

## Swatch Group China CEO Susan Chen

Winner of the 3<sup>rd</sup> SwissCham  
CEO-Award 2010

## 斯沃琪集团中国CEO Susan Chen

2010年中国瑞士商会“第三届年度最佳  
首席执行官奖”获得者 Susan Chen

# “One Country – Four Markets” “一个国家，四个市场”

Exclusive Results of SwissCham Survey on R&D and Innovation  
瑞士商会的研发和创新专访

Andreas Tschirky, Head R&D Roche China: “Major Paradigm Shift Towards East”  
Andreas Tschirky, 罗氏中国研发总裁: “主要创新向东方转移”

Understanding China's Wealthy  
解读中国的富裕消费群体

Claudio Mazzucchelli of OSEC: “As Long as We Help, it's a Success”  
瑞士投资促进署 Claudio Mazzucchelli: “只要我们对企业有帮助，那就是成功”

# The BRIDGE

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EXPO 2010 SHANGHAI

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- + Provide practical guidance to visitors in Shanghai
- + Provide interesting Expo information and background stories
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- + Provide an overview on the Swiss (business) contribution to the Expo
- + Listing of SwissCham Shanghai members and other Swiss companies/institutions in Shanghai

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  - + Swiss tourists in SHA
  - + China-interested Swiss individuals in Switzerland
  - + Chinese Government Officials
- 
- + Visitors of the Swiss Expo Pavilion (hand-out in VIP section)
  - + Swiss and Chinese media
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  - + Members of Swiss Chinese Chamber of Commerce Switzerland
  - + Swiss media
  - + 5 stars hotels in Shanghai, Beijing and Hong Kong
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### Dear Readers

We are looking back on a challenging year with many of us being affected by the the global economic downturn and particularly the export sector. Even though China was only "slightly" or less affected by this heavy crisis, all of us had to realize, how sensitive today's economic systems react to changes and instability of global financial systems and institutions.

2010 is the "Year of the Tiger". The tiger reflects power and energy. That's what the economy needs and early economic indicators show in to the right direction South China's Pearl River Delta (PRD) is one of the major industrial production hubs in China. It looks back on more than 130 years of tradition in international trade and commerce. Guangdong is today's leading place for China's electronic product manufacturing. Shenzhen is often called the Silicon Valley of China. Eighty percent of the globally sold flat screen TVs are produced in the PRD! The automotive business in Guangzhou includes three of the biggest Japanese car makers. BYD Shenzhen shows the possibilities in China and the PRD, by turning from a "no-name" in the automotive field - in less than 10 years - into one of the top 5 of the Chinese car sales charts! Hong Kong and the PRD continuously maintain its "hand in hand" success story. In the difficult year 2009, many companies were closed; but on the other hand, even more new enterprises opened a new investment in the continuously booming PRD. China is the host of the 2010 World Expo. In summer the Asian Sports Games, also known as the Asian Olympics, will take place in Guangzhou. The tiger year shows its powerful teeth and will make things happen, turning words into action and results!

I wish you Gong Xi Fai Cai, Kung Hei Fat Choy and a Happy Chinese New Year!

Urs Calonder

### 亲爱的读者朋友们:

过去的一年对于许多人来说都是十分艰苦的一年，全球性经济衰退给各个行业都带来了深远的影响，尤其是那些出口导向型企业。尽管中国在此次严重的金融危机中所受影响相对较小，但是我们每个人都应该意识到，当前的经济体系对全球金融体系和机构的变化和不稳定的反应是十分敏锐的。

2010年是中国的虎年。老虎代表着力量和能量，这种力量和能量正是当前的经济所需要的，也是各行业在开年伊始即体现出来的发展特征！

积极创造的心态是扭转经济增长、从危机中恢复所必需的，我们相信中国旧历年虎年所蕴含的精神将是增长和成功的关键。

位于中国南部的珠江三角洲地区是中国的主要工业生产基地之一，它拥有130多年的国际贸易与商业历史。广东是当前中国电子产品生产领域的领先省份，深圳则被称为中国的硅谷，此外，全球8%的纯平电视都是在珠江三角洲地区制造生产的！广州的汽车业引入了日本三大汽车制造商，深圳的比亚迪从一个不知名的汽车品牌，在不到十年的时间里发展成为中国汽车销售额排名前5名的水平，这充分彰显了中国以及珠江三角洲地区所蕴含的巨大商机。

