



What to Expect From the Year of the Tiger? 虎年期待什么?

Exclusive Results of 2nd SwissCham China Confidence Survey
中国瑞士商会第二次信心指数独家调查结果

The King of Croissant – Interview with Gerard Dubois of La Rose Noire
羊角面包大王——专访香港黑玫瑰(La Rose Noire)公司总裁Gerard Dubois

“Capital is Even Cheaper than Labor in China”, says CEIBS Prof. Wang Jianmao
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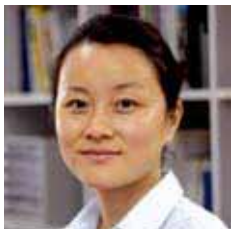
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Dear Readers, Members & Friends

The most important at the beginning: The Chinese Economy bottomed out in the middle of 2009 and is rebounding strongly at a healthy GDP growth rate of 9%. The Government stimulus packages are effective and are boosting the investment in infrastructure with a focus on the inner provinces. Swiss businesses which have a strong leg in the Chinese domestic markets were least affected by the global downturns and will benefit most from the push in local demands. The classical China business model, based on benefiting from comparative cost advantages seems to be outdated. The fight for talented managers and skilled staff who can effectively operate in a Chinese environment will be even stronger and hence the pressure to increase remuneration packages.

This End-of-the Year edition of The Bridge has a strong focus on macroeconomics. Our very own SwissCham Confidence Survey has yielded some exciting results: The confidence of Swiss companies doing business in China is resiliently high and increasing.

The last couple of months have witnessed a string of high profile Swiss Government visitors to China: Federal Councilor Eveline Widmer-Schlumpf meet her counterpart Wu Aiyang, Minister of Justice, in Beijing and was the guest of honor at the topping of the roof ceremony of the Swiss Pavilion at the World Expo 2010 in Shanghai. Secretary of State Mauro Dell'Ambrogio responsible for the State Secretariat of Science and Research met with various government officials and the leadership of universities. The idea of supporting Swiss businesses by helping to establish the Swiss system of apprenticeship and vocational schools in China was brought up during a luncheon with GM's in Shanghai.

2010 will bring an unprecedented amount of events to the Swiss Business community in China. The World Expo 2010 in Shanghai and the Celebration of 60 Year of diplomatic relations between China and Switzerland are setting the exciting framework for it.

I wish you, your families, employees and business partners a festive season, Merry Christmas and a prosperous, healthy and happy 2010 and Chinese New Year of the tiger!

Yours truly



Christian Gürtler

致读者和会员朋友:

开宗明义: 中国经济于2009年中下滑至谷底, 而后强劲反弹, 当前正以9%的GDP增幅稳健成长。政府的刺激经济增长计划推动了以内陆省份为主的基础设施投资, 颇显成效。此轮世界经济危机中, 在中国市场上表现强劲的瑞士商户受损最少, 而由于本地经济需求受驱动增长, 瑞士商户将成为最大的受益者。传统上以比较成本优势为基础获利的中国商业模式似乎正在被淘汰。而对于中国市场上管理人才和熟练员工的争夺战将日趋激烈, 福利薪酬也会随之面临调整压力。

本期《桥》年终版以宏观经济为关注焦点。中国瑞士商会开展的信心指数调查, 结果非常喜人: 在华瑞士企业对于在中国经营的信心正持续走高。

过去几个月中, 瑞士政府高官频频访华: 联邦议员Widmer-Schlumpf在北京会见了中国司法部长吴爱英, 并作为贵宾参加了2010年上海世博会瑞士国家馆的封顶仪式。负责联邦科研事务的国务秘书Mauro Dell'Ambrogio会见了多个政府官员和大学领导, 并与瑞士在上海的企业家举行午餐会, 提出在中国建立瑞士式学徒制度和职业学校以促进瑞士企业在华发展。

展望2010, 瑞士在华企业将会迎来空前丰富的活动。2010年上海世博会的召开和中瑞建交60周年庆典将为这喜庆的一年奠定基础。

在此, 我祝贺您以及您的家人、员工和商业伙伴节日愉快、圣诞快乐, 祝愿你们2010虎年事业有成、健康幸福!



Christian Gürtler

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The Sky is the Limit

SwissCham Confidence Index scores even higher than a year ago

By Alain Kaiser (survey) and Fabian Gull (text)



INSIGHTS: The Second SwissCham Business Sentiment Survey brought surprising findings to light.

“**C**onfidently Resilient” was the title condensing the findings of last year’s first ever “Business Confidence Survey” which SwissCham China conducted amongst the Swiss business community in China. Despite a gloomy world economic outlook at that time, the results showed surprisingly high overall levels of confidence in successfully doing business in China. But concerns about the accuracy of the results arose, when the situation worsened drastically right after the survey had been conducted. If the survey had been conducted only a month or two later last year - analysts at SwissCham Shanghai were convinced - the results would not have come out that positively anymore. Thus, assuming last year’s values to be rather too high, some were expecting a lower overall business confidence in this year’s survey.

Confidence Index at astonishing 80%

Now the results of the latest SwissCham survey are out (and again) show surprising results. Firstly, the Swiss business community in China is even more confident than a year ago. The SwissCham Confidence Index is now reaching 75% (66% in 2009) for 2010 and an astonishing 80% for the next five years period (78% in 2009). For better understanding: A value of 0% on a scale means “no confidence at all” whereas 100%

represents an “extremely high” level of confidence. In other words - compared to last year, the participating businessmen in China are 9% more confident for next year and 2% more confident to successfully run their operations in the mid-term period of the upcoming 5 years. Secondly, these findings also show that our concerns about the accuracy of last year’s results were not justified, and retrospectively confirm the correctness of last year’s findings. (See chart 1 and 2)

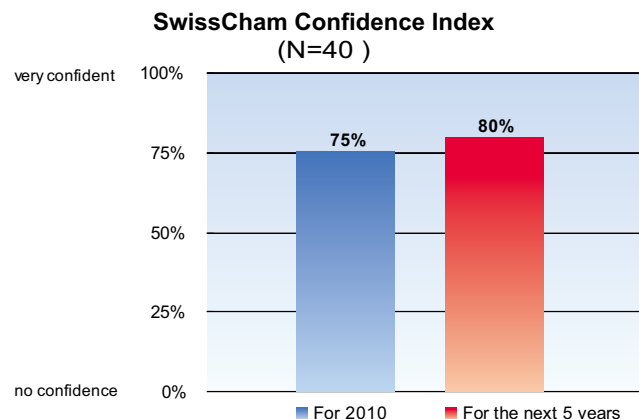


Chart 1. How confident are you for 2010 and for the next 5 years?

Participants Level of Confidence
(N=40)

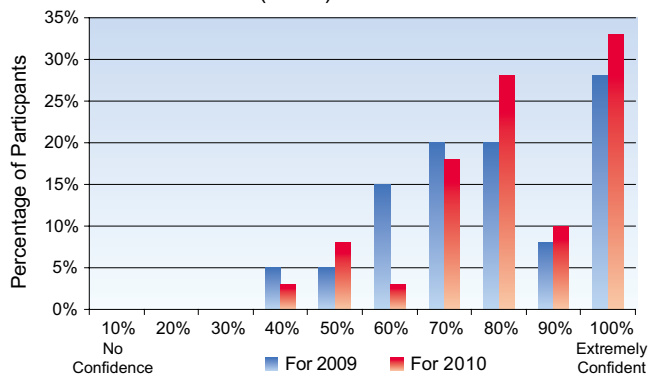


Chart 2. How confident are you for 2010 and for the next 5 years?

The survey, which in volume has been substantially expanded aiming to provide even deeper insights for first line managers, shows some more good news. Both the expected development of the labour force and investments reflect the participants' high spirits. Two thirds of the participants plan to increase their labour force in China in 2010, whereas 30% intend to remain at the same level. Last year, on average, the participants intended to increase their headcount by 5%. Today, they plan to hire 15% more staff in 2010. A negligible 2% want to decrease the labour force compared to 15% last year. The participants intentions to increase their activities in various fields are shown in chart 4.

Compared to 2009, do you plan to increase or decrease your laborforce in 2010?
(N=38)

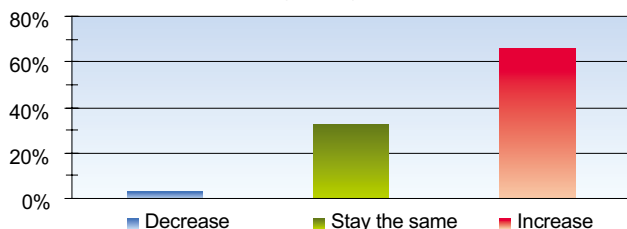


Chart 3. Expected development of labour force in 2010

Participants Plans to Increase or Reduce Activities
(N=42)

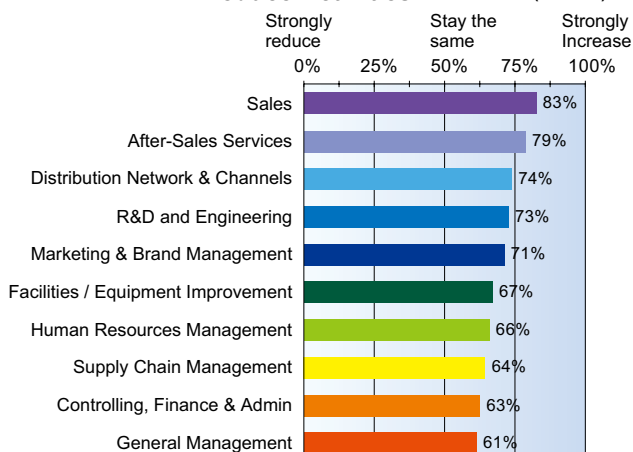


Chart 4. In which fields do you plan to increase your activities?

Slowed dynamism in investments

An only partly similar picture comes to light when analyzing investment intentions. 50% of the participants plan to invest more in 2010 compared to 2009. Only a very low 3% intend to spend less on investments. The key changes in this field are: less people intend to lower their investments – only 6% compared to 10% the year before. And the average investment projection is slightly lower this year. On average, business leaders intend to increase investments by 10% compared to 15% last year.

Major concerns – major shifts

Major and highly interesting shifts can be observed regarding participants' biggest concerns. The new top concern is no longer the economic slowdown, which predictably ranked highest last year, but "finding and hiring suitable talent". Concerns about the global economic slowdown now rank 4th. This insight definitely comes as a surprise, as finding suitable talent is usually a big concern in times of economic booms.

Despite that GDP growth rate in China is back to 9% in the 3rd quarter of 2009, one could have expected that during the slowdown witnessed in the last 12 months (with GDP growth going down from 11% to under 6% before rebounding), talent shortage would not be an issue with millions of workers being laid off, millions of university graduates encountering difficulties to find employment as well as plenty of experienced employees looking for new jobs. This assumption has now been proven wrong, as the SwissCham survey results show (see chart 5).

Participants Biggest Concerns in China (N=42)

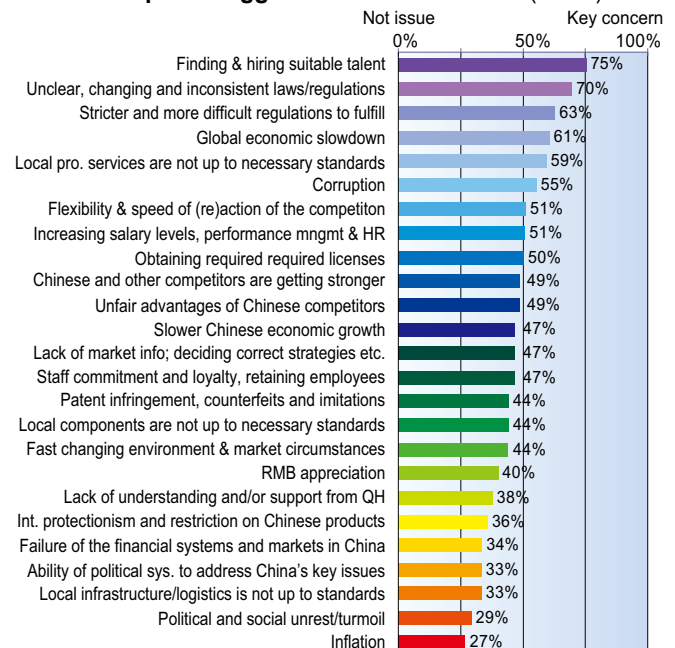


Chart 5. Company concerns

Second and third biggest concerns are both related to legal difficulties, uncertainties and problems to meet regulations encountered in China. Generally, the most striking difference when comparing the concerns from 2008 with those from 2009, is the downward shift of all cost factors. As of today, increasing labor costs, RMB appreciation, and surges in raw material prices are not anymore key concerns that they used to be only

12 months ago.

To exemplify this statement, let's have a look at inflation. In last year's survey results, inflation was the 4th biggest concern among Swiss business leaders. Today, as a result of the cooled off Chinese economy, concerns about inflation are no longer an issue and rank last. This, of course, does not imply that participants do not expect inflation; but simply demonstrates that they are not concerned about it at all. Also to be seen in this context, is the downward shift of worries related to increasing wages from the second position (2008) to the 8th rank (2009). (See chart 8)

Increase in disposable income for Swiss companies' employees

Of much interest for decision makers might also be how much the participating General Managers and CEO plan to adjust salaries in 2010. We want to highlight two main findings: more than 50% of the companies plan to increase salaries next year, but only by an average of 6% which is a lower increase than a year ago. But what really matters for salary recipients in the end, is not the percentage of nominal salary increase but how many goods and services they can afford to buy with their salary. So inflation needs to be taken into account. Inflation in China last year was at an average of 6%, and 40% of the participants expected salaries to go up by also 6%. 35% planned to increase wages by more than the inflation rate. For 2010, the picture in real terms (taking expected inflation into account) is a rosier one. More than 50% plan to increase wages by more than the inflation rate. This statement is based on an expected inflation rate between 0%-1% for this year. A little less than 50% won't change salaries from 2009 (see charts 6 and 7).

Participants Expected Salary Variance for 2010

(N=40)

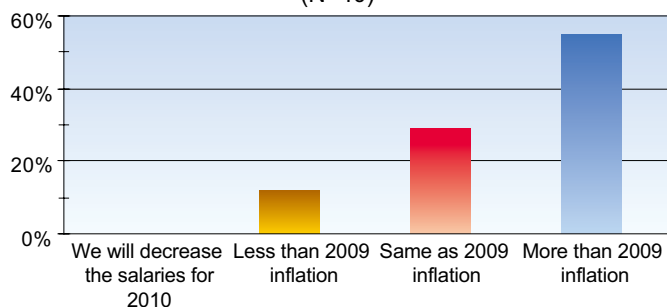


Chart 6. Expected salary increase for 2010

Participants Expected Salary Increase for 2010

(N=24)

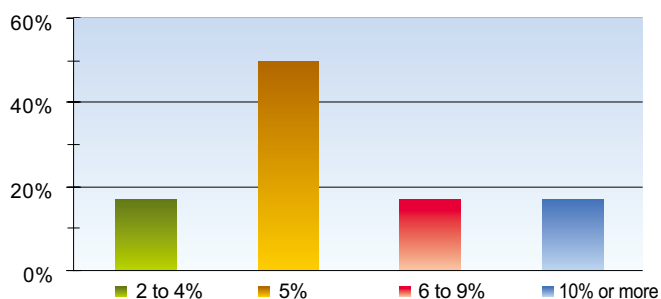


Chart 7. Expected salary increase for 2010

In the coming 2 to 3 years, participants are expecting the following costs to: (N=42)

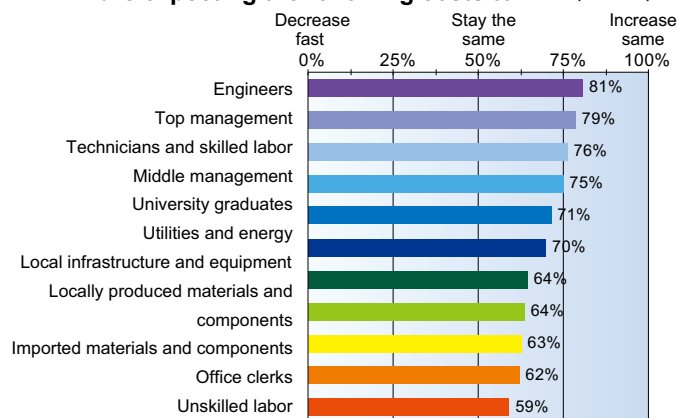


Chart 8. Cost trends

Participants by Sector of Sales

(N=27)

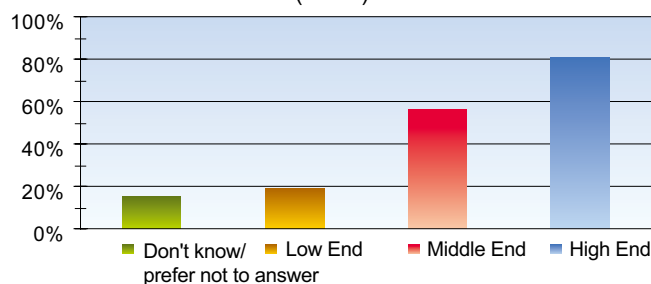


Chart 9. Sales by Sector

Factors for Sales Success in China (N=39)

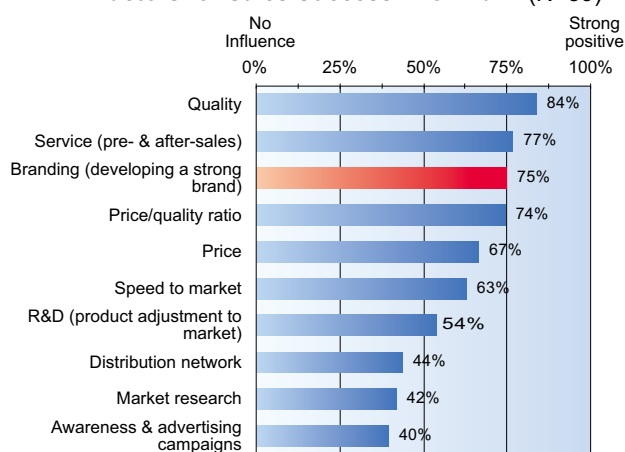


Chart 10. Success factors

Compared to Europe, Participants Think the Competition in China is: (N=42)

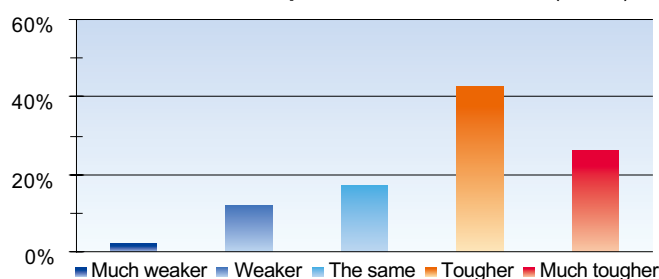


Chart 11. Competition

Participants' Information:**Job position:** 85% are in CEO/GM positions**China experience:** More than 66% of the participants have more than 3 years of China experience. One third more than 6 years.**Working condition:** 11% of the participants are entrepreneurs, 89% are employees managing a subsidiary of a Swiss company in China.**Legal form:** 80% of the companies are WOFE**Number of employees in China:** Two thirds of the companies employ less than 250 staff members.**Turnover:** 40% generate an annual turnover of below RMB 50M. 30% generate between RMB 51M and RMB 250M.**Industry:** 66% run manufacturing companies. 33% run service companies.**SwissCham China Business Confidence Survey 2009**

What perceptions and expectations for the near and distant future do Swiss business leaders in China have and what are their key concerns? And what are the major changes compared to last year's findings? This is what SwissCham was aiming to find out in conducting its much extended "Second Business Sentiment Survey" among its members, this year in cooperation with CEIBS Shanghai (China Europe International Business School).

Main Findings at a Glance

- The Swiss business community in China is even more confident than a year ago.
- For 2010: Confidence Index now reaching 75% (66% in 2009).
- For the next five years: Confidence Index climbs up to 80% (78% in 2009).
- New top concern is "Finding and Hiring Suitable Talent".
- Last year's top concern "Global Economic Slowdown" now ranks 4th.
- Two thirds of the participants plan to increase their labour force in China in 2010.
- Last year, the average intended increase of headcount was 5%. For 2010, this figure is at 15%.
- 50% of the participants plan to invest more in 2010 compared to 2009.
- Slowed dynamism in investments: Average increase of 10% compared to 15 % last year.
- More than 50% plan to increase wages by more than inflation rate.
- 70% think competition in China is tougher or much tougher compared to Switzerland.

Please do participate in the next SwissCham survey.

信心增长没有上限

中国瑞士商会信心指数高于去年同期

调查: Alain Kaiser 撰文: 方必安

“信 心有力回弹” 精炼的概述了去年中国瑞士商会第一次在华瑞士商业团体“商业信心指数调查”的结果。尽管当时全球经济前景黯淡, 调查结果却显示参加调查的企业家对于在华经营仍信心十足。但是由于在我们刚进行完调查后经济形势急转直下, 使得我们对调查结果的准确度有所担忧。中国瑞士商会—上海的分析人员认为, 如果去年我们进行调查的时间再晚一至两个月, 调查结果可能就不会是这么乐观。因此, 考虑到这些因素, 一些人认为今年的商业信心指数调查结果可能会比去年低。

调查结果证实准确

现在中国瑞士商会最新的调查结果已经出来了, 而且仍然十分令人意外。首先, 在华瑞士商业团体的信心指数比一年前更高。2010年中国瑞士商会信心指数已经达到75% (2009年信心指数为66%), 对于未来5年的信心指数高达80% (去年的结果是78%)。其中0%表示“毫无信心”, 100%表示“信心十足”。也就是说, 与去年同期相比, 参加调查的企业家对于明年的信心指数提高了9%, 对于未来5年的中期经营信心指数提高了2%。此外, 这一结果还表明我们对于去年调查准确度的担忧是不必要的, 反而证明了去年调查的准确性。

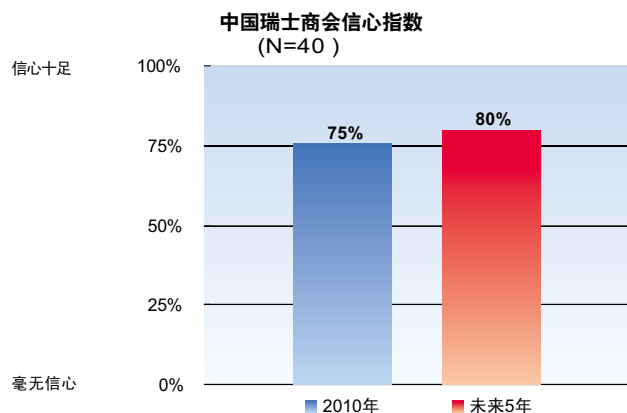


图1: 中国瑞士商会信心指数

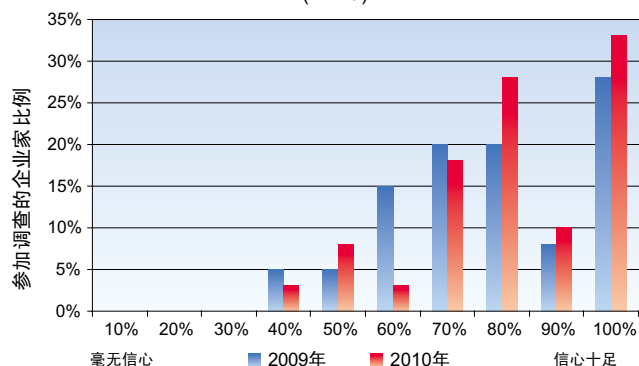
参加调查的企业家信心指数水平
(N=40)

图2：参加调查的企业家信心指数水平

为了使一线的管理人员有一个更深的理解，我们这次大幅增加了调查对象人数，以使调查结果提供更充分的信息。在员工发展和投资上的增加反映了企业家高涨的热情，三分之二的企业家计划增加2010年在中国的员工人数，30%的参与者表示员工人数将不变。去年企业家平均计划增加员工5%，而今年的调查中企业家计划2010年增加员工15%。只有很少的2%的企业家表示要削减员工人数，而去年是15%。

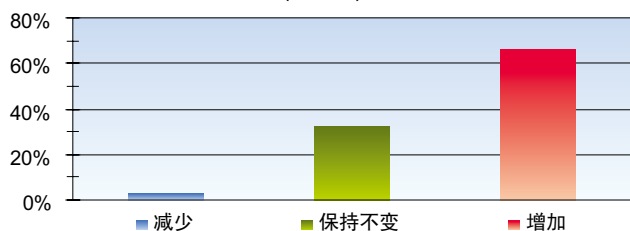
与2009年相比，2010年你打算
增加员工人数还是减少员工人数？
(N=38)

图3：参加调查的企业家对2010年的员工发展水平的预期

投资增长缓慢

在投资上的某些发现与去年相似。50%的企业家计划在2009年的基础上增加2010年的投资，只有3%的企业家表示要减少投资支出。在这一方面的主要变化是：计划减少投资的企业家变少了，跟去年的10%相比，今年只有6%。此外，平均计划投资水平也比去年略低。如下图所示，总的来说，与去年计划投资增加15%相比，今年的调查结果显示企业家只准备增加10%的投资。

企业家计划增加或减少的投资项目 (N=42)

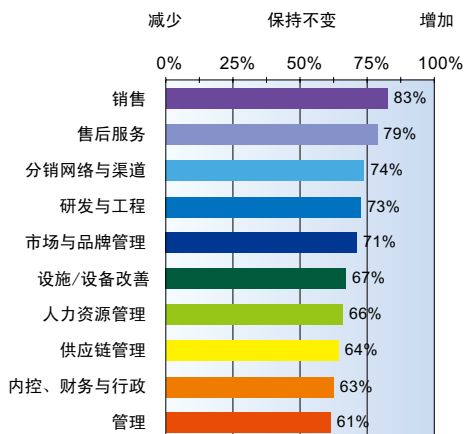


图4：企业家2010年投资预期与2009年的对比

主要的忧虑—变化最大

参加调查的企业家所在行业 (N=62)

