: zhanbing.ren@bobstgroup.com

Christian Guertler, Chairman Swiss Cham China
哥特乐, 主席
Tel 电话: + 86 21 2890 9661
E-mail 电邮: guertler@online.sh.cn

Nicolas Musy
Director, Vice-President
尼古拉・摩西, 副主席
Tel电话: + 86 21 6266 0844 / 45
E-mail 电邮: n.musy@ch-ina.com

Walter Akeret
Board Member
亚华德, 董事会成员
Tel 电话: + 86 21 5442 7500
E-mail 电邮: walter.akeret@kuk.ch

Daniel Heusser
Director, Event Officer
侯德宁, 会务理事
Tel 电话: + 86 21 6240 8882
E-mail 电邮: d.heusser@virtuarch.net

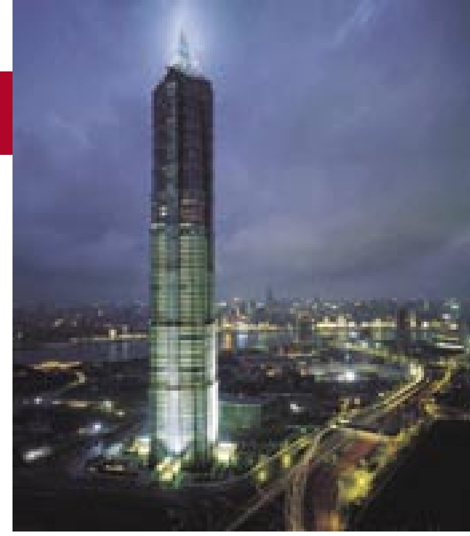
Victor Chiam
Board Member
詹道平, 董事会成员
Tel 电话: + 86 21 6430 6868
E-mail 电邮: Victor.Chiam@sulzer.com

Patrick R. Scheibli
Director, Event Officer
夏比利, 会务理事
Tel 电话: + 86 21 5887 2316
E-mail 电邮: patrick.scheibli@fracht-shanghai.com

Franc Kaiser
Director, Service Officer
法兰克, 服务理事
Tel 电话: + 86 21 5298 1806 Ext :623
E-mail 电邮: fkaiser@fiducia-china.com

Jonathan Selvadoray
Director, Public Affairs Officer
苏杰楠, 公共事务理事
Tel 电话: + 86 21 6289 6363
E-mail 电邮: jonathanselvadoray@hotmail.com

Sandro Willi
Director, Membership Officer
魏圣卓, 会籍发展理事
Tel 电话: + 86 21 5951 5187 Ext :22
E-mail 电邮: sandro_willi@luwa.com.cn



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www.swissclubshanghai.com
info@swissclubshanghai.com

Swiss Consulate General in Shanghai / Swiss Business Hub Shanghai
瑞士驻上海总领事馆 / 瑞士商务促进中心 上海

22F, Bldg. A, Far East International Plaza, No. 319, 200051 Shanghai
上海市仙霞路319号远东国际广场A幢22楼, 200051 上海
Opening hours/工作时间:
from Mo – Fr 9 – 12 am /周一至周五上午9点至12点
Phone 电话: + 86 21 6270 0519 – 21
Fax 传真: + 86 21 6270 0522
Email 电子邮件: Vertretung@sha.rep.admin.ch

Useful Contacts Worldwide
全球 重要联络机构

Swiss Business Council in Hong Kong

G.P.O. Box 9501
Hong Kong
香港邮政总局信箱9501号
Tel 电话: + 852 2524 0590
Fax 传真: + 852 2522 6956
Email 电子邮件: swissbiz@netvigator.com

Swiss Chinese Chamber of Commerce--Switzerland
中国瑞士商会--瑞士

Höschgasse 83,
CH-8008 Zurich, Switzerland,
Tel 电话: + 41 1 421 38 88
Fax 传真: + 41 1 421 38 89
Email/电子邮件: info@sccc.ch
www.sccc.ch

Swiss Consulate General in Hong Kong 瑞士驻香港总领事馆

Suite 6206-07, Central Plaza,18 Harbor Road, Wanchai
Hong Kong
香港湾仔港湾道18号中环广场6206-07室
Tel 电话: + 852 2522 7147
Fax 传真: + 852 2845 2619
Email 电子邮件: swisscg@hon.rep.admin.ch
or/或者 Vertretung@hon.rep.admin.ch

General Information 简介

www.swissinfo.org
www.switzerland.com.cn
www.admin.ch (Swiss Government website 瑞士政府网站)