香港与珠江三角洲地区在经济上总是联系在一起。在艰难的2009年，当许多企业被迫倒闭时，更多的新型投资却注入了不断繁荣的珠江三角洲地区。

中国不但是2010年世博会的主办方，亚运会也将于今年夏天在广州举行。虎年的威力已经开始展现，它会不断将我们的规划转化为行动和成果！

恭喜发财，新年快乐！

Urs Calonder



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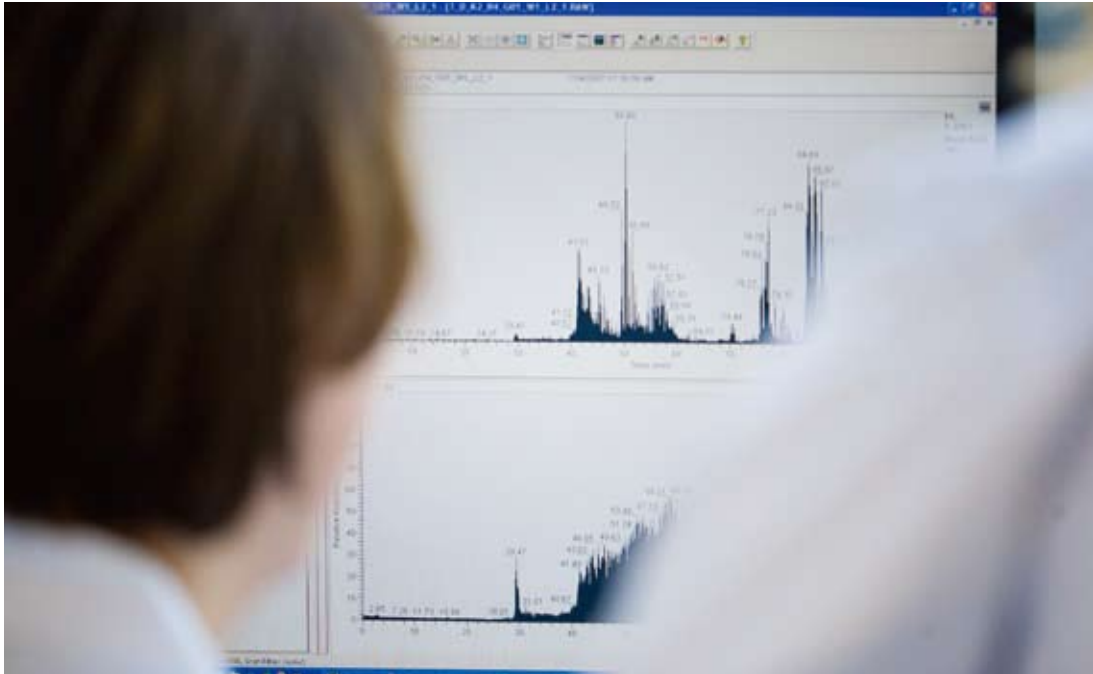




# Favorable R&D Environment

## Innovation «Made in China» on the rise, as SwissCham survey results show

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



In the next 2-5 years, 69% of the SwissCham survey participants will do R&D in China

When SwissCham Shanghai conducted its “Business Sentiment Survey 2010”, a big part of the questions was dedicated to China as a potential future hub for innovation. We were particularly interested to know more about the Swiss business leaders’ views on having (or not having) research and development (R&D) related activities in China. How many are already doing R&D? Do the others have intentions to set up R&D facilities anytime soon? What are the expected benefits? Is saving money the main motivation driver? Do the results live up to the expectations? Is the Intellectual Property Rights (IPR) protection sufficient, or are the risks to lose IP considered too big? Here comes an exclusive overview on the most interesting findings:

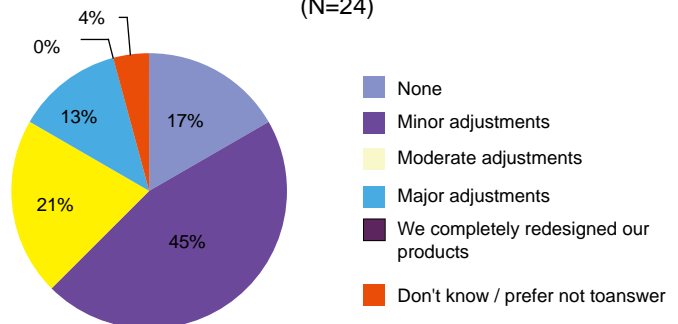
### 1 Have your products needed a lot of adjustments to enter the Chinese market?

17% of the survey participants did not do any adjustments and a full 80% out of the 24 participants adapted their products to the Chinese market. However, 21% have only done moderate changes and 46% just had minor adjustments.

**Comment:** These figures show that product adjustments are clearly needed to succeed in China.

### Have You Adjusted Your Products to Enter the Chinese Market?

(N=24)



### 2 Regardless of where your R&D actually takes place, how important is R&D for your company to sell your products on the Chinese market?

For more than 75% of the survey participants, R&D is important - or very important, where 19% say it is even of key importance to sell their products in China.

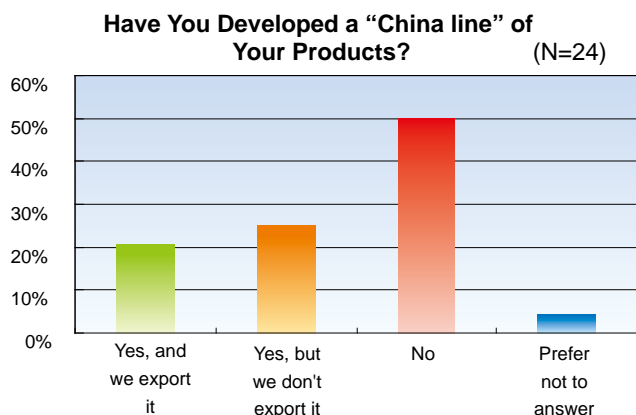
### 3 Have you developed a “China line” of your products which is cheaper, with localized parts and/or

**specifications, etc?**

Yes, and we export it: 21%

Yes, but we don't export it: 25%

No: 50%

**4 What are your current R&D activities in China?**

32% of 28 participants are doing R&D in China; another 14% are currently in the process of establishing R&D activities or an R&D center in China. 21% are not doing any but planning to establish R&D activities in China in the next 2-5 years. 21% are not doing any and are not planning to do R&D in China within 2-5 years.

**Comment:** 69% will do R&D in the next 2-5 years

**5 How important are the following reasons for having opened or planning to open an R&D unit or center in China?**

**Benefit from lower cost:** More than 50% of the participants admit R&D costs are lower compared to other countries where they have R&D sites. But interestingly, 58% of the participants do not put that much weight on it. As a matter of fact, most say it is of no - or only of somewhat - importance to them. For a minority of 37%, the cost advantage is important or very important.

**Access to huge talent pool:** This is of no - or little importance - for almost 50% which suggests that their innovation is (still) mainly crafted by imported knowledge. For only around 5% is access to the growing Chinese talent pool of key importance. This varies from industry to industry and certainly does not apply to the pharmaceutical industry; as Andreas Tschirky, Head of Roche R&D, tells The Bridge. "The reason we are in China is talent first, talent second and talent as a third priority", he says. (see interview on page 12)

**Better company image towards government:** Our survey results show a mixed picture. Half of the respondents claim the strengthening of the company image to the Chinese government and the prospect of obtaining more support for the group from the government is, indeed, an important - or very important or crucial - factor why there are in China. The other half claims the opposite.