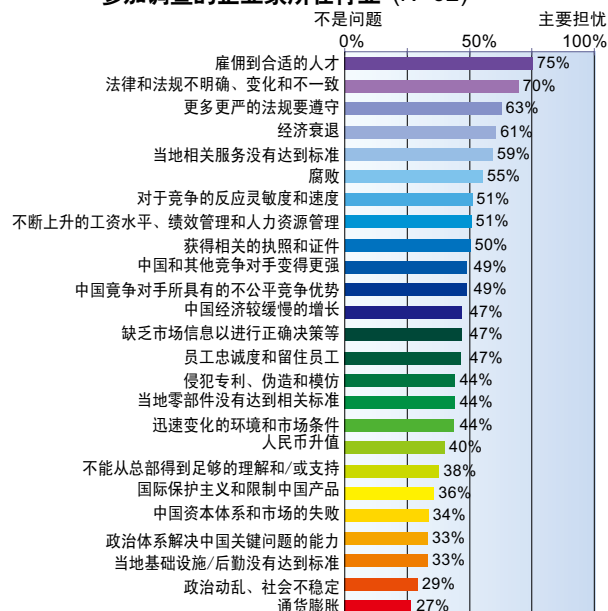


图5：企业的担忧

参与者最大的忧虑的调查结果与上一次相比有很大的不同。这次企业家最大的担忧不再是去年排在首位的经济衰退，而是“雇佣到足够的人才”，对于全球经济衰退的担忧只排到第四。这一结果无疑是很意外的，因为在经济高速增长时期或者人才紧缺的经济时期，人才都是首要的顾虑。但这两种情况对于目前的中国来说都不适用，虽然2009年第三季度中国的GDP增长再次达到9%的高水平，人们可能会认为人才不会有问题，因为过去一年的增长放缓（GDP增长从11%降到最低点的6%以下）使得上百万人失业，上百万大学生遭遇就业困难以及大量经验丰富的人才在找新工作，可是中国瑞士商会的调查结果显示事实并非如此。

第二和第三大担忧都与法律上的困难、不确定性以及履行相关法规时存在的问题等相关。总而言之，2009年关于最大担忧的调查结果与2008年相比最大的不同，就是人们对于所有涉及到成本的因素的担心程度下降了，如员工工资上涨和人力成本增加、人民币升值、原材料价格上涨等都已不再像一年前那样令人担忧。

举个例子来说，在去年的调查结果中，通货膨胀是瑞士在华企业家的第四大忧虑，而现在，随着中国经济不断降温，通货膨胀已不再是人们的主要顾虑，并排在所有忧虑因素的最后。当然，这并不表示企业家认为不会有通货膨胀，而只是企业家对它的担忧减少了。我们同时可以看到企业家对于工资上涨的担忧从2008年调查的第二位降到了目前的第八位（见图表）。

员工工资将有所提高

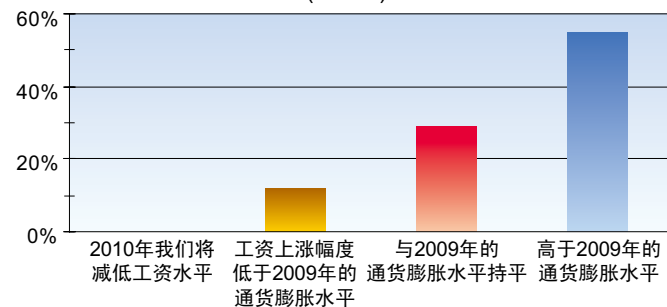
参加调查的企业家对2010年工资水平的变化预期
(N=40)

图6：2010年工资水平上涨预期

计划2010年提高工资水平的企业家
(N=24)

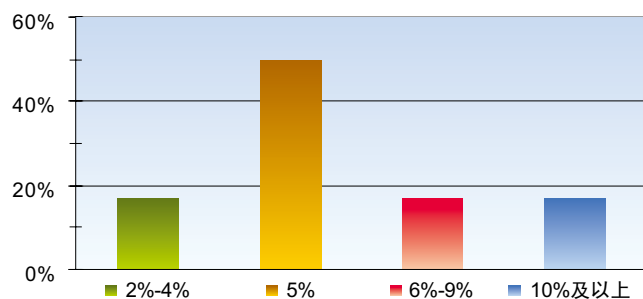


图7: 2010年工资水平上涨预期

在未来的2-3年里，企业家对于成本的预期如下 (N=42)

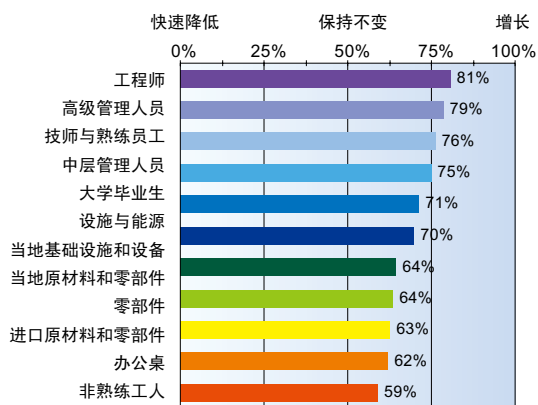


图8: 成本趋势

决策者很感兴趣的恐怕还包括参与调查的总经理和首席执行官们对于2010年工资调整的计划。在这方面我们主要有两大发现：50%以上的企业计划明年提高工资水平，但增长幅度只有6%，比去年低。不过对于员工来说最重要的不是名义工资的增长幅度，而是用这些钱可以购买的商品和服务的数量。因此，通货膨胀因素也应该被考虑在内。中国去年的平均通货膨胀率为6%，40%参与调查的企业家认为工资会上涨6%，其中35%的企业家计划工资的增长幅度高于通货膨胀水平。而对于2010年来说，情况要好得多（将通货膨胀因素考虑在内），50%以上的企业家计划工资增长的幅度高于通货膨胀水平，这一结果是基于对明年通货膨胀率在0%-1%之间的预期来说的。不到50%的企业家表示2010年不会提高工资水平。

(N=27)

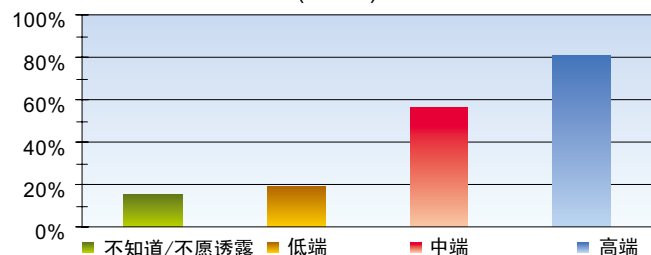


图9: 参加调查的企业按销售领域划分

在中国销售成功的要素 (N=39)

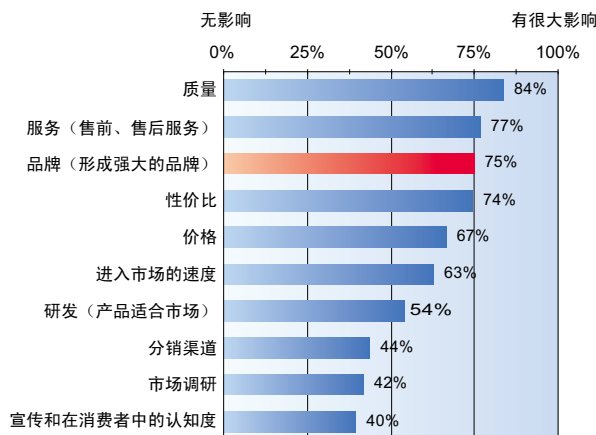


图10: 成功要素

与欧洲市场相比，企业认为在中国的竞争 (N=42)

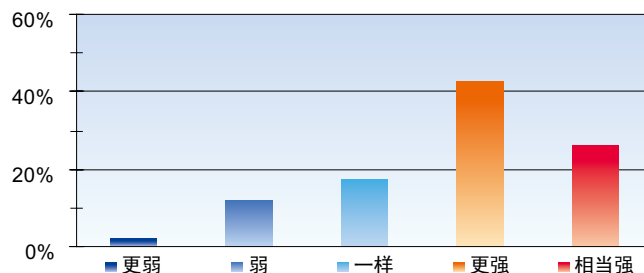


图11: 竞争

参加调查的企业家信息:

工作职位: 85%为首席执行官/总经理

在华工作经验: 66%的企业家具有3年以上在华工作经验，三分之一具有6年以上在华工作经验

工作环境: 11%的参加调查者为创业者，89%为瑞士企业在中国分支的管理人员

法律形式: 80%的企业为外商独资企业

在华员工人数: 三分之二的企业在中国拥有不到250名员工

收入: 40%的企业年收入不到5000万元，30%的企业年收入在5100万元到2.5亿元之间

行业: 66%为生产型企业，33%为服务型企业。

主要调查结果

- 在华瑞士商业团体今年比去年更自信
- 对2010年的信心指数已达到75%（去年对2009年的信心指数为66%）
- 对未来五年的信心指数上升到80%（去年调查时对未来五年的信心指数为78%）
- 新的最首要的忧虑因素为“雇佣到合适的人才”
- 去年的最首要的忧虑因素“全球经济衰退”今年排到第四位
- 2/3参加调查的企业家计划2010年增加在华员工人数
- 去年企业家计划2009年平均增加员工5%，今年企业家计划2010年平均增加员工15%
- 50%参加调查的企业家计划2010年增加投资
- 投资幅度增长缓慢：今年企业家计划增加投资10%，去年为15%
- 50%以上的企业家计划工资的上升水平高于通货膨胀水平
- 70%的企业家认为中国的竞争比瑞士更激烈

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Personal Views

What Swiss business leaders in China expect for 2010



André Pometta
President
Firmenich
1 years of China experience
450 employees in China



Claudia Masueger
GM & Partner
MQ Wines Ltd. China
6 years of China experience
10 employees in China

1. What is your company doing?

We sell flavors and fragrance which is a sub-segment of the fine chemical industry.

Wine trading company.

2. Describe your overall business confidence to do successful business in China for next year and for the next 5 years.

I'm very confident. We depend on purchasing power and size of population. At least one of the two will grow significantly.

Very confident as I see high potential on the domestic market. More and more Chinese consumers can afford to buy imported products. And the Expo will create further business opportunities.

3. What are your biggest concerns regarding your company's business activities in China in 2010?

Biggest challenge is to make sure that the "grey mood" in Europe/America does not result in under investments in China. Keeping key talents and attracting top performers is a permanent issue.

The complex, always changing, still unstructured and very bendable Chinese law and regulations. It's very difficult to get detailed and correct information. In addition, there are more and more competitors. Hopefully, China will be politically stable.

4. My personal resolution(s) for 2010:

Strengthen the organization to be ready for the next wave of rapid growth.

Stay flexible to cope well with the daily challenges and adventures.



Veronique Ducassy
Managing Director
Kuoni Travel China
7 years of China experience
20 employees in China



Christine Li
Country Manager
Swiss International Air Lines
14 years of China experience
16 employees in China

1. What is your company doing?

Tours for foreigners (transfers, hotel reservations, visits with guides, meals, domestic flights, etc) for different segment markets like leisure, mice (meetings, incentive, conference, exhibition), business delegations and more.

Swiss is the national airline of Switzerland and serves with its fleet of 86 aircraft worldwide 90 destinations in 42 countries.

2. Describe your overall business confidence to do successful business in China for next year and for the next 5 years.

China is becoming one of the most successful countries in the world for tourism and we expect to take a good share of it. Mice business is also a big business in this country and the infrastructure is there.

China is the second biggest aviation market in the world and is still growing, while most other markets are experiencing a decrease. The emerging Chinese middle class is a further potential for long-term growth. For the next year we also expect a demand growth due to the World Expo in Shanghai.

3. What are your biggest concerns regarding your company's business activities in China in 2010?

Foreign companies encounter different challenges as our local competitors. Recruitment of skilled staff and the Chinese labour law constraints are also concerns and we do not expect any improvement in the future.

Global economic situation and changed corporate travel policies. Many business or first class passenger travel less or fly economy class instead. On the Shanghai route we expect slight improvements due to the World Expo 2010.

4. My personal resolution(s) for 2010:

To consolidate our actual business and take more shares from the competition.

Keep offering high-quality service to our customers based on our core values "personal service", "in-depth quality" and "typical Swiss hospitality".

Personal Views

What Swiss business leaders in China expect for 2010



Patrick Ronald Scheibli
Managing Director
Fracht (Shanghai) Ltd
8.5 years of China experience
30 employees in China

1. What is your company doing?

International freight forwarding/logistics provider.

2. Describe your overall business confidence to do successful business in China for next year and for the next 5 years.

Fracht is well positioned in the market and prepared for the challenges ahead. I do not see any big difference for us comparing 2010 with the upcoming 5 years' period. Overall, especially if we are looking at our suppliers, things are looking differently. Many shipping- and air lines are financially struggling which certainly has an impact on the service level.

3. What are your biggest concerns regarding your company's business activities in China in 2010?

Main concern is that it is all about the rate and service doesn't matter anymore in China. You can provide an excellent service over the years but some shippers are prepared to switch to a local competitor just for the sake of saving USD 10 per container.

4. My personal resolution(s) for 2010:

Keep going and see it the positive way of life.



Alan Debonneville
CEO / Owner
ChildUp.com and Alterego Networks
7 years of China experience
5 employees in China

ChildUp is a pioneer in parenting education, offering easy, simple and practical solutions, via e-learning courses and practical tools like game cards, to help parents mentor their children into a successful student and an exceptional person.

ChildUp is going to launch courses in Putonghua for the Chinese market in 2010, exploring both online learning as well as face to face training in Shanghai. With the 1 child policy, parents in China are very keen to invest for their children's benefit, therefore the market for early learning and parent education is ripe for growth.

Finding the right partners in China. No other big worry as the field of parent education is new and still untapped.

Be able to manage my businesses from anywhere by end of the year.



Ivo A. Hahn
CEO Greater China & Vice
Chairman Global Practice Groups
Stanton Chase International
26 years of China experience
35 employees in China

1. What is your company doing?

Executive Search Consulting, often called "head-hunting".

2. Describe your overall business confidence to do successful business in China for next year and for the next 5 years.

High confidence, China continues to have a serious shortage of talent. Thus, professional executive search services are increasingly in demand.

3. What are your biggest concerns regarding your company's business activities in China in 2010?

No industry standards in executive search, everyone claims to be a headhunter. But, there are no shortcuts.

4. My personal resolution(s) for 2010:

Expand our market position in Greater China; currently we ranked amongst the top 5 firms.



Li Du
General Manager
Sauter Beijing Co. Ltd.
25 years of China experience
60 employees in China

Building management systems and laboratory control systems for both Industrial and commercial buildings.

Highly confident, as the Chinese government has defined the life-science industry to be a major development focus for the years to come. With our experience, special high quality products and lab control being one of our core competences, we believe we are well positioned.

Road shows or similar marketing promotions will be really important. Generally, marketing investment is the key to step further in China or not.

Personnel development according to business demand and convince management to inject on marketing by achievements.

个人视角

在华瑞士企业家对2010年的期望



André Pometta
总裁
芬美意香料有限公司
拥有1年在华经验
在中国拥有450名员工



Claudia Masueger
总经理/合伙人
MQ Wines Ltd. China
拥有6年在华经验
在中国拥有10名员工

- | | | |
|--|--|---|
| <p>1. 请用简单的语言介绍一下你们公司的主要业务？</p> | <p>我们销售香料和香水，属于精细化工行业。</p> | <p>我们是一家葡萄酒贸易公司。</p> |
| <p>2. 您对明年以及今后五年在华经营的信心有多大（将有哪些不同？为什么？）</p> | <p>我很有信心。我们的经营主要依靠采购力度和人口数量，我想这两个因素中至少有一个会大幅增长的。</p> | <p>我很有信心并看好内地市场的潜力。因为越来越多的中国消费者有能力消费进口商品，而且我相信世博会也会带来更多的商业机遇。</p> |
| <p>3. 对于你们公司的经营活动来说，2010年哪些因素最令您担忧？为什么？您认为这一情况会很快好转吗？</p> | <p>最大的挑战是确保欧洲/美国的低落的情绪不会影响到中国的投资，另外保留住关键人才并吸引更多的人才是一个长期面临的问题和挑战。</p> | <p>最担忧的是中国复杂多变且尚不太成熟的法律和法规，因为这样我们很难获得详细而准确的信息。此外，中国的竞争者越来越多。我希望中国在政治上将保持稳定。</p> |
| <p>4. 2010年个人的发展计划：</p> | <p>巩固我们的团队以迎接新一轮的高速增长。</p> | <p>灵活应对每天的挑战与冒险。</p> |



Veronique Ducassy
常务董事
Kuoni Travel China
拥有7年在华经验
在中国拥有20名员工



Christine Li
中国区经理
Swiss International Air Line
拥有14年在华经验
在中国拥有16名员工

- | | | |
|--|--|---|
| <p>1. 请用简单的语言介绍一下你们公司的主要业务？</p> | <p>为不同目的来中国旅游的外国人提供如休闲、mice（会面、方案、会议与展览）、代表团接待等服务（换乘、预订酒店、导游服务、餐饮、国内航班预订等）</p> | <p>航空业务。</p> |
| <p>2. 您对明年以及今后五年在华经营的信心有多大（将有哪些不同？为什么？）</p> | <p>中国已成为世界旅游行业最成功的国家之一，我们希望成为其中的一分子，mice业务已成为这个国家很大的商业活动，而且许多基础设备都是现成的。</p> | <p>中国是世界第二大航空市场，当其他国家面临增长放缓时中国仍在快速增长。中国正在崛起的中产阶级是我们长期增长的潜在动力，明年世博会召开期间我们希望有较大的增长。</p> |
| <p>3. 对于你们公司的经营活动来说，2010年哪些因素最令您担忧？为什么？您认为这一情况会很快好转吗？</p> | <p>外国企业遇到的挑战与国内企业不同，我们的主要担忧是能否雇佣到合适的人才以及中国劳动法的一些规定，我们认为未来不会有太大改观。</p> | <p>全球经济形势以及企业改变出差政策，如以前许多乘坐商务舱或头等舱的乘客现在开始乘坐经济舱。我们希望我们的上海航线在明年世博会期间能有所增长。</p> |
| <p>4. 2010年个人的发展计划：</p> | <p>巩固我们的实体业务，在竞争中获取更多市场份额。</p> | <p>在我们公司的核心价值观“人性化服务”、“无微不至”与“瑞士风格”的基础上继续为乘客提供高质量的服务。</p> |

个人视角

在华瑞士企业家对2010年的期望



Patrick Ronald Scheibli

执行董事
Fracht (Shanghai) Ltd
拥有8年在华经验
在中国拥有30名员工



Alan Debonneville

首席执行官/创始人
ChildUp.com and Alterego Networks
拥有7年在华经验
在中国拥有5名员工

1. 请用简单的语言介绍一下你们公司的主要业务？ 国际货运与物流。

2. 您对明年以及今后五年在华经营的信心有多大（将有哪些不同？为什么？）

Fracht的市场定位很好并为今后的挑战做好了准备。我认为2010年我们公司的经营与今后五年没有太大差别。总的来说，从我们的供应商方面来看，情况在慢慢发生变化。许多水运与航运航线在财务上的挣扎必定影响服务层面的业务。

3. 对于你们公司的经营活动来说，2010年哪些因素最令您担忧？为什么？您认为这一情况会很快好转吗？

最担忧的是今后在中国价格将决定一切，服务变得不再重要。我们一直以来为客户提供优质的服务，可是客户却准备转换到每个集装箱价格便宜10美元的国内公司。

4. 2010年个人的发展计划：

继续努力并积极的看待事物。

ChildUp是家长教育的开创者，它通过网上学习课程和如游戏卡等实践工具提供简单易懂的实践解决方案，帮助家长辅导孩子成为一个合格的学生和出色的人才。

2010年ChildUp将在中国推出普通话课程，尝试在上海提供网上学习与面对面的培训。独生子女政策使得中国的家长十分重视对子女的投资，因此早期教育和家长教育市场已经趋于成熟并有待发展。

主要担忧是招到合适的合作伙伴。因为这个领域很新并且没有充分发展，所以目前需要担忧的因素不是很多。

年底前可以在任何地方管理我的生意。



Ivo A. Hahn

大中华区首席执行官及Global Practice Groups副主席
Kuoni Travel China
拥有26年在华经验
在中国拥有35名员工



Du Li

总经理
Sauter Beijing Co. Ltd.
拥有25年在华经验
在中国拥有60名员工

1. 请用简单的语言介绍一下你们公司的主要业务？ 高级主管猎头公司。

2. 您对明年以及今后五年在华经营的信心有多大（将有哪些不同？为什么？）

我信心十足，中国仍然存在着严重的人才短缺问题，因此，对于高级人才搜索服务的需求在不断增加。

3. 对于你们公司的经营活动来说，2010年哪些因素最令您担忧？为什么？您认为这一情况会很快好转吗？

在高级人才搜索上没有相关行业标准，以至于每个人都可以说自己是猎头。不过任何事情都没有捷径。

4. 2010年个人的发展计划：

扩展我们在大中华区的定位，目前我们是这个领域前五名的公司。

为工业与商业建筑建立管理体系与实验室控制系统。

我很有信心，因为中国政府将把生命科学作为未来几年发展的重点。以我们公司的经验，以及具有核心竞争力的高质量的产品和实验室控制系统，相信我们将占据有利的地位。

路演以及相似的市场促销会很重。总的来说，市场投资将是我们能否在中国进一步发展的决定性因素。

根据业务的发展进行个人发展，通过不断取得成果说服管理层对市场进行投资。

“Capital is Even Cheaper than Labour in China”

“Regional disparities help to cope with the crisis”, says Prof. Wang Jianmao

Interview, Fabian Gull



WANG JIANMAO: “China's exports as percentage of GDP will go down.”

Wang Jianmao

Wang Jianmao, is the current economic recovery in China sustainable?

The key concept is clear: According to my research, the sustainable future growth level for China's economy, the so called trend growth level, will be around 9%. And that's where we currently are. This also implies that in recent years China grew way too fast, for example in 2007 when the economy grew 13%.

Why is growing fast bad for China?

For two reasons: Bubbles and the creation of excess capacities. Due to China's current growth model, high growth must be driven by excessively high investment which automatically leads to bubbles and excess capacities.

China went through a sharp slump in export demand. What will be the role of exports in the future?

I believe that exports as a percentage of GDP will go down.

Why?

Mainly because the Chinese economy today is already too big for the outside world to absorb its excess capacities. And these excess capacities cannot be exported as easily as before.

What will China's future growth rely on?

Domestic demand.

What can boost domestic demand?

To boost private consumption, you have

to increase people's income. But let me clarify something first: domestic demand consists of private consumption, public consumption and investment. So investment, which is already too high in China, is also domestic demand. On the other hand, private consumption in China (compared to developed countries) is very low and was somewhere around 35% in the past few years. Ideally, private consumption in China accounts for about 50% of GDP. But the challenge is: to boost private consumption you have to increase people's income. But of the 30 years during 1979-2008, per capita disposable income of Chinese households grew slower than GDP per capita in 23 years. That is a big problem.

Saving rates are very high in China. Is this a problem?

I think the household saving rate is ok and currently at a level similar to India. The high saving rates you refer to are mainly because of high corporate savings, especially of state-owned enterprises, and government savings. In recent years we did not see a significant increase in the household saving rate, but we did see a significant increase in the so called corporate saving rate and also, to a lesser extent, government saving rate. That is the problem. Government and mainly state-owned enterprises accumulated huge amounts of wealth.

How can disposable income go up?

For example, through an increase of interest rates.

An Increase?

Yes, this is very important! Because capital is so cheap! People always think labor in China is so cheap. But people usually ignore the fact that capital is even cheaper! The speed of capital deepening in China has been very high in the most recent decade and China ended up using too much capital and too little labor. In other words, we have been substituting labour with capital. That is a problem because cheap money suppresses the wages. In order to correct this, interest rates need to go up.

In addition to lowering household income by repressing wages, low interest rates also lower household income directly by repressing household earnings from bank deposits. According to my calculation, the average real interest rate during 1979-2008 was 0.07% for 1-year time deposit and 1.80% for a 1-year loan. The real earnings of Chinese households from bank deposits was -900 billion Yuan during 2004-2008, including -500 billion Yuan during 2008.

The loss of potential household income due to repressed wage and reduced employment should be much bigger than that due to repressed interest rates. Repressed interest rates also induced over-investment in real estate, fuelling bubbles and crowding out consumption.

All these things explain why the Chinese households do not have enough to consume.

Generally, China is facing the prob-

“The outside world became too small to absorb all “made in China” goods.”

lem of “financial repression” which is basically when capital is artificially made cheap. The solution to this problem is market-oriented reform. In the past three decades, we saw market-oriented reform in various fields of the Chinese economy but not much in the financial market where we still see too many regulations and government interventions. The imbalance of the Chinese economy was mainly caused by financial repression.

There is rising competition from countries like Indonesia, Vietnam, India or Cambodia. Your recommendation for China?

Well, China apparently has to move up the value chain and produce higher value added products. The structure of China's exports will change. Export volumes will grow slower than GDP. But the added value content of exports will grow faster than GDP.

Let's have a look at the global picture. The world sees possibly the biggest economic crisis ever, and a China which is coping well with the crisis. What does China do better than others?

There are many reasons. For example we don't spend tomorrow's money. We have enough savings as well as enough foreign exchange. The basic economic situation is stable with a low inflation. Of course there were also some bubbles. But they already burst, such as the real estate and stock market bubble. Despite recent early signs of potentially new bubbles, the situation is still under control.

But the main reason why China is still doing quite well, I see in the fact that China's economy is highly heterogeneous. It is very important to see that China is a huge economy that internally differs a lot. The global economic crisis has, of course, also a negative impact on China. But the impact only affects

parts of China and not the whole country! Coastal export-oriented regions are hit hard. But interior regions do not depend on exports. So if you look at growth rates in provinces of the inland, you see they grow much faster than coastal regions. So China's heterogeneousness allows the country to cope better with the crisis whereas developed countries with homogeneous economies suffer more.

However, the fact that China is coping well with the crisis does not mean China's current growth model is sustainable. If China does not push forward market-oriented reform, it will simply delay a big crisis into the future.

So China's huge regional disparities are an advantage?

Not an advantage. But the disparities clearly also have their good sides.

Will the fastest growing regions continue to be in the interior of China?

I believe so, yes. Supported by the stimulus package which mainly focuses on the interior of China. Also, the burst of the real estate bubble in coastal areas only had a very limited impact on the interior. The urbanisation process in the interior has only just started.

Money is cheap in China. How likely is a credit bubble similar to the US?

It is simple. Of course we have excess liquidity. But we don't have this high leverage like other countries. All these fancy innovative financial instruments as well as a subprime market simply do not exist in China. And this makes a big difference!

The underdeveloped financial sector of China is a plus?

Yes, for the time being, it definitely helps when it comes to crisis prevention of credit bubbles. But don't get me wrong - I am not saying the financial market should not be developed. But China's huge savings, huge foreign exchange reserves help to defend China from external shocks. But in this sense, the Chinese economy is over-insured. And this comes at a very high cost! I am convinced we have to push forward market-oriented reform and further open the financial markets. The reforms should not come to a halt because of the global crisis. Western market economies are not perfect;

and we should not copy everything – but that's the direction to go for China.

When will the effects of the stimulus package taper off?

It's a two year package. So probably by late 2010 or early 2011 the short term effects will become weaker.

How did the crisis change the general economic blueprint of the country?

In China, the government tries to plan everything on a long-term basis. In this perspective, the impacts of the crisis are rather limited. But I see a rising protectionism in Western countries, and some people in China still believe that the West will start importing from China as they used to do. I think these expectations are unrealistic.

Because of rising protectionism towards Chinese goods?

Yes. And because the outside world is just no longer big enough to absorb all "made in China" goods.

Will the RMB be freely convertible one day?

One day, yes (smiling).

Can you put a timeframe on it?

Sometime around 2020 could be realistic I think. It will result in an improved efficiency of the Chinese financial system.

What is China's biggest challenge in terms of economic policy?

It's the fact that we have a wrong policy of financial repression. The various distortions of the financial market in China: the fact that interest rates are repressed, the fact that Chinese people cannot invest overseas to seek higher returns, that enterprises are not allowed to issue bonds to raise capital, the fact that savings are mainly channelled through China's State-dominant financial system which controls most of the savings and investments in China, the fact that big enterprises have easy access to financial resources but small ones do not - all these are symptoms of financial repression, which - and this is what I criticize the most - in the end all slow down the processes of job creation, efficiency enhancement and consumption expansion in China! After thirty years of fastest economic growth and also three decades of the most stringent birth control policy the world has ever seen, the problem of unemployment still cannot be solved in China. That is very unfortunate.

Jianmao Wang

Prof. Jianmao Wang is Professor of Economics and former Associate Dean at CEIBS. Prof. Wang received his PhD in Economics from the University of Florida, USA. He holds an MSc in Information Sciences from the Institute of Scientific and Technical Information of Shanghai, and a bachelor's degree in Physics from Sun Yat-sen University. His research is focused on Chinese economic reform and development, international technology diffusion, management education and price discrimination. His work has appeared in the Canadian Journal of Economics, Harvard Business Review, Far Eastern Economic Review, Shanghai Management Science, and the Journal of Economic Integration. He is co-editor of the CEIBS Case Book Series and translator of Prof. Jinglian Wu's book "Understanding and Interpreting Chinese Economic Reform". He was also a country expert for the project "China and the World: Scenarios to 2025" of the World Economic Forum and attended the Annual Meeting of the World Economic Forum in Davos in 2006.

Donations still needed— Help us to finalise the school project in Sichuan

Swiss Community Project
Reconstruction in Sichuan: School & Housing Sponsorship Project



On May 20, 2009 the groundbreaking Ceremony of the school took place and the construction work of the school has started. The new kindergartens design is inspired by a traditional Chinese garden. A dragon-shaped covered corridor is additionally used to create a feeling of learning and exploring inside the school.

With an area of 6,500 square meters, the school can host over 300 students and will be suitable and accessible for disabled children too.

We are still looking for individuals and organisations to join in and assist 'The Swiss Business Community Reconstruction Project'. Funding and non-financial resources are greatly welcomed to help the community of Long Xing Town to reconstruct their schools and homes.

Donations still welcome!

For more information please visit: www.swisscham.org/sha/news/sichuan.php

If you would like to make a donation or have further enquiries, please contact
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“资本比劳动力更便宜”

区域不平衡有助于应对危机。——王建翎

访谈：方必安



王建翎：出口在中国GDP中的占比将会下降。

王建翎先生，您认为目前中国经济的恢复是可持续的吗？

目前的主要思路是很清晰的：根据我的研究，未来中国经济的可持续性增长水平，也就是所说的增长态势，将在9%左右，这其实也是我们目前的增长水平。同时它也暗示了最近几年中国经济增长太快了，比如2007年经济增速达到了13%。

为什么快速增长对中国不好呢？

主要有两个原因：经济泡沫和产能过剩。按照中国目前的增长模式，过高投资带动高速增长的同时，也带来了产能过剩。

最近中国经历了出口需求大幅下滑，未来出口在中国经济增长中的将占据什么样的地位呢？

我相信出口在GDP中的占比将会下降。

为什么？

主要是因为目前的中国经济所具有的产能已经太大，国外市场已经消化不了这些过剩的产能了，中国想把这些过剩产能出口出去也不像以前那么容易了。

那么未来中国经济增长将由什么拉动呢？

内部需求。

如何来扩大内需呢？

要提高个人消费水平，需要提高人们的收入水平。不过我想先澄清的一点是：内需包括个人消费、公共消费和投资。因此，中国目前过高水平的投资也属于内需。另一方面，中国的个人消费水平与发达国家相比很低，过去几年的个人消费只占到35%，而我们的理想状态是个人消费占到GDP的50%。我们当前面临的挑战就是要让人们多消费，就必须提高人们的收入水平。但在1979-2008的30年里，其中有23年中国的家庭人均可支配收入的增长速度远低于人均GDP的增长速度。这是一个很大的问题。

中国的储蓄率也很高，这也是一个问题吗？

我认为目前的家庭储蓄率还可以，大概与印度的家庭储蓄率持平。你所说的高储蓄率主要是公司储蓄，尤其是国有企业和政府储蓄。近年来中国的家庭储蓄率并没有很大的增长，但是公司储蓄率却大幅上涨，政府储蓄率上涨略低于公司储蓄率。政府和国有企业积聚了大量的

财富，这才是问题的所在。

如何提高人们的可支配收入呢？

比如，可以通过提高利率的方法。

提高利率？

是的，其实这一点是很重要的！因为资本很便宜！人们总是认为中国的人力很便宜，但是人们往往忽略了资本更便宜的事实！中国资本深化的速度很快，而且目前中国使用大量的资本，少量的劳动力。换一种说法就是我们正在使用资本替代劳动力。这里的问题就是便宜的资本抑制工资的上涨。为了纠正这一问题，就必须提高利率。

除了压低工资水平降低家庭收入外，低利率水平也可以通过减少家庭银行储蓄收入的方法直接减少家庭收入。根据我的计算，1979-2008年一年存期的实际平均利率水平只有0.07%，而一年贷期的实际平均利率水平为1.8%。在2004-2008年间，中国家庭银行存款的实际利息收入是-9000亿元，包括2008年的-5000亿元。

由于压低工资和减少就业人数带来的潜在

“国外市场 已经不能消化 所有“中国制造” 的产品了。”

家庭收入损失比来自压低利率带来的损失还要大。低利率还会引致房地产投资过热、刺激泡沫产生和排挤消费。

这些都解释了为什么中国家庭的消费力不足。

总的来说，中国现在面临的问题是“金融压制”，就是人为压低资本的价值。这个问题的解决方法是以市场为导向的改革。在过去30年里，中国的许多领域都进行了以市场为导向的改革，但是资本市场却仍然有太多束缚和政府干预。中国经济的不平衡主要就是由金融压制导致的。

最近来自印度尼西亚、越南、印度和柬埔寨的竞争日益激烈，您对中国有什么样的建议呢？

很显然中国应该向价值链的上游转移，生产具有高附加值的产品。中国的出口结构也将发生变化，出口量增长将慢于GDP增长，但是高附加值产品的出口增长将远远快于GDP增长。

我们再来看一下全球的情况。我们正经历可能是有史以来最严重的经济危机，而中国在应对危机中表现十分出色。为什么中国在应对危机方面比其他国家做的更好呢？

有许多方面的原因，如中国人没有超前消费的习惯。我们拥有足够的储蓄和外汇储备，经济基本面保持稳定，通货膨胀率较低。当然中国经济中也存在一些泡沫，但是就像中国的房地产和股市泡沫一样，这些泡沫已经破灭。尽管近期较早的出现了一些新泡沫症状，目前的局势仍在控制之中。

但是我认为中国经济到目前为止仍然保持不错的势头的主要原因是中国经济的高度不平衡。注意到中国是一个很大的经济体并且内部存在很大的不同是很重要的。全球经济危机也给中国带来了消极的影响，但是这种影响仅仅涉及到中国的一部分地区，而非整个中国！沿海以出口为导向的地区受到的冲击较大，而内陆经济并不依靠出口，因此如果看一下内陆省份的增长率的话就会发现它们比沿海地区增长快得多。因此中国的不平衡增长使中国能够很好的应对危机，而较均衡发展的发达经济却受到了危机的巨大冲击。

虽然中国在应对危机上做的很好，但这并不表示中国目前的增长模式是可持续性的。如果中

国不推进以市场为导向的改革的话，只会为中国未来埋伏更深的危机。

就是说中国存在着巨大的地区不平衡是一种优势？

不是一种优势，而是不平衡具有好的一面。

那么今后中国增长最快的地区仍将是内陆地区吗？

我相信是这样的。中国的经济刺激计划主要是针对内陆地区的，另外，沿海地区的房地产泡沫的破灭对内陆经济的影响有限。内陆地区的城市化进程才刚刚开始。

中国的资本很便宜，那中国的信用泡沫与美国有怎样的相似之处呢？

这个很简单。我们也有流动性过剩，但是与其他国家不同的是我们的放贷的力度没有那么大，其他国家的创新性金融工具以及次贷市场在中国根本就不存在，这是很大的不同之处！

中国不太发达的金融领域是另一个方面吗？

是的。从目前来看它有助于防止信用泡沫危机，不过我并不是说我们不应该发展资本市场，而是中国巨大的储蓄和外汇储备有助于抵御来自外部的冲击。但在这一方面，中国经济有点过于保守了，这也带来了很大的成本！我相信中国应该进一步推进以市场为导向的改革和开放资本市场，不能因为金融危机而停止这方面的努力。西方的市场经济并不是完美的，我们不应该完全拷贝西方的模式——但这却是中国今后的发展方向。

中国经济刺激计划的效应能持续到什么时候呢？

这是一个两年的刺激计划，因此差不多到2010年底或2011年初的时候短期的刺激效应将会慢慢减弱。

经济危机有没有改变中国整体经济发展的蓝图呢？

中国的一切计划都是基于一个很长的时期。从这一点上来看，经济危机的影响是很有限的。不过我发现最近西方国家保护主义抬头，一些人仍然认为西方国家会向以前一样继续进口中

国的产品。我认为这种期望是不切实际的。

因为保护主义抬头吗？

是的。同时也因为国外市场已经不能消化所有“中国制造”的产品了。

有一天人民币可以自由兑换吗？

有一天会的(笑)。

有没有时间表呢？

我想在2020年左右应该可以实现，这也将使中国的金融体系变得更有效。

中国在经济政策方面面临的最大的挑战是什么？

是我们目前的金融压制政策。目前中国资本市场中存在的各种扭曲现象：利率被人为压低，人们不可以向海外投资以获得更高的回报，公司不可以发行债券以募集资金，储蓄流入由控制着大部分储蓄和投资的政府主导的金融体系中，大型企业很容易获得贷款而中小企业很难获得贷款，这些都是金融压制的症状——也是我严厉批判的一些最终将减缓就业机会的创造过程，减缓效率的提高以及消费扩张！在30年的快速经济增长和严格的计划生育政策后，中国的失业问题仍未得到很好的解决，这是很不幸的。

王建柳

王建柳教授是中欧国际工商学院(CEIBS)的经济学教授和前任教务长。王教授在美国佛罗里达大学获得经济学博士学位并拥有上海科技情报研究所科技情报学硕士学位以及中山大学物理学学士学位。他的研究侧重于中国经济改革与发展，国际技术传播，管理教育和价格歧视。他的成果曾发表于《加拿大经济学期刊》、《哈佛商业评论》、《远东经济评论》、《上海管理科学》和《经济一体化期刊》。他也是中欧案例丛书的主编以及吴敬琏教授的著作《当代中国经济改革》的英文版译者。他作为国情专家参与世界经济论坛的“中国与世界：二零二五年情景预测”项目研究并出席在瑞士达沃斯召开的世界经济论坛2006年年会。

Positioned to Ride Out

Latest Swiss presence data in the Yangtze Delta Region

By Stella Nie, Head of Economic Section Consulate General of Switzerland in Shanghai



CAUTIOUS OPTIMISM:

China's broadened recovery after the stimulus measures as the "single-gear" drive

It is with little dispute that China's economy has found a bottom and will achieve its 8% growth goal for 2009. Though, there are still questions if the rebound will develop into sustainable recovery, especially if the government adopts "exit strategy" in fear of inflation after its ultra-loose monetary policy. The economy reported 7.1% expansion for the 1st half of 2009 and accelerated to an 8.9% growth in the 3rd quarter, which made a 7.7% increase for the first nine months. Investment has outshined other contributors with 7.3% share, while consumption put 4% and net exports contributed 3.6%.

The recovery was mostly driven by the government's aggressive stimulus measures (as part of its efforts to cope with the global financial crisis, last November Chinese central government launched a four-trillion-Yuan (about USD 586 billion) stimulus package), which includes partly tax breaks, big infrastructure funding and mostly bank lending. The new bank loans for the first half of 2009 recorded RMB 7.7 trillion and added to RMB 8.67 trillion in the 3rd quarter, well exceeding the government RMB 5 trillion full year target set at the beginning of the year.

Surpassing Germany

Thanks to the aggressive stimulus package and easy monetary policy, China might be the first major economy that goes out of the world downturn. Based on its outstanding economic growth in the recent years and rapid recovery, it is now the world's largest exporter, surpassing Germany and the largest market for vehicles, surpassing America.

However, imbalance still remains that might hurt further economic growth. As the "world-factory", China's export was heavily hit by the financial crisis that resulted in the slump of the external demand. Huge government-guided investment has offset the impact of the gloomy exports, but private consumption didn't react and show clear sign of picking-up. As a matter of fact, the level of contribution of the consumption to GDP declined compared with 10 years ago. On the other hand, the dramatic increases in bank lending and money supply pushed the rise in property and equity markets, which raised again fears that government policies are creating a series of bubbles and aggravating over-capacity in the economy.

Higher exposure to external shocks

The global downturn and the steep decline in foreign demand led to a reshape in the growth rate ranking at China's economic map this year. It is not difficult to understand that the export-reliant regions, mainly the Yangtze Delta Region (YDR) and Pearl Delta Region (PDR), have higher exposure to external recession and reported weaker performance compared with the catching up central and western provinces. Yet, the reshuffle in the ranking is still surprising.

	1 st Quarter	1 st Half	3 rd Quarter
China	6.1	7.1	8.9
Shanghai	3.1	5.6	7.1
Jiangsu	10.2	11.2	11.7
Zhejiang	3.4	6.3	7.7
Anhui	11.6	11.8	12.9
Guandong	5.8	7.1	8.6

Table 1: Comparison of Economic Growth Rate in 2009

The 1st half year numbers showed 5.6% GDP growth rate in Shanghai and 6.3% in Zhejiang, ranking these areas third lowest and fifth lowest among China's major administrative regions in terms of economic growth. Five areas' GDP fell below the national average of 7.1%, namely Shanghai, Zhejiang, the major exporters in the YDR, and Xinjiang, Gansu, Ningxia, the least developed remote western areas. As China's biggest business city and the dragon head of the Yangtze Delta Region, Shanghai reported its lowest growth since 1992, and it is the 2nd time after 2008 that the city performed a under double-digit growth. The fresh 3rd quarter showed the economies in the coastal regions have picked up pace, but still lagged below the national average.

The biggest problem for the coastal regions is the sluggish external demand. The falloff in exports was about 20% in Shanghai and Zhejiang, compared with a nearly 25% decline in Jiangsu and an 18.6% decline in Guangdong Province. Among the areas, Shanghai records the highest dependency ratio on foreign trade (around 170%), which is not only higher than the national level, but also above the level of Guangdong (150%) and Jiangsu (120%).

On the other hand, the central government is trying to maintain the economy's growth by extending huge fiscal stimulus to projects such as railways, airports, highways and bridges. The huge infrastructure investment mostly went into the poorer central and western regions, which were legged behind in the past 30-year reform. The crisis provided an opportunity for the region to receive central government's fund aid and narrow the gap with the more developed coastal region. Take Shanghai, for instance, the fixed assets investment grew at nearly zero percentage (1.7%) in the first quarter, in a stark contrast with the 34.3% growth in the provinces of Central China.

Each one's way out

The coastal regions, therefore, would have to strive for their own way out and be more creative in evolving a future business model to maintain its position as the country's powerhouse.

1.As an emerging world city, Shanghai has been leading

China's economic growth. In recent years, the city has been endeavouring to upgrade its industry and boost the service sector, but the industry sector remains too export-oriented and it would take time for reform to take place in the manufacturing structure. The service sector is now taking 60% share of the GDP, but achieved with a deep fall of the exports. The export decline was led by products in labour-intensive industries such as clothing, shoes and furniture, reflecting the higher costs of production in the city.

Staring 2nd quarter of 2009, the city accelerated the preparation for the World Expo 2010, the 184-day exposition that expects 70 million visitors, and thus shows signs of Expo-led growth. Shanghai's economy consolidated steady growth in August with resilient retail sales and infrastructure spending. With about 6'000 construction sites spreading all over, the city has poured RMB 18 billion in the construction of the urban rail system and an overall city face-lifting project. It is estimated that the Expo will boost the city's GDP by 2% point for seven years. Its industrial production expanded for the third straight month in August despite of persistent gloomy exports. Before June, the indicator of Shanghai's manufacturing fell for seven consecutive months. The steady growth signalled the resilience of the city's economy and a quick recovery on road.

Speed up pace of industry restructuring

The biggest advantage the city would take from the downturn is that Shanghai is urged to quicken its pace of industry restructuring. The city's goal of becoming international financial centre and shipping hub has gained its momentum with the State Council's approval and support. With the completion of the 3rd phase project, Yangshan Deep-water Port now has 16 berths for container ships and is capable of handling 9.3 million 20-foot equivalent units per year.

The city is also preparing for the post-Expo development. Shanghai will exploit its Hongqiao transportation hub as the core of a massive new power centre that serves as the city's gateway to the Yangtze River Delta region and beyond. Hongqiao area will become Shanghai's third "urban circle," after the central business district covering both sides of the Huangpu River and the manufacturing and shipping zones in Pudong's outlying reaches. The area will try to attract modern service and manufacturing sector as well as regional headquarter.

2.Despite of a steep decline in exports and imports, Jiangsu's economic growth in the first half of 2009 brightened the haze in the YDR, with a rate 4.1% higher than the national average. Infrastructure spending and rural development has been the key to the recovery. The southern part of the province, especially the city of Suzhou and Wuxi, has been favourable choice for foreign investment due to its proximity to Shanghai and solid industry base. But the central and northern part of Jiangsu is historically less developed.

The central government has announced recently a plan to boost the coastal region of northern Jiangsu, which abounds in land reserves and mud flat, to build the region into a traffic hub, a coastal industrial base, as well as potential development zones. Among the first two phases of the RMB 4-trillion stimulus package, Jiangsu has secured RMB 5 billion investment. According to the provincial government, the province plans to put all together RMB 300 billion government-guided investment

by the end of 2009, to trigger RMB 1.2 trillion investments from all sectors.

3. Zhejiang's economy is characterized by a heavy reliance on private initiatives and non-interventionist government style. As the province is not abundant in resources and industry base, the private companies chose to focus on light industries like textile and garment and mainly for the external markets. The pillar export sector is the hardest hit one and dragged down the province's economy growth. Furthermore, the private entrepreneurs in the province tend to turn to capital market or other part of China for investment after accumulation the first barrel of gold. The Province is working on improving the business environment to keep its local business people.

On the other side, the private economy in Zhejiang is quite active. The entrepreneur sensitivity and agility have already helped the private enterprises to tap the domestic market. The province performed better in the 2nd quarter already.

4. Last but not least, Anhui Province, which is the least developed area in the Consular region and has been trying to join the pan-YDR club, has become an uprising star, aided by the country's stimulus plan. The province reported a 11.8% growth rate for the 1st half of 2009 while its capital city, Hefei's GDP grew at a campground annual growth rate of 34% from 2003 to 2007, and 17% in 2008, 16% for the first six months of 2009. With easy access to highway and railway network, to nearby ports and airport (and more ongoing infrastructure projects), abundant human resource with 59 universities, as well as low labour cost, the city has attracted more than dozen multinationals and many Chinese companies to locate their

manufacturing bases there.

Sino-Swiss trade: negative growth rate

Affected by the global meltdown, the Sino-Swiss trade for the first time reported a negative growth rate, with imports from Switzerland shrinking 13% and exports to Switzerland down 32.7%. As a result, Switzerland still enjoys a trade surplus at the amount of USD1'746 million, which is higher than the amount of USD 1'586 during the same period of last year. In the YDR, trade surplus with Shanghai again contributed almost half of the total, while Zhejiang exported more to Switzerland and Jiangsu imported a bit more. Due to the relatively small amount of base last year, the decline in trade with Zhejiang and Anhui is rather moderate.

Amid global uncertainty and a changing economic landscape, Swiss investment slowed down in the YDR for the first half year, with only 9 newly invested projects, compared with 31 from the same period in 2008. But the trend is coming back in the 2nd half, lured by the huge market potential and the viability of the private consumption. Expansion and re-investment in the region is not only for the cheap manufacturing advantage, but start also to include China and the YDR into its global strategy. Business confidence has been reinforced, when eyeing the downturn as an opportunity to optimize the operation structure and gain market share from the weakened competitors, and especially, in wait for a consolidated recovery.

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The Croissant King

Success comes with passion, says Gerard Dubois of La Rose Noire

Interview, Fabian Gull, Hong Kong



CREDO. "I am not in a discount business", says pastry and bakery passionate Gerard Dubois.

18th CEO Interview
 总裁访谈录
Mr. Gerard Dubois
 CEO of La Rose Noire

Gerard Dubois, you were introduced to me as the "Gipelikönig" of Hong Kong.

I have two objections: Firstly, I don't like to call it Gipfeli, which is a Swiss German expression. I do French croissants! My croissants have much more layers and are much more flaky. Secondly, I do so many more products than just croissants!

How many croissants has La Rose Noire ever produced?

Over 20 millions....not bad (smiling).

Bread, croissants, Danish pastry, muffins, scones, chocolate and tart shells are your business. How did it all get started?

With an apprenticeship in a bakery in Villars, Switzerland. After that, I had the choice of working in a small village or travelling the world. I went for the latter.

Your first stop was Zurich.

Right. At Confiserie Künzli. Not the very best of my times. The Swiss Germans

were really tough with guys from the French speaking part of Switzerland like me and my boss used to yell at me a lot saying "Du Welsche Löl!" which means "no-hoper from the French part of the country" (laughing)!

Then I moved to London where I kick-started my career with Hilton. Without a word of English. I did a lot of sugar and chocolate displays, I got promoted right away and after one year my superior told me: "The Hilton group is looking for pastry chefs around the world. Are you willing to move?" Of course I was.

So I ended up in Guam, this wonderful Pacific paradise, where I worked for two years as a pastry chef at a 700 room hotel complex. What a great time! I did my private pilot licence, lots of scuba diving and wind surfing. Next stops were Nagoya (Japan) and Hilton Shanghai, where I had been transferred to for the opening in 1986. They kept promoting me all the time, so another two years

later, I arrived as "Area Pastry Chef" in Hong Kong being in charge of ten hotels in Asia. More importantly, I met my wife right away upon arrival in Hong Kong (smiling).

What made you want to open up your own business?

Well, I felt very comfortable about it. Hong Kong is a great city, the people are lovely - probably Asia's best. I have been opening so many Hiltons already so it was sort of natural to start my own business. But first I had to convince my fiancée. I said: "Listen darling, we get engaged and if everything goes right we get married. If not, we get married and go back to the hotel business".

What a convenient worst case scenario. You must have been very convincing.

Indeed (laughing). So in 1991 I started with "La Rose Noire" and my first cake shop and restaurant in Hong Kong. A second restaurant followed shortly after, then a third one, another cake shop,



PEOPLE BUSINESS: "Hong Kong is a great city, the people are lovely - probably Asia's best".

and so on. I did the whole line – bakery, sandwiches and pastry. I started to sell to hotels, airlines, supermarkets. In 1997, with the Asian crisis, I bought out my partner, and decided to start closing down restaurants slowly.

Why?

It was just a headache to me and a no family life. I was working when everybody else was partying.

In 2002, you did a first attempt to enter the Mainland Chinese market.