**Easier communication:** No clear trend in this field. But slightly more than 50% say that the resolution of communication problems (between R&D in Europe and the Chinese production units) is an important - or very important or crucial - motive. However, almost as many say it is of no - or only some importance - for their business.

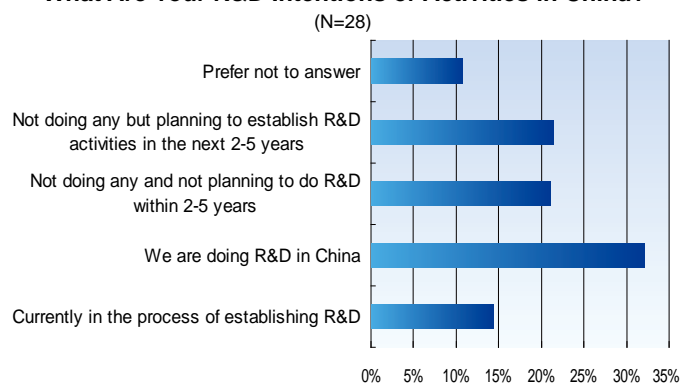
**Comment:** The prospect of lower costs is not a key factor for Swiss businessmen for setting up R&D activities in China. Neither are: access to talents, a better image or easier communication.

**6 So what are the most important or even crucial motivation drivers for having opened or planning to open an R&D unit or center in China?**

Our survey clearly reveals the following three reasons: First is being close to suppliers. This allows for a better ability to develop or re-engineer products. Equally important is being close to clients. This allows being able to better adapt products to the Chinese market. For a full 37%, the closeness to clients is even of key importance. Third reason is the speed to market new products in order to be as fast as the local competition.

**7 For what market or region are or will your R&D activities be for?**

More than 80% are exporting to other regions in Asia or to the global markets. Only 16% produce for the Chinese market exclusively.

**What Are Your R&D Intentions or Activities in China?**

**Comment:** China is underway to becoming a more and more important global R&D location.

**8 What type of R&D are you currently doing or are you planning to do in China?**

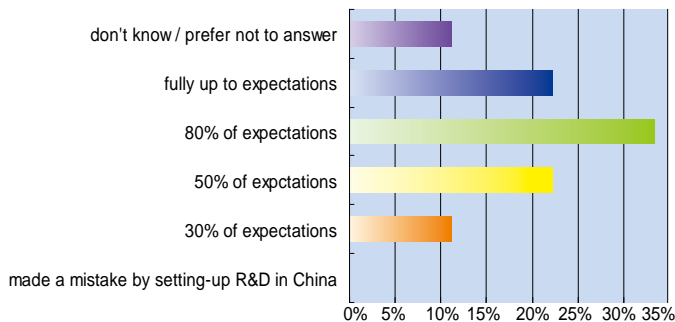
Fundamental research and applied research are of inferior importance. Almost 90% of those doing R&D in China focus on product and technology development, as well as product and technology improvement.

**Why do you do R&D in China (or plan to open R&D unit)?**

## 9 How do your R&D activities meet your initial expectations?

We made a mistake by setting-up R&D in China: 0%  
 Meeting 30% of expectations: 11%  
 Meeting 50% of expectations: 22%  
 Meeting 80% of expectations: 33%  
 Fully up to expectations: only 22%

**How do Your R&D Activities Meet Your Initial Expectations?**  
 (N=9)



**Comment:** There is a significant discrepancy between foreign expectations and the survey outcome which indicates at what (early) stage of becoming an innovation hub China still is in.

## 10 Miscellaneous findings:

**R&D intensity:** 60% of the survey participants spend between 5-10% of their China turnover in R&D activities in China.

**R&D intensity:** A very high 78% plan to expand their R&D activities in the next 2-5 years. 22% plan to remain at the current level. Nobody wants to lower or even stop the R&D intensity in China.

**Lack of government support:** Only about a third of the respondents feel well supported by the government. A high 55% do not feel such R&D related government support.