Correct. But at that time, you needed to have a local partner - which I didn't want to have. In 2004, the regulations changed with the accession of China to the WTO. So I started a WOFE in China. With no local partners. I set up a representative office in Shanghai and spent a hell of a time collecting money from my clients. That was really frustrating. So I decided to solely work with distributors to free myself from this burden. Today, my distributors represent La Rose Noire, do the billing, placement of orders, manage the warehouses and deliver to more than 40 hotel customers in Shanghai and to a similar amount of customers in Beijing. What a relief!

How important is China for La Rose Noire?

Some two years ago, 70% of my sales from the Dongguan factory were in China, excluding HK. Today, 72% of my

total sales go overseas.

This is a drastic shift. Was it intentionally?

Very much intentionally! Doing business in China is of course tempting because of its size and the possibilities - but also exhausting. Over the years, I got tired and the red tape knocked my socks off. Hong Kong and Mainland China are still unique and excellent production locations to La Rose Noire. But our products predominantly go overseas. Despite that we still grow in China, China becomes relatively less important for the company as a whole.

What else were you struggling with in China?

The discount mentality. I experienced doing business in China - to a large extent - as just negotiating for discounts. But I am not in a discount business! China is a very challenging market but I prefer to expand elsewhere.

Customers are also asking for discounts elsewhere than China I guess?

Sure. But I handle it strictly. There is no discount – but customers choose what they want! Let me give you an example. I recently presented a potential client three quality and price levels of croissants that we have on offer. And I marked it as "La Rose Noire Quality", as "Lower La Rose Noire Quality" and as "Even Lower La Rose Noire Quality". The price changes according to the

percentage of French butter in croissants which can be 48%, 38% or 28%. But the discussion we had was all about getting the best quality at a cheaper rate! This is not how I do business! If a client wants to spend less he can opt for a cheaper product line.

Did he become your customer?

He did (smiling). Those who are after discounts usually just don't come to me.

What else than a no discount policy is part of your business philosophy?

For example, I never sell to anybody who has not visited our factories, my people and seen our products. I want them to see who we are and what we are doing. I have many sales requests from people I don't know on email. But I am not interested.

Why?

Because what I do is my passion and I want to share it with my clients! Also, customers get more attached and involved this way. It's a long term thing. But I also do it the other way round! I don't sell to anybody. I want to see their frozen warehouses, their frozen trucks and I want to meet their sales people before we actually do business.

Where do your exports go?

Five years ago I started to sell frozen and dry products to New Zealand, Thailand, Indonesia, India, and Dubai. Now, we also sell to Europe and the US. We



MY WEAKNESS: "Too sales driven and overly pushy sometimes".

run a 24 by 7 production which has never come to a halt in fourteen years.

What are the regional turnover contributions?

I hate to talk about numbers! I am just passionate! I am passionate about my products and about quality. If I get this message across, both internally and vis a vis customers, I don't need to worry about the figures. Success comes as a result of passion!

Just to give me a rough idea.

Ok. 35% to the US, 25% in Dubai, China is today at around 28%. The rest is Asia Pacific and Europe which is getting stronger and stronger. 60% of my business is bread, croissants and danish. Cakes and chocolate pastry is maybe 35% of the turnover.

How much are you involved in the development of new products?

99%. This is my thing.

I see screens on your desk with images from surveillance cameras. Are you a control freak?

Totally not! I rarely look at these screens. But before we had the cams installed, we had an incident a couple of years ago when an employee dropped a spoon in a new machine that was producing 10,000 mini rolls per hour - which caused a costly breakage of the machine and nobody accepted responsibility. Since we have the CCTV cameras, nothing alike ever happened again.

How would you describe your management style?

Entrusting my people.

How about your weaknesses?

Too sales driven and overly pushy sometimes (laughing).

Your biggest mistake? What would you do differently today?

I may sound arrogant. But nothing.

How do you keep your shape being constantly surrounded by goodies?

I do one hour gym every day. At least I try.

What takes most of the time in a day?

Customer visits and product development. Every year I want to come out with a brand new creation.

Any difficulties in finding suitable talents?

No, because I found them already and they stay with me. All senior staff have been with me for many years. Besides, I do not employ a single university graduate with an MBA or alike. All my people started from scratch, got more experience over time and got promoted step by step.

How profitable is La Rose Noire?

Pastry and bread are low margin businesses. I started doing business in Mainland China five years ago and made money for the first time this year. I started in Hong Kong 18 years ago. During the first ten years I did not really make big money. Of course the costs were covered and we were making profit.

But on a modest level. The recent years became more interesting because our machines have depreciated and the expansion was and is in full swing. So one can do well in the pastry business but the real money in Hong Kong you do with properties (smiling).

Gerard Dubois

Gerard Dubois, at a golden age of 47, is a trained pastry chef and the founder and owner of La Rose Noire in Hong Kong, a producer of fine bakery and pastry products. After his apprenticeship in Switzerland, the desire to travel the world brought him to London, then to the Pacific island of Guam, to Nagoya and Shanghai – always as a pastry chef for the Hilton group. In 1991, the former ice hockey player of the Swiss national team decided to start his own business in Hong Kong. After having successfully seduced the demanding and snooty Hong Kong crowd with his sweet and savoury delights, he rapidly expanded in Mainland China, where he set up a second production site in Dongguan (South China) to complement the production in Kowloon. La Rose Noire employs a total of around 600 staff members and exports from China to the global markets - mainly to hotels, airlines, restaurants and retailers. Gerard is also the author of three pastry books and a passionate sports man. He is married, has two children, a four wheeled "mistress" in British racing green, and lives in Hong Kong.

羊角面包大王

成功源自于激情。——香港黑玫瑰(La Rose Noire)公司总裁Gerard Dubois

访谈：方必安



对西饼充满热情的Gerard Dubois
说：“我从不做打折生意”

18th CEO Interview
总裁访谈录
Mr. Gerard Dubois
CEO of La Rose Noire

Gerard Dubois，朋友介绍你的时候说你是香港的“羊角面包大王”(Gipelikönig)。

我反对。首先，我不喜欢Gipfeli(羊角面包)这种瑞士德语的表达方法，因为我做的是法式的羊角面包！我做的羊角面包层次更多更薄。另外，我除了生产羊角面包还生产很多其他的产品！

迄今为止，La Rose Noire已经生产了多少个羊角面包了？

差不多有2000万个，我觉得还不错(笑)。

你生产的产品包括面包、羊角面包、丹麦酥皮甜饼、起酥蛋糕、司康饼、巧克力和挞皮等。你是怎么开始你的事业的？

在瑞士维拉斯结束见习后，我必须在留在小镇工作和到世界各地旅行间作出选择，最后我选择了后者。

你的第一站是苏黎世。

是的，在Confiserie Künzli工作。那个时候的日子并不好过，瑞士德语区的人对我这样来自法语区的人十分严厉，我的老板曾对我大吼说我是“Du Welsche Löli”，就是“来自法语区无望的人”(笑)！

随后我就搬到了伦敦，开始在希尔顿集团供职。我主要负责制作糖果和巧克力，并很快得到了提升。一年后，我的上司跟我说：“希尔顿集团在世界范围内都需要西饼厨师，你愿不愿意搬到其他地方去工作？”答案是我当然愿意。

然后我就到了关岛这个位于太平洋上的美丽天堂，希尔顿集团在那里拥有一家共有700间房间的酒店，我在那里工作了两年。那段时光很难忘！我考取了私人飞行员驾照，并经常去潜水和冲浪。1986年，我又先后去了名古屋(日本)和上海，以协助希尔顿集团在当地的发展，这期间我不断获得升职。两年后，我来到香港并成为主管亚洲10家酒店的“亚洲区西饼厨师长”。最重要的一点是，我一到香港就遇到了我现在的太太(笑)。

你为什么想创立自己的事业呢？

我觉得这样很好。香港是一个伟大的城市，这里云集着亚洲最优秀的人才。因为我已经帮助希尔顿集团在几个城市开立新店，所以创立我自己的事业也是一件很理所当然的事情。不过首先我得说服我的未婚妻，我对她说：“亲爱的，我们已经订婚了，所以如果我的事业进展的顺利，我们就结婚；如果不顺利，我们结婚然后我再回到酒店工作。”

这真是做了最坏的打算啊。你当时一定很有说服力吧。

是的(笑)。1991年，我在香港创立了“La Rose Noire”以及我的第一间蛋糕店和餐厅，不久我就开了第二家、第三家、第四家……我的产品很广泛，包括面包、三明治和西饼，主要提供给酒店、航空公司和超市。1997年亚洲金融危机期间，我买断了我的合伙人的股份，并决定慢慢关掉餐厅的生意。

为什么呢？

经营餐厅很让人头疼，而且我不得不减少跟家人在一起的时间，在别人玩乐的时候，我却还在工作。

2002年，你首次尝试进入中国大陆市场。

是的。不过那个时候的规定是外国人进入内地市场必须找一个当地人合伙——可是我不想与其他人合伙。2004年，加入WTO后的中国改变了这些规定，我也得以注册为外商投资企业，并在上海设立办事处。进入大陆市场后，我度过了一段向客户催款的艰难而沮丧日子，为了摆脱这一负担，我决定只跟零售商合作。现在，我的零售商代表La Rose Noire收款、下订单、管理库存并将产品运至上海和北京各40多家酒店。我现在感觉真轻松啊！

对于La Rose Noire来说，中国市场的重要有多大？

大概两年前，我在东莞工厂70%的销售额来自中国市场(不包括香港)，而现在，72%的销售额来自海外市场。

这是相当大的转变，你是有意这样做的吗？

是的！在中国做生意当然很吸引人，因为这里的市场很大而且有很多机会，可是同样也是很消耗精力的。这些年来，很多官方的规定让我筋疲力尽。香港和中国大陆对于La Rose Noire来说是独一无二的生产场所，不过我们的产品大多还是卖到国外。尽管我们在中国的业务不



我的弱点：“太强的销售欲望和过于急躁”

La Rose Noire

断增长，但是在整个公司的营业额中中国所占的份额并不是很大。

除了许多规定外，在中国你还有其他什么要应付的呢？

折扣心理！我的经验是在中国做生意很大程度上就是在谈折扣，但是我的生意并不是一个可以给折扣的生意！中国是一个很具挑战性的市场，但是我还是倾向于开发其他市场。

我想除了中国外，其他国家的顾客也在寻求折扣？

是这样的，不过我还是很严格的控制折扣。我的产品没有折扣，顾客可以自由选择买或不买！我来举个例子，我们最近给一个潜在的客户提供了三种不同质量和价格水平的羊角面包，分别为“La Rose Noire质量”、“La Rose Noire低质量”和“La Rose Noire更低质量”，价格随着羊角面包里的法国黄油含量分别48%、38%和28%而不同，但是我们的谈判最后成了用最低的价格买最好的产品！这不是我做生意的方法！如果顾客想少花钱，那大可以选择较便宜的产品。

他最后有没有成为你的客户？

成了(笑)。那些只追求折扣的客户一般不会来找我的。

你的经营哲学除了没有折扣外，还有什么其他什么？

比如，我从不把产品卖给那些没有参观过我的工厂、见过我的员工和看过我的产品的客户。我想让客户了解我们和我们的产品，我的电子邮箱里有许多销售需求，可是我不感兴趣。

为什么？

因为我做的是具有激情的事业，我希望与客户分享我的激情！此外，这样还可以使客户与我们的联系更紧密，有利于建立长期合作。不过有的时候我也会反过来，比如在与客户合作之前，我要先看他们的冷冻室、冷冻车和销售人员等。

你的产品大多出口到哪些国家呢？

5年前主要出口到新西兰、泰国、印度尼西亚

亚、印度和迪拜，现在又扩展到了欧洲和美国。我们的生产14年来一直是每周7天、每天24小时不间断。

不同地区对你们公司收入的贡献比例分别是多大？

我不喜欢讲数字！我要的是激情！我对我的产品和产品质量充满激情。如果我可以将这个信息传递给我的员工和顾客，那么我就不用担心这些数字。我相信成功源自于激情！

能不能大概介绍一下呢。

好的。35%来自美国，25%来自迪拜，大约28%来自中国。亚太其他地区和欧洲增长的越来越快，产品中蛋糕和巧克力糕点约占收入的35%。

你从法国进口黄油到中国，然后再把产品出口到欧洲，你怎么能在欧洲保持竞争力呢？

我的竞争力就是独特的产品，比如我们最近生产的挞皮和蛋卷筒就都是手工制作的。

在开发新产品上，你的参与程度有多大呢？

99%参与，因为这是我的工作。

我在你的办公桌上看到了很多监视生产的屏幕，你是一个控制狂吗？

根本不是！事实上我很少看那些屏幕。不过在装监视器以前曾经发生过一起事故，一位员工把勺子掉进了一台新买的每小时生产1万个迷你卷的机器里，致使我们损失了一台很昂贵的机器，可是又没有人愿意负责。自从装了摄像头以后，就再也没有发生过类似的故事。

你怎么描述你的管理风格呢？

信任员工。

你在管理上的缺点有哪些呢？

太在意销售额，有的时候过于对员工施压(笑)。

你犯的最大错误是什么？现在你的做法跟以前有什么不同？

我这样说可能有些傲慢，不过我没有犯过很大的错误。

你在这么多美味的围绕下是如何保持体形的？

我每天都试着去健身房锻炼一小时。

哪些工作占据了你每天大部分的时间？

访问客户和开发新产品。我每年都想生产一种新的产品。

在寻找人才方面有没有遇到什么困难呢？

没有，因为我已经找到了人才并且留住了他们，我的高级管理人员都已经跟我一起工作了许多年。另外，我不会雇用一位刚从学校毕业的MBA做高级管理人，在我这里所有的员工都要从头开始做起，在获得一定的经验后一步步提升。

La Rose Noire的盈利能力如何呢？

西饼和面包是低利润行业。5年前我就开始在中国做生意，可是直至今年才开始看到盈利，同样的，18年前我开始在香港经营，在最开始的10年根本没有赚钱，当然我们还是可以顾得住成本并不断开始盈利。不过坦率的说，近几年我们的机器不断贬值，同时我们又在全速扩张，我发现西饼行业可以做得不错，但是在香港真正赚钱的是不动产生意(笑)。

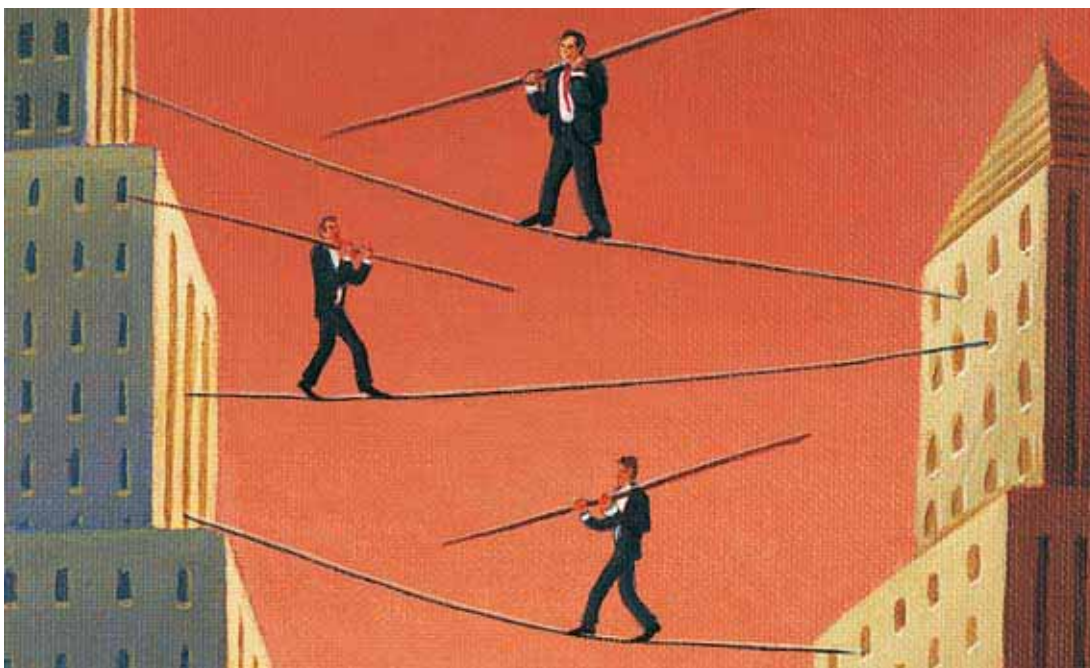
Gerard Dubois

Gerard Dubois, 47岁，是一名训练有素的西饼厨师，他创立并拥有香港面包和西饼公司黑玫瑰(La Rose Noire)。在瑞士见习结束后，他先后旅居伦敦、太平洋小岛关岛、名古屋和上海，期间一直担任希尔顿集团的西饼房厨师长。1991年，曾经是瑞士冰球国家队队员的Gerard Dubois决定在香港开创自己的事业。在取得挑剔而骄傲的香港顾客的赞赏后，他迅速将事业扩展到中国大陆，并在东莞(广东省)成立了他的第二个生产线，作为九龙生产线的补充。La Rose Noire公司共有约600名员工，其产品从中国出口到全球市场—包括酒店、航空公司、饭店和零售点。Gerard已婚，有两个孩子，全家生活在香港。他热爱运动，还是3本西饼食谱的作者。

Lack of Stability and New Threats

War and terrorism insurance for Swiss Nationals abroad

By Diego M. Rovelli, MScM and Managing Partner of Swiss Insurance & Financial Advisors (SIFA) GmbH, Zurich, and Dr. Felix Bossert, Executive Director of Soliswiss – Genossenschaft Solidaritätsfonds der Auslandschweizer, Berne



MODERN THREATS.

Much more dispersed and not any longer turned directly against the state or military forces.

Unknown to many compatriots, the Swiss Confederation affords a unique protection to its citizens abroad through Soliswiss – The Cooperative Society Solidarity Fund for Swiss Nationals Abroad, a fully privately owned company under Swiss Law. Although available as so-called lump-sum insurance since 1958, it has recently been re-labelled “War & Terrorism Insurance” to stress its purpose. It is a protection against the negative impact of war and war-like events that have traditionally been excluded in all insurance policies, at least since 1936. The range of hazards faced all over the world, however, has remained much the same to the clientele. If anything, risks have become more fragmented and complex since the end of the Cold War.

The end of the bipolar political system brought, contrary to predictions of many who expected speedy democratization processes all over the world, lack of stability and new, yet unknown threats. Modern states and para-state organizations have appeared and the international environment is more and more concerned about the growing role of non-state actors. Moreover, globalization has led to unexpected alliances of organized terrorism, narcotic cartels, modern piracy as well as

regional political and financial interest or pressure groups. This all brings about new threats to established structures, security and particularly ordinary citizens. Modern threats are much more dispersed and not any longer turned directly against the state or military forces. Actually, the contrary: the new risks are targeting civilians and civilians' financial interests.

Therefore, the “War & Terrorism Insurance” policy covers a wide-range of political risks such as

- a) War on land, in the air, at sea and in space: conventional armed conflicts, movements of troops and materials
- b) Consequences of war: changes of territories, occupation of territories, demographic movements and migration streams, refugees
- c) Civil war
- d) Low-intensity conflict
- e) Revolution
- f) Violent overthrow of government
- g) Internal, transnational and international terrorism
- h) Piracy in the air or at sea
- i) Politically motivated kidnapping for prisoner exchange / release

- j) Mutiny, politically motivated strikes, unrest and riots
- k) Confiscation
- l) Expropriation
- m) Nationalization
- n) Deprivation

Assets are threatened and life and limb are at risk: For the average individual, impacting political risks may appear to be rare events. But when an individual, a family or a business is affected by war or war-like events, it is a huge blow of fate. Such risk exposure cannot be fully avoided, but its consequences can be mitigated. An insurance community managing pooled resources can achieve that aim more readily than a personal network consisting of friends and family.

Number of conflicts not diminished

The world has become a village due to the advent of complex economics and political interdependencies since the 1970s – or before – current affairs demonstrate that the number of conflict zones has not diminished. Quite the contrary appears to be the case, as political risks have proliferated since the fall of the Berlin Wall. Recall tragedies such as 9/11, the London tube attack, the Madrid train attack, the Bali bombing, the Mumbai assault and the recent Indonesian bombing to name a few terrorist events. The demand for security and material safeguards therefore remains great.

Soliswiss extends protection to its members only. The Cooperative Society Solidarity Fund for Swiss Nationals Abroad is open for every Swiss citizen or company. If registered at

the embassy or consulate, a person or company may apply for a membership for protection. The policy is issued on first loss basis and is principally paid out on total loss only. The Swiss Confederation is the guarantor of this protection with an unlimited default guarantee. This extraordinary agreement applies for up to CHF 150'000 per person. The Confederation's support enables Soliswiss to redeem its promise of paying up every time a legitimate claim is made.

If the protection needed should exceed CHF 150'000 per individual, not the Swiss Confederation but some external guarantors, namely Soliswiss' prime reinsurers, would deliver the ultimate protection. The same applies if a Swiss company sponsors its non-Swiss employees in such a scheme. For the time being, everybody has appreciated the idea that the Swiss taxpayers show solidarity with their compatriots, but leave it to the market place to protect larger clients beyond the clearly defined government-supported framework.

It is never too early and never too late to apply for Soliswiss membership. Why not trust Soliswiss and its unique relationship with the Swiss federal government? Soliswiss offers all interested parties in-depth advice and bespoke services, which are client-driven and thus best help reflect their current, specific security exposure, thus affording them calibrated protection. Soliswiss help its clients make their adventure abroad a real success. To that end, Soliswiss acts as a personal political risk manager to its members.

SIFA is a preferred partner of Soliswiss in Asia.

For more information: www.soliswiss.com as well as www.sifagmbh.com



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不稳定因素和新的威胁

旅居国外瑞士人的战争恐怖险

作者: Diego M. Rovelli 工商硕士, 苏黎世瑞士保险和金融顾问公司经理合伙人
Felix Bossert博士, Soliswiss 执行总裁-旅外瑞士人的安定基金, 瑞士波恩



现在的威胁更加广泛

很多的瑞士同胞都有所不知, 瑞士联邦政府通过Soliswiss, 一个完全合法的私人公司, 对其旅居国外的侨民提供一个非常独一无二的保障---瑞士侨民的社会安定合作基金。这是从1958年才开始的所谓的一次性付款的保险险种, 最近又被更名为“战争和恐怖险”。它是一个针对由战争和类似战争所引起的负面影响的保险, 通常这种风险是在传统的保险险种中被排除的, 至少从1936年起。由冷战结束以来, 战争和恐怖活动的危险已覆盖全世界, 对投保人来说, 其风险从未改变, 而只是变成更加的分散和复杂。

由两端政治体制的末期所带来的, 是与许多人期待中的预言“全球加速民主化进程”相反, 缺少安定性, 并不断的出现新的未知的威胁。现代民主化的国家, 极端权利控制的国家都已出现, 在国际性的大环境中越来越多的关注于那些无政治化统治的国家。全球化已导致了人们未期待的有组织性的恐怖联盟, 毒品交换, 现代化的海盗行为及地区性的政治和经济利益分歧或压力团体。这些都给稳定基础建设, 社会安定和特别平常的市民带来新的威胁, 而且现代的威胁更分散, 不再转变为直接的国家或军队的战争, 事实上, 更相反, 新的风险更针对平民及平民的经济利益。

战争和恐怖险保障了很大范围内的政治性风险, 就如如下:

- A) 在陆地, 空中, 海上甚至宇宙中的战争: 惯例性军事分歧, 部队和物资的调动。
- B) 战争所造成的后果: 恐怖活动的变化, 恐怖活动所占据的地方, 人口的流动, 移民和难民潮。
- C) 内战
- D) 低度的分歧
- E) 革命性的活动
- F) 暴力地推翻政府
- G) 内部的, 跨国的国际性恐怖活动
- H) 空中或海上的海盗活动
- I) 由政治原因引起的绑架行为以作为监狱犯的交流或释放。
- J) 反叛, 政治性煽动地罢工, 政治动乱和暴动
- K) 没收
- L) 征用
- M) 国有
- N) 公有化

生命, 财产都正在遭受威胁: 对普通人来说, 政治性的风险所造成的影响不是通常会遭遇的, 但是, 一旦遭遇战争或类似战争的情况, 对个人, 家庭或公司都是一种非常的不幸。此类的风险是不可以完全防止的, 但是其后果是可以缓和的。一个由保险成员管理的资源将比私人的关系网络, 包括朋友、家庭更有效的达到这一目的。

自从1970年以来或更早, 由于经济的复杂化和政治的中立化, 世界正变成一家, 而最近在一些分歧区域所发生的事件说明了风险并没有减少。正相反, 政治性的风险自从柏林墙倒塌后日见增加。回忆一下9.11事件, 伦敦地铁事件, 马德里火车事件, 巴厘的炸弹事件, 印度孟买的袭击事件和最近印尼的几起以恐怖主义命名的炸弹事件。对安全及安全物质的需求正因此保持庞大。

Soliswiss 只对其成员提供附加的保障。这一针对瑞士侨民的社会安定合作基金是可以对每个瑞士公民和公司提供的。如果您在瑞士大使馆或领事馆注册, 个人或公司若需享有此保障就必须先申请成为Soliswiss的会员。战争和恐怖险是在第一损失的基础上制定的, 但实际上按照全部损失来理赔的。瑞士联邦政府对此险种在理赔时的无限制违约作担保。

如果个人投保的保障超过15万瑞士法郎, 那么就会由所谓的Soliswiss的再保险公司来代替瑞士联邦政府来提供最后的保障。同样的申请也用于当瑞士公司对非瑞士籍的雇员提供这一担保时。在现阶段, 每个人都对瑞士纳税人对其瑞士同胞所体现的团结精神非常感激, 但是如果是针对一个庞大的客户群, 那么这将是瑞士政府所特定的这种政府对其国民的保障, 将会对这类需求留给保险市场上的各大保险公司。

我们为什么不信任Soliswiss 和瑞士联邦政府的这一独一无二的协作关系呢? 人们将永远不会太早也不会太晚来申请成为Soliswiss 的会员? Soliswiss 提供给每个有兴趣的个人和团体有深度的咨询和建议并帮助设定非常顾客性的服务, 会符合对顾客现时的特殊安全保障需求, 并提供给顾客标准化的保障。一直以来Soliswiss 成功地帮助他们的成员在他们现时的国外居留的安全, Soliswiss 在一定的程度上对其成员演绎了一个私人的政治风险管理人。

瑞士保险和经融顾问有限公司(SIFA)是Soliswiss 在亚洲特别推荐的合作伙伴。

如您对以上话题有任何问题, 意见或建议, 还是您想申请我们的季度的新闻信, 请发邮件至info@sifagmbh.ch

Applied Science – the Step from Idea to Solution



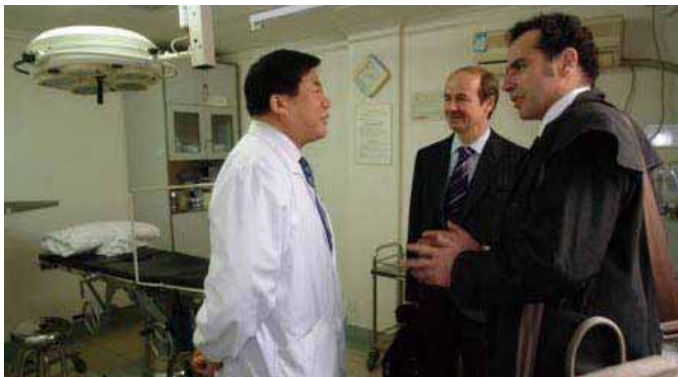
By Flavia Schlegel, MD, MAS, Executive Director swissnex Shanghai / Vice Consul General



Searching the internet for a definition of applied science I found on Wikipedia that “applied science is the application of knowledge from one or more natural scientific fields to solve practical problem...Applied science is important for technology development.” On the free dictionary it says “Applied sciences are the disciplines dealing with the art or science of applying scientific knowledge to practical problems...” Switzerland is the world’s most competitive country according to The Global competitiveness Report 2009-2010 (www.weforum.org), the People’s Republic of China leads the BRIC countries. Looking more closely at the detailed data one can see, that both countries still have room for improvement when it comes to innovation. The speed with which a country finds an efficient market solution to a practical problem is an important factor for its innovation capacity. Competitiveness can therefore be increased by mastering well the art of applied science. Sino-Swiss cooperation can enable both countries to become even better artists.

Striving Toward a Comprehensive Partnership

By Dr. Maio Chen, SSSTC Program Coordinator in Switzerland



From left to right: Prof. Changlin Mei, Director Nephrology Institute, CZH, Prof. Rudolf Wüthrich, Director Clinic for Nephrology ZUH, and Dr. Andreas Serra



Bridging the cultural chasm between the East and the West has never been easy. Looking back toward the hundreds of years of contact between China and the West, there had been more conflicts than cooperation until a few decades ago. This year marks the 20th anniversary of the first scientific cooperation agreement signed between China and Switzerland. With more than 50 SSSTC projects approved and funded, we are glad to say that SSSTC, a governmental program, has contributed toward the building of a bridge in bringing the two cultures closer together than ever.

Although collaborating in cutting edge research is a sure and fruitful way in promoting understanding and cooperation between Switzerland and China, building an enduring partnership between the two countries is not all about technology transfer and commercial dealings. In its program conception, the SSSTC strives to foster trust and friendship through a broadened

scope: Although there is still priority field restriction for the JRP (joint research projects), such restriction is lifted for the other instruments. We are glad to report that such measures are now proven fruitful.

In the western world as well as in China, health care has become one of the central issues in our societies. The addition of “medicinal sciences” as one of the priority research fields cannot be timelier in this regard. After one and half years of this addition, we are now receiving applications on collaboration in clinical medicine in addition to the usual basic life science research projects. Clinical practice and translational research are areas where a joint effort can really benefit both countries. As Dr. Andreas Serra, the research team leader for the autosomal dominant polycystic kidney disease in the University Hospital Zürich (USZ), said after a 5-day visit (accompanied by Dr. Schlegel from swissnex Shanghai) to Shanghai Chang-Zheng Hospital: “I am very impressed with the enthusiasm I saw in Chang-Zheng Hospital (CZH). Their technical achievement

in (kidney) dialysis and blood-washing techniques is at the forefront in this field of clinical practice.” According to Dr. Serra, the sheer volume in Chinese hospitals allows their teams to dedicate their effort, sharpen their skills on specific procedures. The clinical procedures they have developed in China can really benefit USZ in training its clinical fellows. Dr. Serra’s team, on the other hand, with its excellent clinical research capability, can assist the CZH in achieving international research standards. Dr. Serra now leads an SSSTC exchange project between the two hospitals.

Great potential of mutual benefit

It’s worthwhile to mention that, so far, these collaborations have been made possible through the effort of Chinese scholars. Dr. Tian Yinghua, a renowned surgeon in both China

and Switzerland, has recently arranged the visit of Professor Pierre-Alain Clavien (Director, Department of Visceral and Transplantation Surgery, USZ) to two hospitals in China. With professor Clavien duly impressed with the two Chinese hospitals and sees the great potential of mutual benefit, Dr. Tian is now working on the details in bringing the two sides together.

Both Dr. Tian and Mr. Wu, the scientist who arranged Dr. Serra’s trip to Shanghai, expressed that, the SSSTC provided the platform they needed to bring the Swiss partners to China. Once there, it was not hard to convince the Swiss scientists of the quality of the Chinese scientists/hospitals. The SSSTC is happy to be instrumental to these joint ventures and wish them a long-lasting, mutually beneficial partnership.

Read in the next issue: Sino-Swiss collaboration in professional education.

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Waste Water Treatment

Swiss innovation catches China’s interest

By Prof. Dr. Claudio R. Boër, Vice Director for R&D and Professional Education swissnex Shanghai / Consul



The Hydronet project has been presented by swissnex Shanghai at the Sino-Swiss Water Forum in Shanghai on 2009-06-05 with the participation of the Vice-Minister of Water Resources Mr Hu Siyi (on the right).

The main way to treat wastewater is based on sedimentation, the process to let the dirty particles slowly settle at the bottom of large tanks in form of a sludge that is collected by racks. The process is simple but has many disadvantages. It requires large surfaces; and it takes several hours. It also smells and the sedimentation wastewater treatment plants must be located far away from the urban sites and it requires a complex and long set of canalizations to bring the water from the urban sites.

Floating instead of sinking

A different process is emerging. Instead to let the dirty particle sink (to sediment) to the bottom, they are pushed to the surface by injecting air into the water. The tiny bubbles adhere to the suspended matter causing it to float to the surface of the water where it is removed by a skimming device looking like a big scoop.

A small engineering company located in Lugano, KWI, has teamed up with the University of Applied Science of

Southern Switzerland (SUPSI) to innovate the floatation process and make it even more efficient, cost effective and adaptable to many different kind of waste water treatment. The Hydronet prototype is compact, odorless and fully computer controlled. The EAWAG, the world-renowned Swiss federal institute for water research is testing and certifying the new equipment. The Hydronet project is supported by the Federal Agency for Innovation (CTI). The results from the Hydronet can be summarized as follows. The dissolved air floatation process requires 1/100 of the space (and it can be even put underground) and it is 150 times faster. The final Hydronet prototype will be controlled by a computerized system under development at SUPSI using artificial intelligent algorithms.

This innovative project caught the attention of Chinese scientists and governmental officials. Recently, a cooperation agreement has been signed between the Swiss engineering company KWI and the Waste Water Treatment Plant of Zhangcun in Dongguan. First results of the installation of demonstration equipment at the Zhangcun plant will be expected in 2010.

应用科学——由构思迈向解决方案

swissnex
shanghai



作者: Flavia Schlegel博士, 理学硕士, 瑞士联邦政府科技文化中心 (swissnex Shanghai) 执行主任/副总领事



在网上搜索应用科学的定义时我发现维基百科里是这样写的:“应用科学是将一种或一些自然科学领域的知识应用到实际问题的解决的科学……应用科学对于技术发展至关重要。”在自由词典 (the free dictionary) 中是这样说的:“应用科学是解决科学知识的实际应用艺术和科学的学科……”在2009-2010全球竞争力报告中 (www.weforum.org) 瑞士是最具竞争力的国家,中国位居“金砖四国”之首。如果仔细研究一下这两个国家的详细数据,我们会发现在创新领域他们都还有进一步发展的空间。一个国家为某个实际问题找到有效的市场解决方案的速度是决定其创新能力的重要因素。因此,竞争力可以通过掌握应用科学而加以提升。中瑞合作可以帮助双方在该领域进一步发展。

努力建立全面的合作伙伴关系

Chen Maio 博士, 中瑞科技合作项目瑞士协调员



填补东西方在文化上的差异从来都不是一件容易的事,回顾中国与西方上百年的接触与交流,总是矛盾冲突多于合作。直到近几十年来,这一情况才有所改观。今年是中瑞第一项科技合作协议签署二十周年,二十年来已有50多项中国瑞士科技合作项目 (SSSTC) 通过审核并获得资金。我们很高兴的是中国瑞士科技合作项目这一政府项目搭建了使两国文化比任何时候都更靠近的桥梁。

尽管在前沿研究上的合作是促进瑞士与中国间相互理解的富有成效的方法,但是两国间长期稳固伙伴关系的建立不仅仅是技术转移和商业关系。在项目理念上,中国瑞士科技合作项目争取在更广阔的范围内建立信任与友谊。虽然在优先合作研究项目上仍有一些限制,但在其他方面已经取消了这些限制。我们很高兴的向大家报告目前这一方法取得了成功。

不仅在西方世界,在中国也是一样,卫生保健已成为我们社会的关键问题之一。如此说来,将“医疗科学”加入到优先研究领域中正当其时。在过了一年半后的现在,我们收到了许多来自常规基础生命科学研究项目之外的临床医学合作方面的申请。临床实践与早期临床研究是真正能使两国合作受益的领域。正如苏黎世大学医院 (USZ) 的常染色体多囊肾病研究团队的主任Andreas Serra博士在对上海长征医院进行了

为期五天的访问后 (由上海瑞士科技中心的Schlegel博士陪同) 说的:

“我在长征医院所看到的人们的激情使我印象深刻,它们在 (肾病) 透析以及血液洗涤技术上所取得的技术成果位于该领域临床实践的前沿。”Serra表示中国的医院为医生钻研医学研究和提高某些手术技能提供了大量的支持。中国所发展的临床手术技术将有利于USZ的临床医生培训。另一方面,Serra博士的团队具有优秀的临床研究能力,他们也将帮助长征医院的研究达到国际标准。Serra博士目前领导着两个医院间一个中国瑞士科技合作交流项目的研究。

值得一提的是,由于中方学者的努力,使得迄今为止这些领域的合作成为可能。如在中瑞均负有盛名的Tian Yinghua外科医生,组织了Pierre-Alain Clavien教授 (USZ内脏与移植手术部主任) 对中国两家医院的访问。Clavien教授对这两家中国医院印象很好,并认为如果双方合作将可以带来共赢,目前Tian博士正在为使双方实现合作而进行一些细节方面的工作。

Tian医生和组织Serra博士的上海之旅的吴先生均表示中国瑞士科技合作项目提供了一个将瑞士伙伴带到中国的平台。瑞士科学家来到中国后,他们很容易就可以看到中国科学家/医院的素质。中国瑞士科技合作项目很高兴能在合作项目的建立中发挥作用,并希望这种合作将是长期的、双方共赢的。

下期话题: 中瑞职业教育合作

废水处理技术

瑞士创新成果赢得中国关注

作者: Claudio R. Boër 博士, 瑞士联邦政府科技文化中心技术研发与职业教育副主任 / 领事

对

于废水的处理主要是基于沉淀技术,就是让具有污染性的颗粒以污物的方式留在容器的底部并由管架收集。这一过程很简单,但有许多副作用,如要求很大的容器表面、费时长,过程中伴有味道,而且废水沉淀处理厂必须设在远离城市的地方,因此需要很长很复杂的管道将废水从城市输往处理厂。

用气浮取代沉淀

现在又有一种新的处理方法出现,与使污染颗粒物下沉 (沉淀) 到底部不同的是,它通过向水中注入空气将颗粒物推向水的表面。细小的泡沫附在悬浮物上使其浮向水面,之后只需用一种看起来像大漏勺的器具将悬浮物撇起即可。

位于瑞士卢加诺的一家小型工程公司KWI与瑞士南部应用科学大学

(SUPSI) 合作创新气浮技术以使其更有效、成本更低廉,并可应用于多种不同废水的处理。Hydronet密实、无味并完全由电脑控制。世界著名的瑞士联邦水科学与技术研究所 (EAWAG) 正在对这种新设备进行测试与检验,Hydronet项目由瑞士创新促进机构 (CIT) 赞助。Hydronet项目的研究结果可以如此概括:溶解性气浮技术只要百分之一的空间 (甚至可以在地下进行),但处理速度却要快上150倍。Hydronet模型将最终由电脑化系统控制,此项技术正由SUPSI使用人工智能计算进行研究。

这一创新项目引起了中国科学家与政府部门的注意,最近,瑞士工程公司KWI与中国东莞樟村的废水处理厂签署了合作协议,预计2010年示范设备将在樟村废水处理厂安装完成。

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“Creating a Small AFG in China”

Interview with Edgar Oehler of Arbonia-Forster Group (AFG)

Interview, Fabian Gull



EDGAR OEHLER: Three decades of Far East experience.

Edgar Oehler is the majority shareholder (since 2003), Chairman and CEO of Arbonia-Forster Holding (AFG), an integrated construction industry supplier. In 2008, the Group created its own Asia-Pacific regional branch. Oehler is a former political heavy-weight in Switzerland. He acted during 24 years as a member of the National Parliament on behalf of the Christian Democratic Party (CVP). Non smoker and passionate runner Edgar Oehler also was the President of the Swiss Tobacco Industry, Editor in Chief of various regional newspapers in the eastern part of Switzerland and Colonel of the Swiss Army. The early riser is looking back to three decades of Far East experience.

The Bridge: What is your business confidence level for your company for 2010 on a scale from 1 (disastrous) to 10 (excellent)?

Edgar Oehler: I would say seven.

And for the next five years?

Nine.

Your confidence level for next year is slightly lower than the average confidence of Swiss businessmen in China whereas in a 5 year period you are significantly more confident - this according to the results of the “Swiss-Cham China Business Confidence Survey” which showed values of 7.5 for 2010 and 8 for the next five years.

Indeed, particularly in the long run we are

highly confident with all the construction boom we expect to happen – especially in Asia.

Tell us something about what AFG is doing in China?

In China we had some limited activities with four divisions: Heating Technology & Sanitary Equipment, Surface Technology, Steel Technology and Kitchens and Refrigeration. These divisions were acting individually. Coordination and especially a vision was missing. That's why we built the new division “Asia Pacific” last year to bundle and better handle our activities in China. We aim nothing less than building up a small AFG in China.

Why only last year? Isn't this a rather



CANTON THURGAU. AFG headquarters in Arbon, Switzerland.

late China market entry for a globally operating entity like yours?

Not quite. We are doing business with China since 1996 in the field of Heating Technology. We started off cautiously with not too much China-knowledge. At that time it was just courteous to do business in China. Today it is an absolute necessity!

How did it slip into gear since you reinforced your efforts last year?

I am content. We are building up a healthy and solid foundation for future growth. We are hiring people, invest in marketing, we build up networks and the planning of a production site for high-tech surfaces in Changshu (Jiangsu province) is well under way.

So you are still in a build-up phase. Can you quantify your targets?

Last year, shortly before the global economic crisis, i set the target to generate a minimal turnover of CHF 150 Mio within five years for the Asia-Pacific region. We won't accomplish this goal so our revised target for bespoke period is now CHF 80 Mio.

And in terms of people?

At this point in time we have established a Competence Center in Shanghai and Beijing with each ten staff members. Also, we have set up a company in Singapore which will kick-off early 2010.

How important is China on a group level in terms of turnover?

Insignificant. Around 1%.

“Before it was just courteous to do business in China. Today it is an absolute necessity!”

Do you solely produce for the domestic market in China?

No. We have a complex production linkage system. We produce in Europe for China. We produce in China for the domestic market, for regional exportation in Asia-Pacific as well as for European markets.

Switzerland managed to get along quite well in the global downturn situation. What are the reasons?

Transparency, an innovation driven economy with competitive products, a flexible labour market, plenty of innovative niche players, a good reputation of Swiss products as well as a very positive image of Switzerland. The Swiss are economically very open-minded ever since. That helps in times of crisis.

And on a political level? Switzerland came under massive international scrutiny for its tax system and banking secrecy. UBS was on the verge of bankruptcy, not to mention the current affairs “Lybia” and “Polanski”. How

do you think the Swiss government prevailed?

It depends. In economic matters, particularly UBS, I believe the government - in cooperation with the Central Bank of Switzerland - did a very good job. Politically, our system and its top political representatives revealed weaknesses. The Federal Concil only responded very late to what was happening around the country and failed to proactively spot and solve problems.

AFG Arbonia-Forster

AFG Arbonia-Forster-Holding is based in Arbon, Canton Thurgau, Switzerland. Listed on the SIX Swiss Exchange, the company has leading positions as an integrated construction industry supplier and in selected areas of technology.

AFG comprises five divisions: Heating Technology and Sanitary Equipment, Kitchens and Refrigeration, Windows and Doors, Steel Technology and Surface Technology. The Group has production facilities in Switzerland, Germany, the Czech Republic, the UK, China, France, the United States and Slovakia.

In 2008, AFG employed around 6150 people, and posted revenues of CHF 1570.6 million and earnings before interest and tax of CHF 86.6 million. In Asia, other than China, AFG is also active in Indonesia, Japan and Singapore.

“在中国创立一个小AFG”

CEO专访瑞士艾府杰集团(AFG)Edgar Oehler

访谈：方必安



Edgar Oehler:
三十年的远东经验

Edgar Oehler是瑞士艾府杰集团(AFG)的主席和CEO，也是自2003年以来集团最大的股东。艾府杰集团主要供应建筑用品，2008年，集团在亚太地区成立了分公司。Oehler先生曾在瑞士政界具有举足轻重的地位，他连续24年代表瑞士基督教民主党出任国会议员。尽管Oehler先生本人不抽烟并且热衷于跑步等健康运动，他担任着瑞士烟草行业协会主席的职位，还是瑞士东部地区各大区域报纸的总编辑和瑞士军队上校。作为一位很早就获得成功的人士，Oehler先生将与我们一起回顾他30年的远东经历。

《桥》：如果用1(损失惨重)到10(业绩突出)表示您对您公司2010年经营的自信程度，您的自信度是几？

Edgar Oehler：应该是7。

对于今后5年经营的自信度呢？

今后5年是9。

根据“中国瑞士商会商业信心调查”，在中国的瑞士商人对2010年经营的平均信心度为7.5，对今后5年的平均信心度为8。由此可见，您对您公司明年的经营信心略低于我们的调查结果，而对未来5年更有信心。

确实如此。我们对长期内建筑业的繁荣发展充满信心，尤其是亚洲。

请您介绍一下AFG目前在中国的业务。

我们在中国有四个部门经营着不多的业务：加热技术与卫生设备、表面技术、钢铁技术和厨房设备与制冷系统等。由于这些部门单独运作，因此缺乏协调性尤其是整体感。为了解决这个问题，我们去年成立了“亚太部”来归拢和更好的管理我们在中国的业务。我们的目标是在中国创立一个小AFG。

为什么去年才成立呢？对于像AFG这样的全球性企业来说这个时候才进入中国市场是不是太晚了？

不是太晚。我们1996年就开始在中国开展加热技术的业务，在对中国了解不充分的情况下，我们刚开始的时候十分谨慎。另外，那个时候在中国开展业务只是一种礼仪，今天在中国开展业务是公司发展的必须！

自去年你们成立“亚太部”以来，它的发展情况如何呢？

我对它的发展很满意。我们雇佣了新员工、加大了对市场营销的投入并搭建了关系网，现在正在计划在常熟市(江苏省)建设一个高科技表面产品生产基地。这些都为我们公司今后的增长奠定了健康和稳定的基础。

也就是说在中国的业务还是处于搭建阶段。您怎么量化你们的目标呢？

在去年全球经济危机发生前，我对亚太区设定的目标是在5年内实现最少1.5亿瑞士法郎的营业收入。由于经济危机的影响，我们只好将这一目标调整到了8000万瑞士法郎。

在员工方面的目标呢？你们现在在中国有多少员工？

目前我们在上海和北京的技术资格中心分别有10名员工，另外我们还在新加坡成立了分公司，2010年开始运营。

中国业务在全球的营业收入中占比多少？

很低。

你们的产品完全提供给中国国内市场吗？

不是，我们的产品联动系统很复杂，我们在欧洲生产的产品会卖到中国，在中国生产的产品会供应给中国国内市场并出口到亚太市场以及

欧洲市场。

瑞士在处理全球经济放缓的影响中做的很好。

原因是什么呢？

有几个原因：透明性、创新型经济并拥有竞争力强的产品、灵活的劳动力市场、众多针对性强的创新型企业以及瑞士产品的声誉和瑞士国家的积极形象等。瑞士人在经济上一直都是很开明的，这也在我们度过经济危机中起了积极的作用。

在政治上呢？如瑞士的税收系统和银行保密制度受到了来自国际上的巨大审查压力，瑞银集团曾处于倒闭的边缘，还有当下的“利比亚”和“波兰斯基”事件。您认为瑞士政府是怎么解决这些问题的呢？

每个事件的解决方法都不同。在经济上，尤其在瑞银集团问题上，我认为政府通过与瑞士中央银行的合作取得了成功。在政治上，我们的体制和高级政治代表的弱点显露了出来，联邦委员会对这些的事件的反应过于迟缓，并且没能积极地发现并解决问题。

瑞士艾府杰集团(AFG)

艾府杰集团总部设在瑞士图尔高州的阿尔邦。公司在瑞士证券交易所上市，并在建筑产品供应行业与某些技术领域具有领先地位。艾府杰公司共设有5个部门：加热技术与卫生设备、厨房设备与制冷系统、窗户与门和钢铁技术与表面技术等。公司在瑞士、德国、捷克共和国、英国、中国、法国、美国 and 斯洛伐克均设有工厂。2008年，公司共有员工6150人，实现营业收入1.57亿瑞士法郎，息税前利润8660万瑞士法郎。在亚洲，公司除了在中国有业务外，还在印度尼西亚、日本和新加坡有经营业务。

China's Green Opportunity

China can and must achieve sustainable growth. Although the country has already charted an ambitious course to improve its energy efficiency and environment, a McKinsey study finds opportunities to do even more.

By Martin Joeress, Jonathan R. Woetzel, and Haimeng Zhang of McKinsey



Lagra Database

China's rapid development over the past three decades has lifted hundreds of millions of people out of poverty and catapulted the country into the ranks of the world's largest economies. Over the next several decades, as China's economy continues to grow and the pace of urbanization accelerates, the country must not only ensure that it has sufficient and secure energy resources but also mitigate the impact such growth will have on the environment.

China must address these issues without compromising its growth or the living standards of its people. But the population's huge size and the scale of the economy have created a uniquely challenging problem. To deal with it, China's policy makers have developed an extensive body of regulations and policies to raise the energy efficiency of many sectors and thereby reduce growth's environmental consequences, including carbon emissions.

The rising challenge of sustainability

To help policy makers and business leaders identify and prioritize additional opportunities to raise energy efficiency in China and make its growth more sustainable, we undertook a study of technologies, measuring their impact on greenhouse gas emissions. We looked only at approaches that are technically feasible and likely to be commercially available no later than 2030.

Our findings indicate that by that year, the aggressive deployment of a range of new technologies—for instance,

electric vehicles and new waste-management approaches—would allow China to reduce its demand for imported oil by an additional 30 to 40 percent over the energy efficiency goals already identified. The country also could stabilize coal demand at current levels. This approach would substantially improve China's already significant plans to improve energy security and reduce carbon emissions. However, these goals will require considerable capital investment. For the next two decades, China would need to spend €150 billion to €200 billion a year—on top of currently planned spending on energy efficiency—to realize the full potential of the technologies. What's more, several barriers stand in their way, including social costs (such as layoffs) and retraining. And the window of opportunity for capturing benefits is short: every building or power plant constructed without these technologies subtracts from the total energy efficiency gains they could deliver.

Adopting them will require nothing less than a “green revolution” in the generation of power, the fueling of vehicles, the management of waste, the design of buildings and cities, and the nurturing of forests and agriculture. Policy makers will have to make the decisions, but to do so they must understand the opportunities and trade-offs.

The world's top emitter

China is home to one-fifth of the world's population. In 2007, the country consumed about 2.7 billion tons¹ of standard

coal equivalent² and emitted about 7.5 gigatons of greenhouse gases. Indeed, it has overtaken the United States as the world's top emitter. China's demand for energy—and the emissions and pollution associated with its use in industry, power generation, transport, and waste landfills—also contributes to other environmental ills. In northern China, desertification threatens arable land and grasslands. Water shortages are a growing problem across the country.

China emits a greater proportion of greenhouse gases from its industrial sector than most other nations, developed or developing. These high levels reflect the massive industrialization China is now undergoing. Emissions from the provision of electric power and heat to commercial and residential buildings are a consequence of China's rapid urban growth and rising living standards. The country's moderate level of transport-related emissions reflects the current low penetration of motor vehicles—about 4 vehicles per 100 people in 2008, compared with almost 60 vehicles in Japan and 80 in the United States.

As China's GDP grows in tandem with urbanization, the country's emission profile will change. Long-term projections based on a consensus of leading Chinese economists suggest a 7 to 8 percent annual GDP growth rate.³ By 2030, two-thirds of China's roughly 1.5 billion people will live in urban areas (see sidebar, "Green mind-set"). To cope with that increase, China plans to build 50,000 new high-rise residential buildings and 170 new mass-transit rail and subway systems. (By comparison, Europe has only 70.) As the economy and the cities grow, so will household incomes. Carbon emissions will rise as a result of higher consumption, including additional cars.