**Below expectation:** More than 50% say that the speed of their suppliers and the speed of development are not up to their expectations.

**IP situation:** The IP protection (at the Human Resources level) is causing us a lot of trouble: Only 11% agree and 0% strongly agrees.

**Network:** Institutional links are difficult to establish. Only 33% say these links are easily established.

**Network:** Two thirds have built up links between their R&D activities and governmental organization or other PRI (public research institutes) but only 66% of those who have established such links consider them as very useful.



Schweizerische Eidgenossenschaft  
 Confédération suisse  
 Confederazione Svizzera  
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Embassy of Switzerland  
**Swiss Business Hub China**

## HAVING PROBLEMS FINDING YOUR WAY IN CHINA?



## THE SWISS BUSINESS HUB CHINA

is located on the grounds of the Swiss embassy and consulates, is a network partner of OSEC Business Network Switzerland as well as the official authority for Swiss trade promotion in China. The goal of the Hub is to help strengthen business relations of Swiss SMEs with China through:

- Market and product analysis
- Local company background checks
- Search of distributors, representatives and import partners
- Individual consulting and coaching of SMEs
- Reports on presentations and trade fairs in various Chinese cities
- Organization of events and fact finding missions for Swiss companies
- Finding the right local partner for company set-up as well as legal and tax issues

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# 有利的研发环境

## 创新正在中国崛起

撰文：方必安 调查：Alain Kaiser



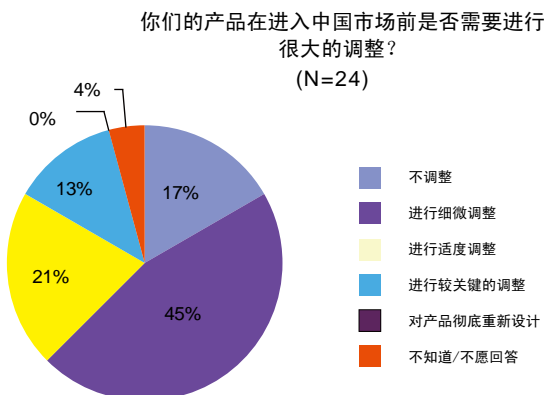
69%的受访者表示未来2-5年里会在中国开展研发活动

中国瑞士商会上海分会在进行“2010年商业信心指数调查”中，许多问题都涉及到中国将可能成为未来的创新中心。我们对瑞士企业家选择在华进行研发活动的观点十分感兴趣，比如有多少企业已经在中国设立了研发中心？其他企业在不久的将来也会在中国设立研发中心吗？在中国设立研发中心的有利条件有哪些？低成本是主要的推动力吗？研发成果能够达到预期吗？中国对知识产权有没有足够的保护还是企业认为在中国的知识产权风险太大？以下是我们的主要发现：

### 1 你们的产品在进入中国市场前是否需要进行很大的调整？

17%的受访者表示不对产品进行调整，24位受访者中的80%对产品进行了调整以适应中国市场。不过，其中21%的受访者对产品进行了适度调整，46%的受访者只对产品进行了细微的调整。

评论：这些数据表明要成功地打入中国市场，对产品进行调整是十分必要的。



### 2 如果不考虑研发中心的所在地的话，研发对产品在中国市场销售的重要性有多大？

超过75%的受访者认为研发重要，或十分重要，19%的受访者表示研发对产品在中国市场的销售至关重要。

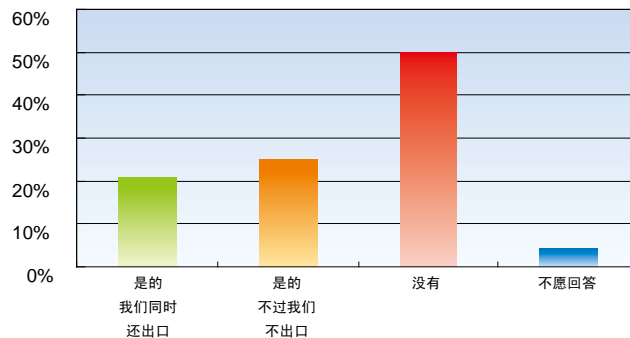
### 3 你们是否在中国设立了成本较低的产品“生产线”，并采用本地的零部件和/或技术参数呢？