Suppose China made no efforts beyond what it is now doing to improve energy efficiency and diversify its fuel supply, and there were no improvements in technology. We call these admittedly unrealistic assumptions the frozen-technology scenario. Annual emissions of greenhouse gases in China would rise to 22.9 gigatons by 2030, from 6.8 gigatons in 2005. In this scenario, demand for oil would increase fourfold by 2030, requiring imports of about one billion tons a year. Demand for coal would more than triple, requiring annual imports of 3.7 billion to 4.2 billion tons.

The frozen-technology scenario was developed to serve as a hypothetical baseline. Actual emissions will probably be far lower because China is improving its energy efficiency and reducing consumption of carbon-intensive sources of energy and emissions. For the past two decades, the country's carbon efficiency has gone up by 4.9 percent a year, largely through higher industrial productivity.⁴ The government has set a goal of reducing the country's energy intensity by 20 percent during the current five-year plan.⁵ The measures now envisioned include adopting stricter, high-efficiency building codes and higher fuel efficiency standards for vehicles, shuttering subscale capacity in energy-intensive sectors, and stepping up investments in renewable energy.

We estimate that China's current efforts and recently enacted policies could reduce the country's energy intensity by 17 percent during every five-year interval from 2005 to 2030. Under what we call the policy scenario, China would emit 14.5 gigatons of carbon emissions annually by 2030. The gains in energy efficiency would come largely in the industrial sector

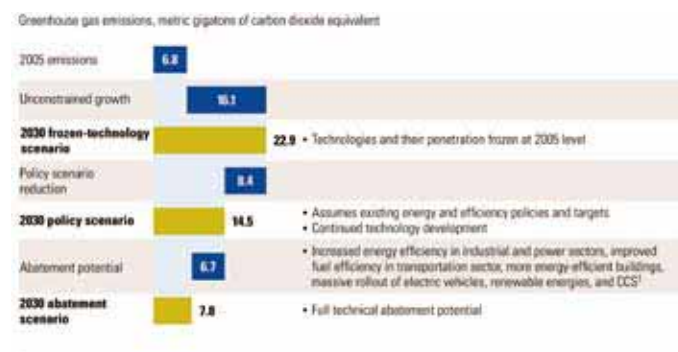
(through lower energy intensity and better waste recovery) and in the generation of power (through increased use of nuclear and renewable energy and improvements in coal-power efficiency). More energy-efficient new buildings and better fuel efficiency in car fleets would help as well. These improvements would also reduce the need for imported energy—by 30 percent for oil and 85 percent for coal.

To achieve these gains, the government will have to make a significant effort, rigorously enforcing policies and providing incentives for investments in energy efficiency across sectors.

A green revolution

China has set ambitious goals for improving its energy efficiency. Yet we found additional opportunities (Exhibit 1), including even greater use of technologies or policies that China has already committed itself to pursuing, such as building additional nuclear power plants and planting forests. Other opportunities involve current and emerging technologies, such as electric vehicles, new semiconductor-manufacturing equipment that's better at controlling fluorocarbon emissions, and the use of agricultural waste as a fuel for co-firing with coal (to reduce coal consumption) in cement kilns.

Exhibit 1: Three scenarios



We identified five major categories of energy efficiency and greenhouse gas-abatement opportunities that China could implement between now and 2030. If China pursued them successfully, it could reduce its dependence on imported oil by up to 30 percent more than the 30 percent reduction it currently hopes to achieve. The country could also stabilize coal demand at current levels, substantially reducing the proportion of electric power generated by using this fossil fuel, to 34 percent by 2030, down from 80 percent today. These efforts could enable China to hold its greenhouse gas emissions to roughly eight gigatons by 2030—roughly 10 percent higher than 2005 levels—without hindering growth.

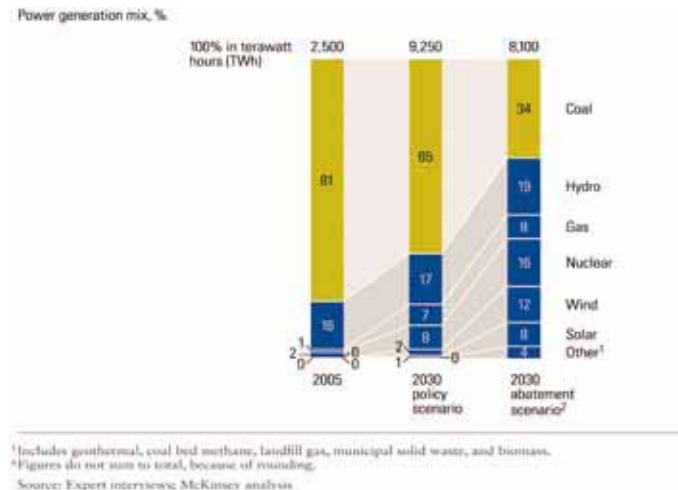
This would amount to nothing less than a green revolution in China. Let's look in detail at each of the five categories of opportunities.

Green power

As manufacturers ramp up the production of equipment for solar and wind power, the cost of implementing these technologies will decline. By 2030, China could generate 8 percent of its energy through solar and 12 percent through wind (compared with nearly nothing in each category today),

and the proportion of electricity generated by nuclear power could rise to 16 percent, from 2 percent; by hydropower to 19 percent, from 16 percent; and by natural gas to 8 percent, from 1 percent (Exhibit 2).

Exhibit 2: Green power in China



China is the world's largest exporter of photovoltaic solar panels, and we think it will hold that position for some time. The cost of the equipment used in China's photovoltaic solar-power installations should fall almost 80 percent by 2030, given the country's (and the world's) projected photovoltaic capacity and this sector's historical learning rate (cost reductions gained through experience as production volumes rise). As the technology improves, solar-power generating costs will fall to € 0.045 per kilowatt-hour in 2030, making it just 50 percent more costly than coal rather than five times, as it is today.

Similarly, China could have an installed nuclear capacity of 182 gigawatts by 2030, an increase of 74 gigawatts over the policy scenario's goal. China manufactures 70 percent of the equipment necessary for nuclear plants, and the cost for this equipment has been falling. If the country develops nuclear power to the fullest extent, by 2030 carbon emissions could fall by 470 million tons, at a cost of €3 per ton.

By 2030, carbon capture and storage could abate 730 megatons of greenhouse gas emissions from China's most important fuel source, coal, at a cost of over €60 a ton. This technology is very expensive, but more than 25 percent of China's coal-based power plants—both new and retrofitted—could be equipped with it by that year.

Green transport

Cars and trucks are a relatively minor source of greenhouse gas emissions in China, but that's about to change. By 2030, it could replace the United States as the nation with the most vehicles—over 330 million of them. Let's assume that internal-combustion engines have by then become as fuel efficient as possible at a reasonable price. Still, China will have to rely on imports for 75 percent of its oil.

Our policy scenario estimates for energy efficiency from the adoption of electrified vehicles are conservative. Suppose, however, that China began to adopt them widely starting in 2015 and ramped up the rate of adoption to 100 percent of new vehicles by 2020. Our analysis shows that demand for

imported oil might fall 30 to 40 percent. China could emerge as a global leader in this industry by leveraging the country's low-cost labor supply, its fast-growing vehicle market, its success in rechargeable-battery technology, and its substantial investments (both made and committed) in R&D for electrified transport.

From 2016 through 2030, capital investments of over €70 billion a year would be needed for an extensive rollout of electrified vehicles and for the recharging infrastructure China will need to accommodate them.

Green industry

The steel, chemical, cement, coal mining, and waste-management sectors play a crucial role in China's economic development. All of them also use significant amounts of energy: they accounted for about one-third of total consumption and 44 percent of carbon emissions in 2005 and are also a major source of air and water pollution. China is shutting down or consolidating subscale, inefficient facilities in each of these sectors, has set energy-reduction targets for their largest enterprises, and is adopting global best practices in production. These and other government energy-saving efforts in the industrial sector could save 450 million tons of standard coal equivalent a year by 2030.

New quality standards for cement, introduced in 2008, set higher specifications for clinker (the primary material in it) and stricter definitions for clinker substitute. We expect such measures to cut the use of cement in concrete by 10 percent, cutting the cement industry's emissions proportionately. Similarly, China is setting standards to reduce the energy used in burning waste and in recovering and reusing coal-bed methane—standards that would reduce the emissions from those activities. Such policy scenario efforts would allow China to reduce emissions in these sectors to 4.8 gigatons by 2030.

China has ample opportunity to reduce each segment's emissions below those envisioned in the policy scenario: new technologies and process improvements could abate an additional 1.6 gigatons of greenhouse gas emissions. The cement industry, for instance, could use agricultural waste as an alternative fuel for co-firing with coal in kilns. In steel making, thin-strip direct casting (casting and rolling in a single step) could substantially reduce energy use and emissions.

The challenges of implementing new technologies include limited talent and funds for investment. The skilled technicians and engineers needed are scarce in China, and because its universities don't teach some of the required skills (such as systems engineering), these limitations will persist. In certain sectors, the opportunity cost of investment in energy efficiency is high; in others, the total returns seem too low. Executives also dislike the idea of shutting down plants to improve them or of accepting the losses associated with introducing novel technologies or processes. To pursue the additional efficiency and abatement opportunities, the government will have to address these hurdles.

Green buildings

China's rapid urbanization will continue for several decades. Apartment houses, office buildings, and commercial centers are proliferating to accommodate this massive migration and economic development. In the frozen-technology scenario, total

emissions from energy consumption in the buildings sector will rise from 1.1 gigatons of greenhouse gases in 2005 to 5.1 gigatons by 2030. Policy scenario moves to address the growth of the sector's energy use and emissions could reduce them to 3.2 gigatons by 2030. We estimate that implementing the full range of practical technologies would cut emissions to 1.6 gigatons annually.

Total floor space (including residential and commercial) will more than double in China, from 42 billion square meters in 2005 to 91 billion in 2030. Rising income levels are pushing up energy use as households buy more appliances and air conditioners. To address these issues, the government is setting targets so that more heat for urban buildings comes from relatively energy-efficient sources, such as natural gas and combined heat and power plants, rather than coal and diesel. Over time, natural gas will replace coal (or coal gas) for cooking and for heating water in many areas. The government is also imposing strict new energy-efficiency rules for building codes, enforcing firm energy-efficiency ratings for appliances, and rolling out subsidies to encourage the shift to more efficient lighting.

Beyond these government-directed efforts, the opportunities include replacing low-efficiency community boiler systems in northern China with large network district-heating systems⁶ and retrofitting commercial buildings with automated systems and pumps to regulate heating, ventilation, and air conditioning more efficiently. China can also apply to new buildings the principles of "passive design": reducing the energy used for heating and cooling by designing insulation, ventilation, and the use of natural light and shade at the same time. Older buildings can be retrofitted with energy-saving materials such as insulation and replacement windows.

Such moves will exact a social cost. Higher energy-efficiency standards for heating controls and pumps could drive inefficient local players from the market. More expensive heating systems and market-driven fees for heating could make it unaffordable for lower-income Chinese unless they get subsidies. Enforcing higher building standards will drive up administrative costs. Many of the government's efforts so far haven't been very effective. Despite awareness programs and subsidies, the penetration of compact fluorescent lightbulbs (CFLs) has reached only about 10 percent a decade after the bulbs were introduced. The government hasn't banned incandescent bulbs from the market (as Australia, for instance, has) and faces an uphill battle to persuade consumers that more expensive but energy-efficient CFLs pay off in the long term.

Green ecosystem

Farms and forests are carbon sinks. Although China has halted most activities that led to deforestation, virgin forests now cover only 11 percent of the country's total land area. By our estimates, government forestation and reforestation programs will raise forest coverage to 20 percent of China's total land area by 2010. China is also trying to limit grazing on grasslands (90 percent of its 400 million hectares of grassland is degraded or at risk), to introduce sustainable agriculture, and to promote the use of methane from animal manure for heating and cooking in rural areas. (Some 23 million rural families heat their homes and cook with methane.) By 2030, these policies will reduce emissions by 0.29 gigatons annually.

Additional abatement opportunities along similar lines could provide 0.64 gigatons of possible abatements by 2030. These include increasing the forest cover to 25 percent rather than 20 percent, raising more animals in enclosures rather than letting them graze on grasslands, and promoting agricultural practices such as conservation tillage and the use of the latest fertilizers. These opportunities could also have knock-on effects: improved land-management practices, for example, control desertification and use water supplies more productively.

Exhibit 3: No time to waste

Loss of potential abatement as a result of 5-year delay in technology implementation, metric gigatons of carbon dioxide equivalent



To realize the full potential of the additional opportunities, China would need to start now; even waiting a few years would reduce the possibilities for raising energy efficiency and abating emissions. To capture the full abatement potential in the power-generation sector, for instance, China must start implementing by 2010 most of the measures we recommend. China builds new plants continually. Coal-fired ones brought on line next year, if not retrofitted with expensive carbon-capture technologies, will emit greenhouse gases for the next 30 to 40 years. A simple sensitivity analysis shows that postponing the implementation of cleaner power technologies for just five years would cut the abatement potential by up to 1.5 gigatons of greenhouse gases—over 50 percent of what's possible (Exhibit 3). A ten-year delay would reduce the abatement potential by 80 percent.

By starting now to embrace the technologies for a green revolution, China can create a future with greater energy security and lower energy emissions—without compromising economic growth and the living standards of its people.

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Notes:

1. Metric tons: 1 metric ton = 2,205 pounds.
2. One kilogram of standard coal equivalent = 7,000 kilocalories.
3. In this report, 7.8 percent is used as long-term GDP growth rate for China.
4. Carbon efficiency measures the amount of GDP produced per unit of greenhouse gas emissions.
5. Energy intensity, which measures the energy efficiency of a nation's economy, is calculated as units of energy per unit of GDP.
6. Coal plants that heat water and channel it to buildings.

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中国的绿色机遇

雄心勃勃的计划，麦肯锡的一项研究发现了更多的机遇。

作者：尤茂庭 华强森 张海濛



Laguna Database

中国过去30年的高速发展使得数亿人口摆脱了贫困，并使这个国家也迅速跻身于世界最大经济体之列。在未来数十年中，如果中国要保持经济持续增长，并加快城市化步伐，她不仅必须确保自己拥有充足和安全的能源，还要努力减轻这种增长对环境造成的影响。

中国必须在不降低增长速度、并不断提高人民生活标准的条件下解决这些问题。但是，庞大的人口数量和经济规模带来了独一无二的挑战。为了应对这一挑战，中国的决策者必须制定范围广泛、数量庞大的法规和政策，以提高诸多行业的能效，并减轻增长对环境造成的影响，其中就包括碳排放。

为了帮助中国的决策者和企业领导人发现更多提高能效的机遇，对这些机遇的优劣进行排序，并使增长更具有可持续性，我们对一些技术进行了研究，衡量了它们对温室气体排放所产生的影响。我们只对那些技术上可行且在2030年前有可能实现商业化的方法进行了研究。

我们的研究结果指出，到2030年，积极部署一系列新技术——诸如电动汽车和新的废物管理办法——将使中国进口石油的需求在已经确认的能效目标基础上，再降低30%~40%。中国还可以将煤炭需求稳定在目前的水平上。这种方法将极大地改进中国业已出台的增强能源安全性、降低碳排放的重大计划。但是，实现这些目标将需要相当大的资本投资。在未来20年中，中国需要在现有提高能效的支出计划的基础上，每年再新增支出1500亿欧元~2000亿欧元，以充分发挥这些技术的潜力。此外，在实现这些目标的道路上还存在着一些障碍，其中包括下岗等社会成本和再培训等问题。可以用来实现这些优势的机遇期是短暂的：每座没有采用这些技术的建筑物或发电厂都会降低这些技术提高能

效的收益。

采用这些技术不啻于要在发电、汽车燃料、废物管理、建筑物和城市设计、植树造林和农业方面进行一场“绿色革命”。决策者需要做出决策，理性的、基于对技术的经济性和可行性透彻理解的决策。

可持续性所面临的日益加剧的挑战

中国养育着全世界1/5的人口。据估计，在2007年，中国消耗了27亿吨1标准煤当量2的能源，排放了75亿吨的温室气体。它很可能已经取代美国，成为世界上第一排放大国。中国对于能源的需求以及将能源用于工业、发电、交通和废物填埋所产生的排放和污染，也导致了其他环境问题的产生。在中国北方，荒漠化威胁着耕地和草原。水资源短缺的问题在全国日益严重。

中国工业部门排放的温室气体所占的比例高于包括发达国家和发展中国家在内的大多数国家所释放的比例。这种高水平反映了中国正在经历大规模的工业化。为商用和住宅建筑提供电力和热能所产生的排放是中国飞速发展的城市化和人民生活水平不断提高所导致的结果。中国的交通所产生的中等排放量则反映了其机动车的普及率目前较低的现状——2008年，在中国，每100人拥有4辆汽车，而在日本和美国，每100人分别拥有60辆和80辆汽车。

随着中国GDP的不断增长以及接踵而至的城市化浪潮，中国的排放模式将发生变化。我们根据中国主要经济学家普遍认可的7%~8%的GDP增长率3进行了长期预测。到2030年，中国15亿人口中有约2/3的人将生活在城市(参见附文“绿色思维”)。为了应对这种增长，中国计划兴建5万座高层住宅建筑和170条公共轨道交通线和地铁系统。(与之形成对

照的是，欧洲仅有70条此类系统)。随着经济和城市的发展以及家庭收入的提高，包括汽车在内的消费量也会进一步提高，进而将导致碳排放的上升。

与发达国家的消费者相比，中国的消费者消耗的能源较少，但是，政府应该鼓励消费者进一步提高能效。比如，适当调整室内温度水平、购买高燃油效率的汽车、更多地使用公共交通工具，以及采用拼车出行，他们每年就可以减排4亿吨温室气体。

如果中国在提高能效和实现燃料供应多样化方面不做出进一步的努力，那么，在技术方面就不会得到进一步提高。我们将这种显然不符合实际的假设称为技术冻结情境。根据这样的假设，中国的温室气体排放将从2005年的68亿吨上升到2030年的229亿吨。在这种情况下，到2030年，中国对石油的需求将增加4倍，每年需进口10亿吨石油。对于煤炭的需求将增加3倍多，每年需进口37亿吨~42亿吨。

我们提出的这种技术冻结情境是为了提供一个假定的基准线。当然，因为中国正在提高能效并降低碳密集型能源的消耗和排放，因此，实际排放将可能低很多。过去的20年中，中国的碳效率每年提高4.9%，主要是通过提高工业的能源效率来实现⁴。政府制定了在目前正在实施的十一五计划中，将能源强度降低20%的目标⁵。现在所设想的措施包括采用更加严格高效的建筑规范，提高机动车燃油效率标准，关闭能源密集型行业的小厂，以及增加对可再生能源的投资。

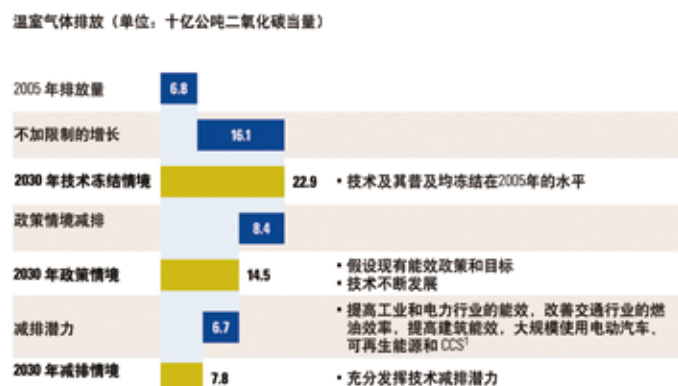
我们预计，中国目前所做的努力以及最近出台的政策，将在2005年~2030年内，每5年将其能源强度降低17%。根据我们所称的政策情境，到2030年，中国每年的碳排放量为145亿吨。能源效率的提高将主要来自工业行业(通过降低能源强度和改进废物的回收利用)和电力行业(通过核能和可再生能源的使用，以及提高煤炭发电的效率)。能效更高的新建筑和汽车燃油效率的提高也会有所帮助。这些改进还可降低进口能源的需求——将石油进口需求降低30%，煤炭进口需求降低85%。

为了获得这些收益，政府将做出巨大努力，严格地强化政策实施，并为各行各业提高能效的投资提供奖励。

一场绿色革命

如上所述，中国已经为提高能源效率制定了雄心勃勃的目标。但是，我们还是发现了更多的机遇(图表1)，其中包括在中国已经承诺进行努力(比如兴建更多核能发电厂，更多地植树造林)的基础上，加大技术应用或政策实施。其他机遇还涉及利用现有的和新兴的技术，比如电动汽车、有利于氟碳化合物减排的新型半导体制造设备，以及在水泥窑中使用农业废料与煤炭一起作为燃料(以降低煤消耗)。

图1：三种情境



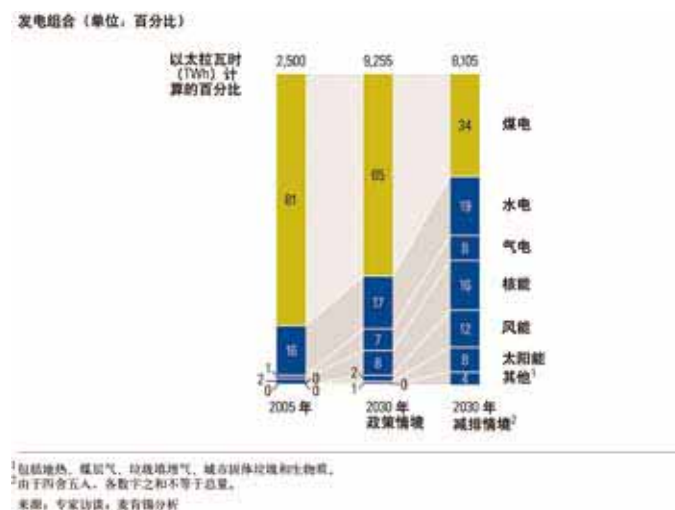
在提高能效和温室气体减排方面，我们发现了中国可以从现在到2030年间利用的5大类机遇。如果中国能够成功地抓住它们，那么，中国可以在目前希望实现的对进口石油的依赖降低30%的基础上，再降低30%。到2030年，中国还可以将煤炭需求稳定在目前的水平上，将煤炭发电占总发电量的比例从目前的80%大幅度降低到占34%。

对中国而言，这不亚于一场绿色革命。让我们详细谈谈这5大类机遇。

绿色发电

随着制造商不断提高太阳能和风力发电设备的产量，实施这些技术的成本将会下降。到2030年，在中国的能源中，太阳能将占到8%的比例，而风能将占到12%(而目前这两种能源所占比例微乎其微)，核电在电力所占比例将从2%提高到16%，水力发电将从16%提高到19%，而天然气发电也将从1%提高到8%(图表2)。

图表2：中国的绿色发电



中国是世界上最大的太阳能光伏设备出口国，我们认为，她在相当长的时期内将保持这一地位。根据中国(以及世界)预计的太阳能光伏设备生产能力以及该行业的历史学习率(通过产量提高获得经验进而降低成本)，到2030年，中国太阳能光伏设备设备的安装成本将降低近80%。随着该技术的进一步改进，到2030年，太阳能发电成本将降低到每千瓦时0.045欧元。

与此类似，到2030年，中国会将核电发电能力提高到1820亿瓦，比政策情境目标提高740亿瓦。中国可以制造核电厂所需设备的70%，而这些设备的成本也在不断下降。如果中国最大限度地发展核能，到2030年，碳排放将下降4.7亿吨，而每吨的减排成本只有3欧元。

煤炭是中国最大的温室气体排放燃料，到2030年，碳捕获和碳存储技术会将煤炭产生的温室气体减排7.3亿吨，成本为每吨60多欧元。这项技术目前十分昂贵，但到2030年，中国将有超过25%的煤电厂——包括新建厂和经过技术改造的老厂——配备该技术。

绿色交通

汽车和卡车在中国温室气体排放中目前所占的比例较小，但这一情况将会发生变化。到2030年，中国将取代美国成为拥有汽车数量最多的国家，拥有量将超过3.3亿辆。我们假设，届时内燃发动机的燃油效率将以合理的价格得到极大的提高。即便如此，中国依然会有75%的石油要依靠进口。

我们的政策情境预计的采用电动汽车所提高的能源效率是比较保守的。但是，如果假设中国从2015年开始广泛采用电动汽车技术，并且到2020年，新车的采用率达到100%，我们的分析显示，对于进口石油的需求将会降低30%~40%。通过利用中国的低成本劳动力、快速发展的汽车市场、它在充电电池方面取得的成功以及在电动交通方面的巨大投资(包括已经投入和承诺的)，中国将成为该行业的全球领袖。

从2016年到2030年，为了广泛推广电动汽车并兴建所需的充电基础设施，中国每年需要资本投资超过700亿欧元。

绿色工业

钢铁、化工、水泥、煤炭开采和废物处理行业在中国的经济发展中发挥着举足轻重的作用。这些行业也大量消耗能源：2005年，它们占到了能源总消耗量的1/3，以及碳排放的44%，同时，还是空气和水污染大

户。中国正在“关停并转”这些行业中的小厂和低效设施，并为大型企业确定了节能目标，而且还在生产中采用全球最佳实践。这些以及政府在工业部门中的其他节能努力，到2030年可节能4.5亿吨标准煤当量。

中国在2008年实施了水泥的新质量标准，提高了熟料(水泥的主要材料)的规格，并为熟料替代品制定了更加严格的定义。我们预计，这些措施会将混凝土中水泥的用量减少10%，并相应地减少水泥行业的排放量。与此类似，中国正在为降低废物燃烧所用能源以及煤层气的回收和重新利用制定标准，这些标准将降低这些行业的排放量。政策方面的这些努力到2030年将使中国在这些行业中减排48亿吨。