是的，我们同时还出口：21%

是的，不过我们不出口：25%

没有：50%

你们是否在中国设立了成本较低的产品“生产线”，并采用本地的零部件和/或技术参数呢？(N=24)



### 4 你们目前在中国的研发活动有哪些？

28位受访者中的32%表示正在中国进行研发活动，14%正在中国建立研发项目或研发中心，还有21%表示目前在中国还没有研发活动，不

过计划未来2-5年里进入该领域。21%的受访者表示目前在中国没有研发活动，未来2-5年也不打算进入。

**评论：**69%的受访者表示未来2-5年里会在中国开展研发活动。

## 5 以下因素对你们已经在华开展或计划开展研发的影响有多大？

**受益于低成本：**50%的受访者承认中国的研发成本比他们所在的其他地区要低，不过，58%的受访者并不认为这一因素很重要。事实上，大多数受访者表示低成本并不是他们选择中国的重要原因。只有37%的受访者表示，成本优势对他们很重要。

**获得大量的人才：**约50%的受访者认为这个因素对他们决定在中国开设研发中心并不太重要，这表明他们的创新主要还是通过从国外引进人才进行的。约5%的受访者认为中国不断壮大的人才库对他们的研发工作十分重要。在这一点上各个行业有所不同，尤其是制药行业；正如罗氏研发有限公司的研发总裁Andreas Tschirky所说的：“我们来到中国的动机首先是人才，其次是人才，最后还是人才”。（见第15页访谈）

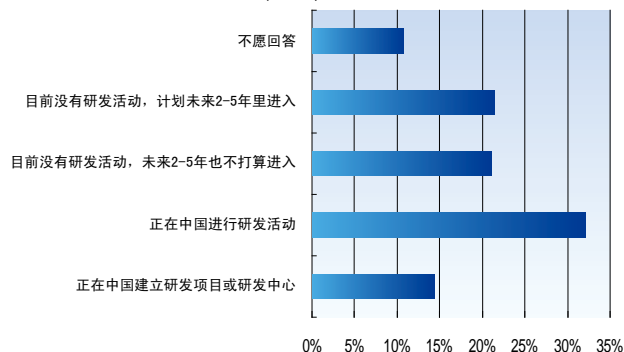
**树立企业形象：**在这一点上我们的调查结果是比较复杂。约半数的受访者表示加强企业在中国政府方面的形象，以及从政府获得更多的支持是他们将研发引入中国的重要、很重要或至关重要的原因。而另一半受访者则表达了完全相反的观点。

**便于沟通：**受访者在这一点上没有明确的趋势。略超半数的受访者表示解决（欧洲研发中心与中国生产线）沟通的问题是重要、很重要或至关重要的动机。不过，另一半受访者则认为这一点并不重要。

**评论：**低成本并不是瑞士企业选择在华开展研发活动的重要原因，同时，获得人才、企业形象以及沟通都不是重要原因。

你们目前在中国的研发活动有哪些？

(N=28)

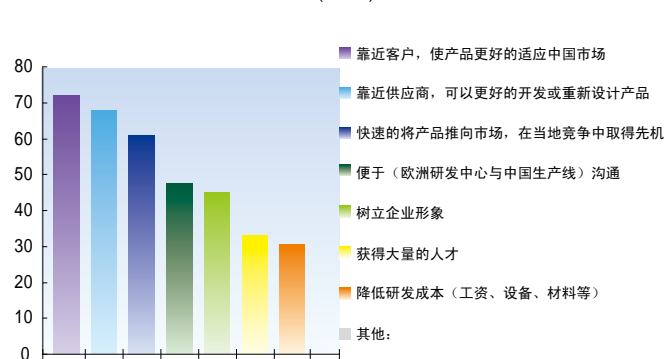


## 6 选择或计划在中国设立研发中心的最重要或最至关重要的动机是什么？

我们的调查显示为以下三个原因：首先是接近供应商。这可以帮助企业更好的开发或重新设计产品。其次是接近客户，保证产品适应中国市场的需求。对于37%的受访者来说，接近客户对于他们十分重要。第三个原因是可以快速的将产品推向市场，在当地竞争中取得先机。