在政策情境所设想的基础上进一步降低每个行业的排放方面，中国拥有巨大的机遇：新技术和流程改进可将温室气体排放再降低16亿吨。比如，在水泥行业，可以使用农业废料与煤炭一起作为窑中的替代燃料。在炼钢业，薄带连铸(浇铸和轧钢一步完成)可大幅度降低能耗和排放。

实施这些新技术所面临的挑战包括缺乏人才和资金有限。在中国，由于大学并不教授一些所需技能(比如高效的生产制造系统设计等)，因此熟练的技术人员和工程师非常匮乏，而这种匮乏将长期存在。在某些行业，能效方面的投资的机会成本非常高，而在另一些行业，总回报又似乎过低。高管们不喜欢关闭工厂对其进行改造的办法，也不接受引进新技术或流程所带来的相关损失。为了抓住进一步提高能效和减排的机遇，政府必须协助克服这些障碍。

绿色建筑

中国的快速城市化将持续数十年。公寓楼、办公楼和商务中心将快速增长以适应大规模的移民和经济发展。在技术冻结的情境中，建筑行业能源消耗所产生的温室气体总排放，将从2005年的11亿吨增长到2030年的51亿吨。然而，如果采用政策情境应对该行业能源使用的发展和排放问题，到2030年，排放可降低至32亿吨。我们预计，全面运用各种可行的技术每年可减排16亿吨。

从2005年到2030年，中国的总楼面面积(包括住宅和商用)将翻番，从420亿平米增加到910亿平米。不断提高的收入水平将推动家庭购买更多的电器和空调，进而推高能源的使用。为了解决这些问题，政府正在制定目标，使得建筑供热更多地采用天然气和混合热电厂等相对高效的能源，而不是煤炭和柴油。随着时间的推移，在许多地区天然气将取代煤炭(或煤气)用于做饭或烧热水。政府还在建筑规范中增加了更加严格的提高能效的新规定，对家电强制进行能效评级，并提供补贴，鼓励改用更高效的照明灯具。

除了这些政府主导的努力外，这些机遇还包括在中国北方采用区域供暖系统⁶，取代低效的社区锅炉系统，改造没有自动化系统和热泵的商用建筑，以提高供暖、通风和空调系统的效率。中国还可以对新建筑应用“被动设计”原则：在保温、通风系统的设计中使用自然光线和遮光，以减少用于供热和制冷的能耗。对老建筑也可以进行保温和门窗等用材的节能改造。

这些举措都需要付出社会成本。对于供暖控制系统和泵采取更高的能效标准，将把低效的当地从业者赶出市场。更昂贵的供暖系统和市场化的供暖费用，会使得中国的低收入家庭在没有补贴的情况下无法承受。强制实施更高的建筑标准将推高行政管理的成本。迄今为止，政府所做的许多努力都收效不大。尽管进行了宣传教育活动并提供了补贴，节能荧光灯(CFL)在推出10年后的普及率仅达到了10%。政府并没有(像澳大利亚已经做的那样)强行禁止白炽灯上市。要说服消费者，节能荧光灯虽然更昂贵，但能效更高，因此从长期看更划算。这项说服工作也是一项艰巨的任务。

绿色生态系统

农田和森林都是碳汇(可吸收碳)。尽管中国已经停止了大多数森林采伐活动，但原始森林在中国的覆盖率只占国土总面积的11%。据我们估计，到2010年，政府的植树造林和森林再造计划将使森林覆盖率提高到占国土总面积的20%。中国还努力限制在草场放牧(中国4亿公顷草原中有90%正在退化或存在退化风险)，引入可持续农业，在农村地区推广使用由动物肥料产生的沼气取暖和做饭。(目前，已有2300万户农村家庭

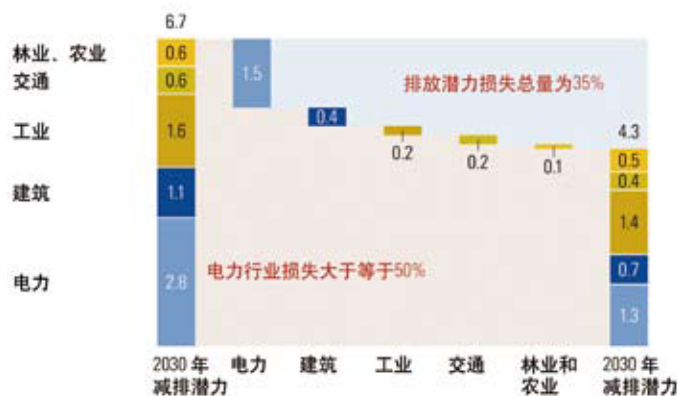
使用沼气取暖和做饭)。到2030年，这些政策可每年减排2.9亿吨。

到2030年，其他类似的减排机遇还可能减排6.4亿吨，其中包括将森林覆盖率提高到25%而不是20%，提高牲畜的圈养率而不是在草原上放养，进一步实施保护可耕地和使用最新化肥等农业措施。这些机遇还可能产生连锁撞击效应：比如改进土地管理，可以控制荒漠化，并提高水源的利用效率。

为了充分实现这些技术的潜力，中国需要从现在就开始行动。等待数年，就可能降低提高能效和减排的可能性。比如，为了充分发挥电力行业的减排潜力，中国必须在2010年前实施我们所建议的大部分措施。中国正在不断建设新的火力发电厂，如果不对这些电厂采用昂贵的碳捕获技术进行改造，它们将在未来30年~40年间不断排放温室气体。一项简单的灵敏度分析显示，更清洁的发电技术的实施如果推迟5年，累计效应到2030年，温室气体的减排潜力就可能降低达15亿吨——超出了该技术可能减排能力的50%(图表3)。如果推迟10年，则可能使减排潜力丧失80%。

图3：时不我待

技术实施推迟5年对减排的影响(单位：十亿吨二氧化碳当量)



从现在做起，拥抱绿色革命技术，中国可以创造能源更加安全、能源排放更低的未来，同时无需牺牲经济增长和人民生活水平的提高。

作者简介：

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注释：

1. 公吨：1公吨=2,205磅。
2. 1千克标准煤当量=7,000千卡。
3. 在本报告中，我们使用7.8%作为中国GDP的长期增长率。
4. 碳效率衡量每单位温室气体排放所产生的GDP值。
5. 能源强度衡量一个国家经济的能源效率，定义为单位GDP的能耗值。
6. 供应热水并将其输送到建筑物的煤厂。

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绿色思维

通过重新思考城市规划的方法和鼓励消费者一点一滴地改变行为，中国可以在实施更加环保的技术所产生的减排潜力的基础上，进一步降低能耗并将温室气体排放再降低10%。在人口稠密且拥有大量高层建筑的城市区域，其能效比以低层建筑为主的城区要高10%~15%。规划中人口密集度更高的城市还可以利用公共交通的优势来减少私人轿车的使用。我们估计，通过提高城市人口密度而产生的温室气体减排潜力每年为3亿吨。

Moulüe – Supraplanning

An unknown Chinese planning concept besides the Game Theory

By Prof. Dr.iur. Dr.phil.Harro von Senger



Legra Database



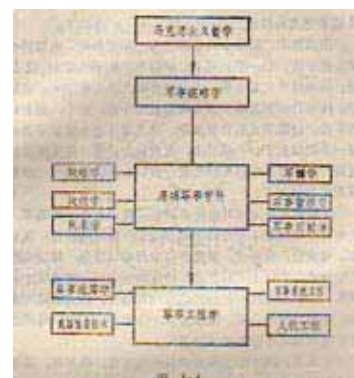
Moulüe – “boryaku” – has a very bad meaning in the Japanese language. It sounds like “ill-intended deception” or the like. Japanese people are shocked if they hear this word. Quite contrary to that, in the Chinese language “moulüe” has no negative connotation. Therefore, there are a lot of books sold in the People’s Republic of China on “Moulüe”. They speak about the “Moulüe” of Mao Zedong as well as about the “Moulüe” of Deng Xiaoping and so on.

Moulüe theory in China

What does “Moulüe” mean? In its technical sense, it has such a specific meaning that a ready made Western term is not available. There is no other way than to create a new term in the Western language concerned. In this case, Confucius’ advice to “rectify the names” is not sufficient. There is the need to “create a name” so that a certain thing can be correctly denominated.

The contemporary “Moulüe” interest in the People’s Republic of China is certainly connected with the “Military Science of Moulüe” which has obtained a semiofficial status in the system of Military Science of the PRC since a few years. Therefore, the basis of my

analysis of “Moulüe” is publications on the “Military Science of Moulüe”. Firstly, I want to reproduce a schema taken from Li Bing-yan: Junshi Moulüexue (Military Moulüe Science), volume 1 (Beijing 1989, p. 9):



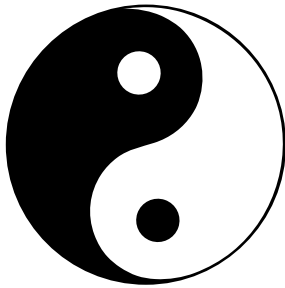
It is not necessary to explain the whole chart. Relevant is the fact that at the top, Marxist philosophy is positioned. On the second place down from the top, we find the entry “Military Science of Moulüe” (also translating as “Science of Military Moulüe”). Then

there are three entries at the left side, from up to down:

- Science of Strategy
- Science of Military Campaigns (also translating as "Operational Science")
- Science of Tactics

The striking point in this schema is that "Moulüe" is above "Strategy". That means, "Moulüe" is situated on a higher planning level than strategy. In the West, the highest planning level is the strategic planning level. I do not know a Western word designating a planning level above it. Since Chinese Moulüe is above (in Latin language: supra) the Western strategic planning level, I have chosen "Supraplanning" for the translation of "Moulüe". "Supraplanning" as seen from this perspective means that Moulüe has - in its extreme form - time dimensions which are far longer than the common Western strategic planning intervals.

But there is a second reason for the translation "Supraplanning" which is connected with another quality of "Moulüe". This specific feature can be explained with the well known Taijitu:



Moulüe-Planning is not only positioned in the white or in the black hemisphere of the Taijitu. In this context, the white part can be understood as the whole set of problem solving methods which are based on transparency, regularity, conformity with generally accepted rules and ways of thinking. The Western Game Theory has its place in the white sector. The black part symbolizes all those problem solving methods which are not transparent, which do not conform to routine thinking and are using surprising ways to achieve a target. What characterizes the Chinese Moulüe-Planner is the fact that his face is all the time above (in Latin language: supra) the Taijitu, in other word, the Chinese Moulüe-Planner looks all the time down to both the black and the white side. His planning horizon is above the two big alternative problem solving mechanisms: the orthodox and the unorthodox way to achieve an objective. Therefore, Moulüe Planning is constantly oscillating between normal and norm deviating (here not in a criminal, but legally acceptable sense) scenarios of problem resolution.

This is quite different with any Western decision theory I know. Western decision theories are very strongly relying on the "white" Game Theory and on mathematics and so on. A systematic theory of the strategic and tactical applicability of the Art of Cunning with respect to any kind of problem is, as far as I know, lacking in the West. Whereas the "white" problem resolutions are based on intellectual efforts, stratagems are used in the West certainly very often, but mostly on pure intuition, without careful stratagemical planning.

Moulüe practice

President Richard Nixon said in a speech given at Beijing University: "It is said that in the United States, one is thinking in decades...but in China, one is thinking in centuries." And Al Gore wrote in his report "A Generational Challenge to Repower America"

(17. Juli 2008): „Ten years is about the maximum time that we as a Nation can hold steady aim and hit our target.“ In other words, the longest strategic planning horizon in the most important Western country are ten years. It is quite different in the PRC. During his journey to the South, Deng Xiaoping coined the phrase:

"Uphold the Party's basic line, one hundred [years?] unwavering."

And in the Statute of the Chinese Communist Party (CCP) of October 21, 2007 (it was already written in previous Statutes, for instance that of 2002):

"China is in the primary stage of socialism and will remain so for a long time to come. This is a historical stage which cannot be skipped in socialist modernization in China which is backward economically and culturally. It will last for over a hundred years."

Furthermore, in the Statute of the CCP, there are enshrined two one hundred year targets:

"The objectives of economic and social development at this new stage in the new century are to consolidate and develop the relatively comfortable life initially attained, bring China into a moderately prosperous society of a higher level to the benefit of well over one billion people by the time of the Party's centenary [till 2021] and bring the per capita GDP up to the level of moderately developed countries and realize modernization in the main by the time of the centenary of the People's Republic of China [till 2049]."

According to the Statute of the CCP – with its long ranging targets to be achieved -

"the socialist cause in China will be crowned with final victory."

This time horizon which is much longer than the longest US planning horizons reminds of the ancient Chinese fable called "The Foolish Old Man Who Removed the Mountains". It tells of an old man who lived in northern China long, long ago. His house faced south and beyond his doorway stood the two great peaks, Taihang and Wangwu, obstructing the way. He called his sons, and hoe in hand they began to dig up these mountains with great determination. Another graybeard, known as the Wise Old Man, saw them and said derisively, "How silly of you to do this! It is quite impossible for you few to dig up those two huge mountains." The Foolish Old Man replied, "When I die, my sons will carry on; when they die, there will be my grandsons, and then their sons and grandsons, and so on to infinity. High as they are, the mountains cannot grow any higher and with every bit we dig, they will be that much lower. Why can't we clear them away?"

Get well acquainted with the Chinese Art of Cunning

What does Chinese political Supraplanning mean for the Western businessman? It means many things. Here, only one aspect can be mentioned. It is the long time horizon of the plans of the CCP. The planning horizon goes till 2021 and 2049. In this long time period, China will need foreign business contacts, otherwise it cannot overcome the backwardness characterizing the "long time" of the "primary stage of socialism". This generates a high degree of planning security for Western business. On the other hand, Westerners should not overlook the second aspect of "Supraplanning" and get well acquainted with the Chinese Art of Cunning. Without this knowledge, they can in the last run not match the Supraplanning of their Chinese business partners.

Book: Harro von Senger: Supraplanung, München 2008
www.supraplanung.eu

谋略

博弈论之外鲜为人知的中国规划思想

作者: iur博士和Harro von Senger哲学博士

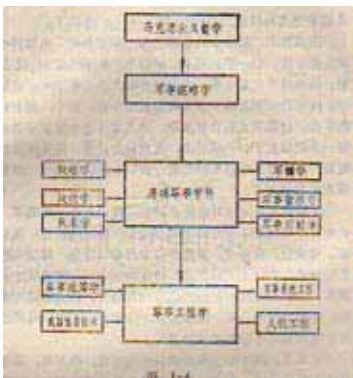


谋略在日语中为“boryaku”，具有贬义的词性，有“恶意欺骗”的意思，所以日本人会尽量回避这个词。正相反，在汉语中“谋略”并无贬义，而且中国还出版了许多关于“谋略”的书籍，其中有谈毛泽东的“谋略”的，也有谈邓小平的“谋略”的。

中国的谋略理论

“谋略”的定义是什么呢？从技术层面上来讲，西方语言中并没有一个现成的词语可以用来解释它，只好在相关的西方语言中创造一个新词。在这里，仅仅用儒家的“正名”是不够的，势必要通过“造名”来描写某些事物。

中国现代的“谋略”思想与“军事谋略”密不可分，多年来它已经在中国的军事学中取得了半官方的地位。因此，我对“谋略”的分析主要基于“军事谋略学”的出版物。首先，我想再现一下李炳彦的《军事谋略学》第一章中的一个图表(1989年出版于北京：第9页)：



首先我来解释一下图中与谋略相关的部分，在图表的最上方是马克思主义哲学，其次是“军事谋略学”，再往下最左边的三项分别是：战略学、战役学和战术学。

这个图中最关键的一点是“谋略”高于“战略”，也就是说“谋略”在规划中位于战略之上，而在西方最高的规划水平是战略而非谋略。由于中国的谋略高于(拉丁语为supra)西方的战略，因此我选用“supraplanning”这个词作为“谋略”的英文翻译。“Supraplanning”在这里的意思是谋略的时间跨度比一般的西方战略要长得多。

翻译成“Supraplanning”的第二个原因与“谋略”的另一个特点有关，这一特点可以用著名的太极图来解释：

在太极图中，谋略不仅仅位于白色或黑色某一部分，而是相生相存。在这里，白色的部分表示一整套透明、规范和墨守成规的问题解决方式，西方的博弈论就属于白色的部分。而黑色的部分表示一切不透明的、打破常规和出奇制胜的问题解决方式。中国的谋略家有这样一个特点，那就是他们的脸总在太极图的上方(拉丁语为supra)，也就是说中国的谋略家总是在同时关注着太极图的黑色和白色部分，他们的规划基于两大可选的问题解决机制：制胜的白色和黑色手段。因此，谋略规划总

是在正常的和非正常的手段(这里不是指以犯罪的方式，而是为法律所接受的方式)中间摆动。

这与我熟知的西方决策理论大不相同。西方决策理论主张利用“白色”的博弈论和数学方法等问题解决。据我所知，西方缺乏一套系统的智谋学战略和战术应用理论，尽管“白色”的问题解决方式注重智力努力，而且战略在西方有很广泛的应用，但是大多数还是单凭直觉，而非通过大脑思考进行的战略性规划。

谋略实践

理查德·尼克松在北京大学的一次演讲中说：“有这样一种说法，美国人只思考几十年后的事……但是中国人思考几个世纪后的事。”阿尔·戈尔在他的“重塑美国力量的时代挑战”(2008年7月17日)的演讲报告中讲到：“10年是我们这个民族能建立并完成目标的最长时期。”也就是说最主要的西方国家的战略规划水平最长也不过是10年。在中国则完全不同，邓小平在南巡过程中曾这样说过：

“坚持党的基本路线，一百年不动摇。”

在2007年10月21日中国共产党(CCP)的章程有这样的阐述(在以往的章程如2002年的章程中也有相关阐述)：

“我国正处于并将长期处于社会主义初级阶段。这是在经济文化落后的中国建设社会主义现代化不可逾越的历史阶段，需要上百年的时间。”

此外，在中国共产党的章程中，还设定了两个百年目标：

“在新世纪新阶段，经济和社会发展的战略目标是，巩固和发展已经初步达到的小康水平，到建党一百年时(2021年)，建成惠及十几亿人口的更高水平的小康社会；到建国一百年时(2049年)，人均国内生产总值达到中等发达国家水平，基本实现现代化。”

中国共产党的章程中对长期目标的实现也有阐述：

“中国的社会主义事业必将取得最终的胜利。”

中国的寓言故事“愚公移山”更加表明中国的规划周期比美国的最长规划周期还要长得多。这个故事讲的是很久以前一位住在中国北方的老翁，他的房子门前有两座大山——太行山和王屋山——挡住了道路，于是他下定决心带领他的儿子们开始移山。当另外一位被称为充满智慧的老翁——智叟看到他们这种举动时不屑的说道：“你们实在太糊涂了！你们几个人怎么可能把这两座大山搬走呢？”愚翁说：“我死后，我的儿子们会继续挖，我的儿子们死后，我的孙子们来挖，就这样子子孙孙不停的挖下去，无穷无尽。这两座山不会变的更高，只要我们挖一次，它就会变得矮一点，为什么我们不能把它们移走呢？”

熟知中国的智谋学

中国的政治谋略对西方商人意味着什么呢？它意味深长。这里我要讲的一点是中国直至2021年和2049年的长期规划，在这样长的时间周期里，中国需要与国外商业间保持联系，不然它将不能突破“长期”和“社会主义初级阶段”的落后局面，这对于西方商业来说是一种高度的规划上的保障。另一方面，西方人不应该忽视“谋略”的第二个方面，而应熟知中国的智谋学。如果没有这些知识，他们是无法与中国商业伙伴的智谋相匹配的。

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www.supraplanung.eu

Energy from the Earth

The origins of modern oil and natural gas industry falls at the feet of the ancient Chinese

By Garry McAlpine, Executive Producer Mercuria, "Legacy of China"



Garry McAlpine

On any given day, our world consumes over 70 million barrels of crude oil and over 200 billion cubic feet of natural gas to satisfy our demands for energy. Oil is primarily used to supply our love affair with cars, and to power our need for transportation of food, trade and people. The natural gas is primarily used to heat our homes and offices and power our industry. Every year we require more of this energy and the future trend for worldwide consumption is projected to expand by 44 percent over the next 25 years.

An amazing thing about our modern use of both crude oil and natural gas, is that we really only started using them in the late 19th century. From that point on, our consumption expanded rapidly alongside all the transportation innovations that occurred throughout the 20th century. Surprisingly though, coal still remained the world's most popular energy source right up until 1946 when it was first overtaken by oil. Today, demand for oil is at an all-time high, fuelled by the continued economic expansion of the world's new economies.

Roots of myth and superstition

In 2003, China overtook Japan as the world's second-largest consumer of oil and its demand for oil continues to grow at about 15% a year. With such an established reliance on these fossil fuels, it is often thought that its use is purely a phenomenon of our modern world, but this is not true. Crude oil seeping out of underground reservoirs has been collected and

used for lighting throughout recorded history.

More than 3000 years ago, it was recorded that oil pits existed near Babylon, and were also found on the banks of one of the tributaries of the Euphrates. Archaeologists have also discovered that both ancient Persian and Chinese writings recorded the use of naturally occurring petroleum as fuel for lighting.

But the real origins of our modern oil and natural gas industry, falls at the feet of the ancient Chinese. Before there was an understanding of what natural gas was, it posed somewhat of a mystery. Often, such things as lightning strikes would ignite gas that was escaping from under the earth's crust and create "eternal fires". These fires puzzled most early civilizations, and were the root of much myth and superstition.

Around 800BC, the discovered such a flame at Delphi by the ancient Greeks led it to being declared of divine origin and they built the temple of Apollo over the flame. This temple housed a priestess who was known as the Oracle of Delphi, who gave out prophecies delivered under the hallucinogenic influence of the seeping gases. If the Greeks had had a more practical view of the world, they might have realised, there was a much more productive use for these strange fumes and it took ancient China to show us the way to use naturally occurring gas.

Drilling for salt and brine

In China, salt was a huge economic item and a lot of the salt



traditionally came from the sea, but in the areas of China like Sichuan Province, miles from the sea, the only hope of getting salt was to try to drill for a salt well. This meant sometimes drilling hundreds of feet through rock. The Chinese were widely using iron ore tools by 600BC, well before anyone else and they used this technology to develop efficient drilling bits. Sometimes when they drilled for salt there was a disappointment and instead of finding salt water or brine spouting up, they found some gas escaping instead.

But they discovered that you could channel that gas through bamboo pipes and use it to make flames under giant iron pans in which you evaporated the brine from other wells to make salt. This was the creating of the beginning of the Chinese natural gas industry. As early as the Han dynasty in the 1st Century BC, the people of Sichuan province were drilling for salt and brine and with it, natural gas.

One famous gas well in Sichuan is over 1000 meters deep and in 1835, was the deepest well in the world. Another well in the region, is still producing 20,000 cubic meters of natural gas a day and in its lifetime, has accumulated a total of more than half a billion cubic meters, something that is still a record today.

Even when salt deposits and natural gas were not found together this did not deter the local people. Huge roller coasters of bamboo pipes were erected to transport the natural gas for miles. In the early 1800's in China, there were over than 13,000 wells producing some 30 billion cubic meters of natural gas. China's ingenuity in this most influential field of engineering was fully in place, one thousand four hundred years, before the West.

China's ingenuity

So while the Greeks were busy trying to define the future by sniffing natural gas at Delphi, the Chinese had already discovered something that would become the driving force of the modern world. Perhaps what is most remarkable is that China's ingenuity in this most influential field of engineering was fully in place, one thousand four hundred years, before the West. The techniques they developed for constructing their

wells are still reflected in modern day oil and gas drilling which is a real testament to China's early innovation. For instance, having men jumping on and off a beam to make the drill bit go down, 'kicking her down' as they called it, is a term still used in today's oil and gas industry.

In our modern era, Britain was the first country to commercialise the use of natural gas in 1785, when gas produced from coal was used to light houses, and streetlights. In the USA, gas was first used to light the streets of Baltimore in 1816. During most of the 19th century, gas was used almost exclusively as a source of light but without a pipeline infrastructure, it was difficult to transport the gas very far. With the advent of electricity, gas lighting fell out of favour and gas production dwindled. As such, natural gas discovered before 1950 was usually just allowed to vent into the atmosphere, or burnt off, when found alongside oil wells.

However after World War II, the advances in welding techniques, metallurgy and pipe rolling, enabled the construction of reliable pipelines and this led to a pipeline construction boom creating thousands of miles of pipeline over the world. Once the transportation of natural gas proved possible, new uses for it were discovered which included heating homes and water, powering manufacturing and processing plants and also generating electricity. What was seen as a waste product from the oil industry, once again became a vital source of clean energy. Something the Ancient Chinese already knew over 2000 years ago.

So why were the ancient Chinese scientifically and technically so far in advance of other countries, in their ability to drill and utilize petroleum and natural gas? The more complete answer can be found in the TV series "Legacy of China". This 2 x 60 minute HD docu-drama series, takes viewers along a path of discovery to find out why Chinese civilization has not only withstood the passage of time, but is also perhaps the foremost influence in early technological development of the modern world.

Mercuria MCG Hong Kong Ltd., (a division of Mercuria Energy Trading), produced 'Legacy of China' scheduled for international release in 2009.

地球上的能源

现代石油和天然气工业的真正起源于古代中国人

作者：盖瑞·麦卡宾(Garry McAlpine),《源·探索中国》执行制片人

全球每天都要消耗7000多万桶原油和2000亿立方英尺天然气，以满足我们对能源的需求。

石油基本上都是用来满足我们对汽车与日俱增的喜爱，以及为食物、商品及人员的运输提供动力。天然气则主要是用来为住宅与办公场所供暖及为工业提供动力。

我们对能源的需求每年都在增加，而未来25年，全球能源需求预计将增长44%。

令人吃惊的是人类直到19世纪后期才开始对原油和天然气进行现代意义上的使用。此后，伴随贯穿整个20世纪的交通工具的创新，能源消费量迅速膨胀。

尽管有些难以置信，但1946年前，煤炭一直是世界上最主要的能源，此后石油超过煤炭成为第一能源。

如今，新经济体经济持续增长，推动原油需求创出历史新高。

美国人均原油消费量居世界第一，其消费总量约占世界原油总产量的25%；然而，美国消费的大多数能源都是由其自己生产的。

西欧和日本严重依赖原油进口，因为当地的产量无法满足自身对能源的巨大需求。石油储量巨大而石油生产成本低廉的中东产油国，石油消费量也很高。

神秘和迷信的根源

2003年中国超越日本成为世界第二大原油消费国。中国原油消费量以每年15%左右的速度递增。

由于对这些化石燃料的依赖根深蒂固，人们常以为使用化石燃料纯粹是现代社会的产物。其实这种认识并不正确。自有历史记载以来，人类就开始收集由地下渗出的石油，并用它来生火照明。

据史料记载，3000多年前，巴比伦附近就有油井，幼发拉底河的一条支流两岸也发现有油井。考古学家还发现，古代波斯与中国的史料都有关于使用自然状态下的石油来照明的记载。

然而，现代石油和天然气工业的真正起源应归因于古代中国人。

天然气在被人们了解之前，或多或少会被认为是一种很神奇的东西。由地缝里泄出的天然气，经常会被闪电点燃，产生“不灭之火”。几乎所有的早期文明都无法解释这种火，从而构成诸多神话与迷信的根源。

大约公元前800年，古希腊人在德尔福发现这样的火焰。人们将它称作圣火并在其上建造了阿波罗神殿。神殿里住着一位女祭司，被称作德而福神谕者。在不断泄出的天然气的致幻作用下，女祭司会做出种种预言。

如果希腊人对世界的看法更实际一些的话，他们也许会了解，这些奇怪的气体还有一种更好的用途，而古代中国人向我们展示了如何利用这种自然状态下的气体。

开采盐和卤水

盐在中国具有很大的经济价值。大量的盐通常都来自大海，但如果在距海岸千里之遥的四川，获取盐的唯一途径就是打一口盐井。这意味着有时要钻到几百英尺深的岩层以下。

公元前600年，中国人就已经广泛使用铁矿石制成的工具，这比世界其他任何地方都早得多。他们利用这种技术制造出高效的钻井工具。

有时钻井寻盐的结果令人失望，井中没有喷涌而出的卤水，却只有

一些气体溢出。

但他们发现可以用竹管将那种气体导出，用来在大铁锅中生火，加热锅中从其它盐井钻出的卤水，通过蒸馏的方式来制盐。中国的天然气工业就是这样开始的。

公元前一世纪的汉朝，四川人就开始钻井取盐和卤水，并因此钻出了天然气。

四川有一口气井很有名，井深1000多米，1835年时它是世界上最深的井。该地的另一口井，现在每天还产气20000立方米，到目前为止，已累计产气5亿多立方米，依然保持着天然气井产量的世界纪录。

即使盐井里只发现了气却没有盐，当地人也不气馁。他们把长长的竹管套接起来，如过山车般地将天然气接到数英里之外。

19世纪早期，中国共有13000多口气井，天然气产量达300多亿立方米。

中国的独创性

可见，当希腊人还忙于通过闻嗅德而福的天然气来预言未来时，中国人却已经发现了这种将会成为现代社会驱动力的物质。

在这个最具影响力的工程领域，中国比西方早1400年就完美地展现出自己的创造性——也许这才是最令人惊叹的地方。

中国人发明的技术在现代钻井工艺中依然可见，这对中国人早期的创新能力是个有力的证明。比如，钻井工人通过不断跳上跳下一条横木来把钻头打进土里，当时人们把这种做法称作“下撞”，现代石油与天然气工业中依然保留了这种称谓。

英国是现代社会中最先商业化利用天然气的国家。1785年，英国开始利用煤生产燃气，来为家庭和路灯提供照明。美国的巴尔的摩于1816年最先使用燃气为街道提供照明。

19世纪大部分时间，天然气几乎都被用作照明。然而，由于没有相应的管道设施，很难远距离输送燃气。随着电的发明，燃气照明逐渐被电取代，气的产量也逐渐下降了。

这样，对于1950年前发现的天然气，人们通常是任由其排入大气，如果气是在钻油过程中发现的，通常是对其进行燃烧处理。

然而，二战后焊接技术、冶炼技术及铸管技术的进步使得制造质量可靠的输气管道成为可能，并因此引发了管道建设的热潮，全球涌现出几千英里的输气管道。

一旦天然气输送被证明可行，其新用途也应运而生，天然气被用来给家庭供暖，给水加热，为制造及加工业提供动力，还被用来发电。

曾被当作石油业废品的天然气，摇身一变成为重要的清洁能源。然而，2000多年前古代中国人就已知晓天然气的这种功能。

为什么古代中国人在科技方面、在钻井和使用石油及天然气方面比其他国家领先如此之多？

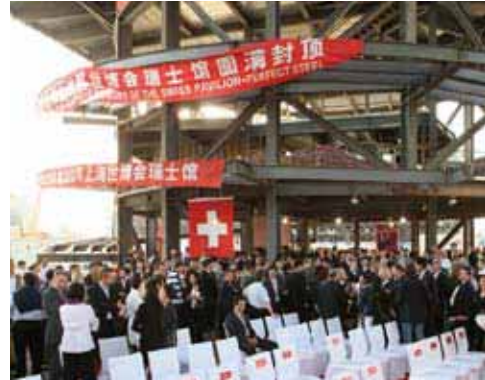
您可以在电视系列片《源·探索中国》中找到完整的答案。这部高清文献电视系列片共两集，每集60分钟，它把观众带上发现之旅，探寻为什么中国文明不仅经受住了时间的考验，而且还对现代世界的早期科技发展产生了可能是最为重要的影响。

《源·探索中国》由摩科瑞MCG香港有限公司(隶属摩科瑞能源贸易公司)制作，将于2009年全球发行。

Inspiring Yin and Yang

Roofing Ceremony at the Swiss EXPO Pavilion with Federal Councillor Widmer-Schlumpf

By Shao Dahai (Swissinfo) and Presence Switzerland



Federal Councillor Eveline Widmer-Schlumpf, Head of the Swiss Federal Department of Justice and Police (EJPD), was guest of honour at the roofing ceremony at the Swiss Pavilion EXPO 2010 Shanghai on October 23rd as part of her visit to China. The official celebration was also attended by Mr. Huang Jianzhi, Deputy Director General, Bureau of Shanghai World Expo Coordination. More than two hundred invited guests were present at the roofing ceremony, including a delegation from the Swiss Federal Parliament, led by National Councillor Bruno Zuppiger.

Rural and urban areas: Close interaction

In her speech at the roofing ceremony, Federal Councillor Widmer-Schlumpf stressed the importance of EXPO 2010's theme of "Better City, Better Life" against the background of the challenge of achieving sustainable urban development. In her remarks, the Head of the Swiss Federal Department of Justice and Police also had something to say about the EXPO sub-theme of "Rural – Urban Interaction", which is the subject dealt with in the Swiss pavilion: "The Swiss are strongly aware of the benefits of a close interaction between rural and urban areas. This is natural, as Switzerland is small, mountainous and densely inhabited and has a solid rural tradition alongside thriving cities. We have the duty to find sustainable ways of protecting and conserving our natural heritage - while improving living conditions in urban areas", Widmer-Schlumpf said.

The architecture of the Swiss Pavilion, which has been created under the project management of the Federal Department of Foreign Affairs FDFA, Presence Switzerland, constitutes a hybrid between hi-tech and nature, uniting town and country and maintaining the equilibrium between them. An interactive exhibition inside the pavilion presents the innovativeness of the Swiss and displays a number of positive examples of the interaction between town and country in

Switzerland. The pavilion visit will finish on a high with a four-minute ride on the chairlift up to the roof of the Swiss Pavilion – a bridging element, bringing town and country together.

Hi-tech and pure nature

Mr. Andreas Bründler, the architect of the Swiss Pavilion, told The Bridge that his inspiration came from the traditional Chinese balance concept Yin and Yang, which completely explains the Pavilion's theme "Rural – Urban Interaction". The town and country opposite and complete each other, and form the balance between society and nature. Back in 2006, Buchner Bründler Architects and Element GmbH with their innovative concept for the Pavilion stand out among the competition and won the design and construction rights of the Swiss Expo Pavilion.

The completion on schedule of the basic steel structure represents the conclusion of a further building phase for the Swiss Pavilion. In the course of recent months, some 780 tonnes of steel and 600 cubic metres of concrete have been incorporated in the structure covering an overall surface area of 4000 square metres. A total of 132 piles have been driven into the ground to form the foundation for the gigantic steel structure, which is going to have to bear the load of an expected flow of 15 000 visitors per day.

Swiss Pavilion

EXPO 2010 is taking place in Shanghai from 1 May to 31 October 2010. It is going to be the biggest world exhibition ever held, covering a surface area of 5.28 square kilometres and is expecting to have 70 million visitors pass through its gates. The Swiss Pavilion offers the opportunity to Swiss companies as well as the country's cantons and towns to use the space available in it for presenting themselves. www.swisspavilion.ch

Chamber News 商会新闻

1 June 25, 2009 – Young Professional's Forum: "Top Companies' Approach to Leadership"

SwissCham Beijing organized its third YPF at the Crown Plaza Sun Palace. The event was generously sponsored by Tsinghua INSEAD EMBA Program. Around 120 young professionals had the rare opportunity to meet two top level executives and learn from their personal experiences. Mr. Jun WANG from Oerlikon and Mr. Patrice BULA from Nestlé shared their views on what leadership is and what is needed to become a future leader. After the speech, a discussion and Q&A session took place, moderated by Mr. LAEUPPI, Director at SwissCham. The evening continued at the bar around a buffet of exquisite finger food.



Urs LAEUPPI (Director of SwissCham), WANG Jun (President, Oerlikon China); Patrice BULA (Chairman and CEO, Nestlé China, Head of Nestlé in the Greater China Region)

**2 July 6 and 8, 2009 – Committee Members' Meeting**

SwissCham Beijing launched its first Committee Roundtable with the Bank/Finance/Insurance Committee on July 6 and with the Trade/Retail/Services Committee on July 8 at the Raffles Hotel. This gave members the opportunity to have a first discussion on industry-related issues or problems and to come up with a list of tasks to be implemented with the help of the Chamber.

3 July 9, 2009 – China's New Tax Rules for Corporate Restructuring

SwissCham Beijing and EUCCC organized this afternoon seminar at the Kempinski Hotel Beijing. The speakers Fuli CAO and Ying XIONG, from Jones Day and Schneider Electric respectively, introduced new tax rules for Enterprise Reorganizations and Anti-avoidance in M&A & investment structuring. A total of 30 people attended this seminar, which was followed by an enthusiastic Q&A session.

4 July 29, 2009 – Summer Networking

SwissCham Beijing in cooperation with AustCham, BritCham, the Dutch Chinese Chamber of Commerce, the China-Italy Chamber of Commerce and MayCham organized this successful summer networking at Swissôtel with an attendance of more than 200 people. This gave participants an opportunity to network, exchange contacts and meet the Chambers' staff.

**5 August 1, 2009 – Swiss National Day Celebration**

SwissCham Beijing supported this national celebration organized by Swiss Society Beijing. Everybody solemnly stood up and listened to the recorded speech of Swiss President Hans-Rudolf MERZ. Krystyna MARTY, Minister of the Embassy of Switzerland, briefed the audience on this year's events and made her best wishes to all the Swiss Community in Beijing. The 200 participants were not discouraged by the rain that started in the middle of the day and enjoyed the Swissôtel ballroom where a buffet of typical Swiss food and barbecue was served.

**6 August 27, 2009 – Inter-Chamber Networking**

SwissCham Beijing, the European Union Chamber of Commerce, the Benelux Chamber of Commerce and the French Chamber of Commerce and Industry jointly organized the Inter-Chamber networking evening at the rooftop Beach Bar of Block 8, the most talked-about summer venue. Participants met, exchanged information, and talked business in a relaxed, informal atmosphere.



Alexandre SOFIA, Alex ZHANG, Adeline GENG, Jeyanthi GEYMEIER, MENG Lei: SwissCham Beijing



Sergio SCANU from Chioment Studio Legale (middle) with his friends



Daniel ARBENZ from Crowne Plaza Sun Palace (left)



ZHANG Zonghui (middle) and Cindy JIANG (right) from LEM

7 September 8, 2009 – Making Payment Overseas: An Introduction to Withholding Obligations and Procedures

SwissCham Beijing in cooperation with the European Chamber of Commerce, the French Chamber of Commerce and the Israel Chamber of Commerce were the organizers of this breakfast seminar. Participants gained knowledge in local tax and foreign exchange regulations by listening to KPMG speaker, Tracy ZHANG, PRC regulatory and tax expert on China investment related issues' leader of the FS tax teams in KPMG Beijing, looking after banking, insurance, securities companies and real estate funds.

8 September 17, 2009 – Green Technologies in China

This breakfast seminar organized by SwissCham and the Canadian Chamber and supported by China-Australia Chamber and BenCham, was generously sponsored by T-Systems. The seminar focused the discussion on clean energy and on technology revolutions in other industries, like IT and biotech. The speakers addressed the issue under three different angles: how Green ICT can help stopping IT sector's CO2 emissions; how green energy and engineering such as solar energy, underground water conveyance and recycling, and eco-friendly building structures and materials can help build an eco-city; how to save costs, meet corporate policy goals, reduce emissions and positively impact one's local region and environment with renewable biomass energy solutions for industries. SwissCham specially wants to thank Frederic GILLANT from T-Systems, YANG Liu from Sino-Singapore Tianjin Eco-city Administrative Committee and Darrell BARNES from ClearWorld Fuels for sharing their knowledge on environmental friendly techniques and solutions.



Frederic GILLANT from T-Systems answering questions



9 September 22, 2009 – International Networking Night

Eighteen foreign Chambers of Commerce in Beijing united to host the city's biggest inter-chamber networking this autumn. Guests from all around the world gathered outdoors at the beautiful St. Regis hotel courtyard and spent a late summer night making new acquaintances among the 800 people who attended.

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Events Review 活动要闻

1 June 10th, 2009 - Sourcing Event

How can a company find a reliable and cost-effective supplier who also ensures good quality of products? Especially in times of financial and economic insecurity, the answer to this question can represent an important advantage in competitiveness. Three designated speakers presented answers and practical solutions: Mr. Martin Kuehl, Chief Representative of the German Association Materials Management, Purchasing and Logistics, Ms. Helena Shen, Head of Strategic Sourcing AP at Schindler Management Asia Pacific Ltd. and Mr. Michael Pothier, Global Sourcing Purchaser of Bobst Shanghai Ltd. The event took place at Portman Ritz Carlton hotel.



Andre Pometta (Firmenich and SwissCham SHA Board Member) with Mr. Martin Kuehl (BME)



Helena Shen (Schindler)

2 August 20th, 2009 - Young Professional Gathering

The guest speaker of this event was Mr. Stephan Schwaiger, General Manager of Shanghai SR Aircraft Technics. He shared his extensive knowledge about his industry and his experiences in China, especially from the point of view of a joint venture company. Moreover, he presented key points and difficulties when providing customized maintenance and quality services on the Chinese Market.



Speaker Stephan Schwaiger (SR Aircraft Technics)



Socializing Young Professionals

3 September 2nd, 2009 - Young Professional Event - Visit of the Swiss Pavilion

What splendid weather for a first construction site visit of the Swiss Pavilion at the World Expo 2010 for SwissCham members! Mr. August Keller, Senior Project Manager at Nüssli, presented the concept and spoke about the encountered challenges during the realization. Later on during the visit and aperitif at Paulaner, the Young Professionals also shared their experiences with a group of students of the University of St-Gallen who attended a module (Law and Business in China) in Shanghai as part of their Executive Master of Business Law degree.



August Keller of Nüssli during his speech.



From left: Michael Lehmann (SIM), Thomas Schneider (Swiss Deputy Consul General), August Keller (Nüssli), Nathan Kaiser.



Field visit on the construction site.

4 September 10th, 2009 - 13th CFO Round-table

Ten Chief Financial Officers gathered at Grand Hyatt Hotel and listened to the presentation about "fraud detection and prevention" held by Mr. Emmanuel Vignal of Deloitte Forensic & Dispute Services.



From left: Emmanuel Vignal (Deloitte) and Michelle Chua (Deloitte), Bruno Furrer (Panalpina), Kaspar Probst (Givaudan) and Michael Lee (Roche)

5 September 17th, 2009 - Young Professional Event - Visit of Baldor Electric Factory

SwissCham's Young Professional had the chance to visit the brand new factory of Baldor Electric. During the visit and the following discussion with Mr. Daniel Berg, Managing Director Asia-Pacific of Baldor Electric, the participants learned about particularities of selling high-end energy-efficient industrial motors in China.



Daniel Berg (Baldor)



Participants listening to Daniel Berg (Baldor).

6 September 24th, 2009 - Consular Briefing

At the Swissôtel, the Swiss Consul General to Shanghai, Mr. William Frei, welcomed representatives of the Swiss community as well as friends of Switzerland on the occasion of the annual Consular Briefing. He provided an overview on recent exchanges and events concerning the bilateral relations between Switzerland and China. Mr. Frei also shared his belief that the Swiss government overall responded well to the global economic crisis, particularly in UBS matters. The speech was followed by a brief Q&A session and a buffet dinner.



From Left: Christian Guertler (President SwissCham Shanghai) with William Frei (Swiss Consul General).



7 October 15th, 2009 - Evening with Edgar Oehler

SwissCham Shanghai proudly welcomed Mr. Edgar Oehler, former Swiss political heavyweight and CEO of the Arbonia Foster Grouo (AFG) at Longemont hotel. More than 50 SwissCham members listened to Mr. Oehler who addressed the challenges that multinational companies encounter during the current economic crisis. He also shared his view on key success factors in these difficult times. After a vivid Q&A session the participants enjoyed a pleasant evening with dinner and networking.



From left: Andreas Nydegger (Netstal), Heinz D'Arsie (Lenzlinger), Stefan Hotz (Sika Sarnaphil), Edgar Oehler (AFG).



From left: Reto Tomasini (Mannhart Consultants), Felix Aeppli (AFG), Christian Guertler (SwissCham SHA)



Kevin Doherty (DeVere)

8 October 18-25th - Swiss Week

120 musicians of the Swiss Brass Band "The Landwehr" (from Fribourg) in their traditional uniforms on Wujiang Lu with thousands of spectators applauding! That was just an amazing parade to open the first Swiss Week in Shanghai, which is a series of Switzerland related events organized by SwissCham Shanghai. During the opening day of the Swiss Week, visitors had the opportunity to learn more about Switzerland and Swiss companies by visiting several booths along Wujiang Lu. During the following week the participating organizations have showed in a host of events the many facets of Swiss arts and culture, innovation and education, Design and Music.

The Swiss Week has been initiated by SwissCham Shanghai in cooperation with the Consulate General of Switzerland in Shanghai to promote Switzerland, Swiss companies and organizations in China. Big thanks go to Consulate General of Switzerland in Shanghai, Swissnex, Swiss Tourism, Pro Helvetia, Presence Switzerland, Swiss Center Shanghai, Swiss International Airlines, Fribourg Development Agency, City of Basel Promotion, Mineralquelle Gontenbad, and many others. As a highlight of this Swiss Week, Federal Councillor Eveline Widmer-Schlumpf, Head of the Swiss Federal Department of Justice and Police (EJPD), was guest of honour at the roofing ceremony at the Swiss Pavilion EXPO 2010 Shanghai as part of her visit to China. More than two hundred invited guests were present at the roofing ceremony.



From right: Christian Guertler (President SwissCham Shanghai), Lu Xiao Dong (Vice-Governor of Jingan District), William Frei (Swiss Consul General), Andre Liaudat (President of Landwehr) and a musician.



Landwehr parading at Wujiang Lu



Chinese spectators greatly receive the Swiss Brass Band.



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Events Review 活动要闻

1 June 4, 2009/July 2, 2009/August 6, 2009/September 3, 2009 – Monthly Young Professional Cocktail

Swiss Young Professionals and friends usually meet for a casual after-work cocktail in Delaney's Pub in Wanchai. During the summer, two special venues were chosen: Anchor's Point in Soho and 2121 in Lan Kwai Fong. These events attract over 50 young executives to mingle and network in an informal ambience.



The Hong Kong Council of Social Service played a major part in the creation and operation of the Caring Company Scheme. At this monthly luncheon, Mr Choi shared his insight on Corporate Social Responsibility in the business world and gave numerous examples of successful stories with his many years of experience with the scheme.



(Left to Right) Patrina Chow of Clyde & Co, Choi Kim Wah (Speaker) and Vivian Yeung of Panalpina

3 June 17, 2009 - Joint Chamber Lunch with Ben Simpfendorfer

The global economy currently faces its greatest economic crisis and the East is rising to challenge the economic-dominance of the West. Mr. Ben Simpfendorfer, one of the world's leading experts on relations between China and the Middle East, shared his view on the rise of the \$10,000 billion Silk Road economy. He addressed the rapid development of trade and investment links between China and the Middle East and examined the importance of oil and Islam to the Silk Road economy.



Ben Simpfendorfer (Speaker)



Members and their friends of various industries enjoy the networking evenings.

2 June 1, 2009 – Monthly Luncheon with the Swiss Association of Hong Kong
Mr Choi Kim Wah, Business Director of

Participants enjoy the networking and Luncheon at the Hong Kong Banker's Club.

**4 June 18, 2009 – Joint Chamber Breakfast Seminar with Adidas**

Adidas' Asia Vision 2008 resulted from the 1998 Japan milestone. During this breakfast seminar, Christophe Bezu, Senior Vice President and Head of Region Asia Pacific of Adidas, presented this plan and how it has been implemented in Asia.

5 June 18, 2009 - InterCham Connection People Cocktail

This cocktail was co-hosted by Swiss Chamber Hong Kong and 27 international chambers and business associations. This "all ages" cocktail was held on June 18 at The Jockey Club. It was attended by over 400 participants. This event created a networking opportunity for members while supporting a worthwhile cause. Net proceeds go to the Mother's Choice, which is a charity organization.



Exciting lucky draw

6 July 27, 2009 - Young Professional Junk Trip

Busy Swiss Young Professionals spent a whole Sunday relaxing on a junk trip. The junk was sponsored by Santa Fe and the trip was organized by young professionals Jeannette Goeldi and Patrick von Deschwanden.

After boarding the junk in Aberdeen, participants enjoyed a Boat ride to "Po Tai Island" which is located 3 km off the southeastern tip of Hong Kong Island. The Island is famous for its ancient rock carvings and stunning view. After spending some time on Po Tai exploring the island passing by ruined buildings (Ghost

House) and stroll around the fascinating rocks, participants headed towards a nice swimming spot for swimming and lunch.

7 August 1, 2009 – Swiss National Day Celebration Dinner

In celebration of the Swiss National Day, Swiss Association organized a Swiss National Day Celebration Dinner on August 1, 2009 at The Hong Kong Jockey Club. The Swiss Chamber Hong Kong and the Consulate General of Switzerland actively involved in organizing this event to make it successful. More than 200 members of the Swiss community together with their friends attended the dinner as well as late drinks afterwards. A lucky draw was held and many participants won fabulous prizes and proceeds will go to a charity organization. Everyone had an enjoyable and memorable evening.



Stefan Basler, President of the Swiss Association



(Left to Right) Serge G. Fafalen, President of the SwissCham Hong Kong, Hans J. Roth, Consul General of Switzerland in Hong Kong and Anne-Marie Mueller



(Left to Right) Iris Tsang and Helen Cheng of EC21 Language and Communication Solutions Ltd.

8 August 13, 2009 - 40th International Chamber Young Professional Cocktail

This International Chamber Young Professional Cocktail was co-organized by Swiss Chamber Hong Kong. It was held on August 13 at Duetto. This event created a networking opportunity for members of the 27 International Chambers to connect in an informal cocktail setting, while supporting a worthwhile cause. Net proceeds go to the Intercham Scholarship Fund. Participants enjoyed the networking evening as well as winning some attractive lucky draw prizes.

9 September 7, 2009 – Monthly Luceon with the Swiss Association of Hong Kong

Swiss National, Mr. Daniel J.C. Grimm, Director of QOS Asia Pacific Ltd (Quality Optimizing Services) is an expert in food production, consulting, inspecting and auditing food suppliers. He made a presentation on “vitamins and fertilizer – food safety for breakfast, lunch and dinner”, sharing his experiences and methods to ensure daily food quality.



Stefan Basler, President of Swiss Association (Left) and Daniel J.C. Grimm (Speaker)



Peter Spirig (Left) and Robert Lagorio (Right)

10 September 8, 2009 – Swiss Chamber Cocktail

The Swiss Chamber Cocktail for new and existing members was held at the prestigious night club M1NT on September 8. Over 40 members attended to meet with the committee of the Swiss Chamber

Hong Kong. Participants enjoyed the relaxing networking environment as well as the chocolates sponsored by Ms. Cornelia Maeder of Francesca Chocolate.



Cornelia Maeder of Francesca Chocolate (Left) and Galina Lui of SwissCham (Right)



Participants receive some goodies from Francesca Chocolate.



(Left to Right) James So of C.M. So & Co., Certified Public Accountants and Patrick Trainor of Asiatic Trust Hong Kong Ltd.

Upcoming Events 活动预告

• **Joint Monthly Luncheons with the Swiss Association of Hong Kong** are usually held on the first Monday of each month. For details of events, please contact Ms. Irene Lo
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• **Young Professional after-work cocktail**

Welcome to our monthly Young Professional after-work cocktail with good old friends and nice new faces! The Swiss Young Professionals and their friends meet for a casual after-work cocktail every first Thursday of the month. If interested kindly contact Benjamin Mueller-Rappard
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