以下因素对你们已经在华开展或计划开展研发的影响有多大？

(N=19)



## 7 你们的研发活动主要是为哪些市场或地区服务的呢？

80%以上的受访者表示出口到其他亚洲国家或全球市场，只有16%表示产品只提供给中国市场。

**评论：**中国正成为全球重要的研发基地。

## 8 你们目前在中国进行的是什么类型的研发或打算在中国开展什么类型的研发活动？

约90%的受访者表示在中国的研发工作将集中在产品和技术开发以及改进上，基础研究与应用研究并不多。

## 9 你们的研发活动能够实现最初的预期吗？

在中国设立研发中心是个错误：0%

实现了预期的30%：11%

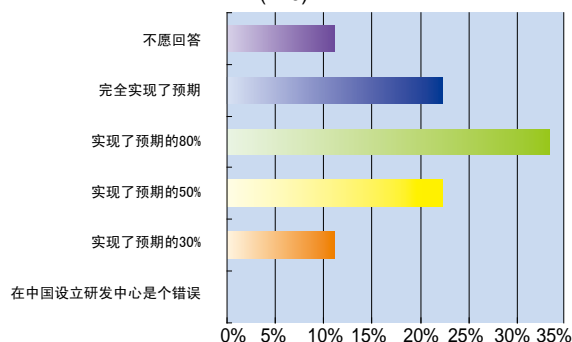
实现了预期的50%：22%

实现了预期的80%：33%

完全实现了预期：22%

你们的研发活动能够实现最初的预期吗？

(N=9)



**评论：**企业的预期与调查结果有所偏差，这也说明了中国还处于建成创新中心的初级阶段。

## 10 其他发现：

**研发力度：**60%的受访者将5-10%的中国收益用在了在中国的研发活动上。

**研发力度：**78%的受访者计划在未来的2-5年里扩大研发活动，22%计划保持目前的水平，没有受访者计划减少或停止在中国的研发投入。

**缺乏政府支持：**只有约1/3的受访者表示得到了政府的支持，约55%的受访者没有得到与研发相关的政府支持。

**低于预期：**50%以上的受访者表示供应商和研发的发展速度没有达到他们的预期。

**知识产权保护：**只有11%的受访者认为知识产权保护（人力资源层面上）给他们带来了许多麻烦。

**人际网络：**与机构建立联系很难。只有33%的受访者认为可以很容易的建立这种联系。

**人际网络：**2/3的受访者已建立了研发活动与政府组织或其他公共研究机构间的联系，其中只有66%认为这种联系对他们十分有帮助。

# “Major Paradigm Shift Towards East”

## Roche R&D China Head Andreas Tschirky on working with China's scientific elite

Interview, Fabian Gull



### Intellectual Property:

"The IP situation in China is clearly much better than its reputation. And don't forget: In any country you face IP challenges - also in the US and Europe", says Andreas Tschirky.

**Andreas Tschirky, when looking at Roche's R&D sites globally, it is striking that they are predominantly in Europe, the US and Japan. Is the production hub of China not ready yet to also play a role as an innovation hub?**

Asia and China in particular are on the rise. In so many fields, as we all know, and this trend includes R&D activities. This trend is still relatively new. But it is without hesitation that I say that what we currently witness in China is a big paradigm shift. More and more companies in different kinds of innovation-based industries are establishing research facilities in Asia, with China being at the forefront. Over time, where production happens in the pharmaceutical industry, R&D will happen too. That's why we opened up a R&D Center in Shanghai back in 2003.

### Why China? Why Shanghai?

China offers a very favorable environment for R&D investments. We looked at some other countries such as India, too. India also has top talented people, but a huge problem with IP rights. Also, companies' interests can easily get violated. China on the other hand, has proven it can deliver. The stability of the country, the prospect of the growing market with an increasing

health awareness, and an increasing number of patients who demand (and can afford) optimal treatment, all played a decisive role. Once this decision was made, it seemed natural to locate in Shanghai as this city is the head quarter for Roche in China and the Asia Pacific region and is on its way to become a science, research and innovation center particularly for the pharmaceutical industry.

### Will the R&D related importance of America and Europe decrease over time?

I strongly believe that there is nothing bad if the Western countries feel also the competition. This will help them to become again more focused to drive their own R&D programs forward.

We should understand the rise of China as a future major innovator as big opportunity for partnerships and co-operation. There are so many challenges and needs to further develop society. No country can claim to be able to find all the solutions by itself. China has a very long historic track record as a major innovator and its own fascinating culture. Diversity in views and thoughts is crucial for driving innovation forward.



**Teamwork:**

"The crucial work is happening in our top scientists' minds", says Andreas Tschirky.

**Why are you doing R&D in China? Is it cheaper? Is it an image thing, or do you expect fewer bureaucratic hurdles and faster market access due to your commitment in China?**

Our motivational drivers are: Talent first, talent second and talent as a third priority! That's the reason why we are here. Going to the "source" of talent is a natural consequence of the vast academic talent pool in China. The other factors you mentioned come into play later. One needs to understand, R&D is such a people based business. The crucial work is happening in our top scientists' minds and brains; so we have to provide a top environment so they can deliver and make it a successful research site.

Coming over to China in order to benefit from China's low cost advantage might be beneficial in other industries. But in R&D, it is certainly not a promising and ample approach. In our business, the quality of what you get is most important, not the price. Hence, the price was never an argument for us. And don't forget: there are also factors which offset these cost advantages such as the strict regulations of importation and exportation of biological materials, just to give an example. Besides, R&D costs have globally and significantly risen in the past. The cost for developing a brand new medicine is around 1.5 billion USD. The coverage of these costs requires a certain company size.

**As a big investor, do you expect faster approval procedures and market access for your products?**

No. This does not reflect our thinking at all. It is the quality of science and therefore first and best in class innovative medicines with big health benefits for patients that allow Roche to have a good market access.

**Do you encounter a talent shortage in China?**

Allow me to quickly go back into history. What is the Chinese pharmaceutical industry and bio-medical research traditionally based on? It's a generics market. This means, expertise such as in chemistry (small molecule based drugs) and bio-engineering (fermentation) are traditionally available in the Chinese labor market. What was and still is less developed, was cross-function knowledge between chemistry, biology, pharmacology and other younger disciplines - and this is where we encounter talent shortages as you can only acquire this expertise at major pharmaceutical and biotech companies. But talent shortages become fewer and fewer as the innovation

based bio-pharmaceutical industry in China is evolving. To develop cutting-edge drugs, outstanding people with different scientific backgrounds need to understand each other. Innovation is teamwork.

**What role do Chinese returnees play?**

A very important one and they are highly in demand! More and more Chinese are coming home, mainly from the United States, where they often enjoyed a world class academic education and pursued scientific careers, often in management positions or as professors. They are mainly coming back because of the better economic prospects in China. An emotional component, a willingness to contribute to the gigantic transformation of their motherland, certainly also plays an important part.

Back in China, returnees implement their knowledge by either joining the industry, being a professor at university, or founding a biotech company or a Contract Research Organisations (CRO) which are innovative biotech companies offering their R&D services to the pharmaceutical industry. As a result, through the multiplier effect of knowledge, China is catching up to Western research standards very quickly and to the great benefit of the country.

**In what fields do you still need to "import" talent from abroad? Please name a few examples.**

For certain research management positions as well as for certain functions in disease biology, we are still hiring returnees. We are confident that over the next few years, more and more of those talents can be hired within China.

**How happy are you with the intellectual property situation?**

We enjoy a very good intellectual property protection. Generally speaking, we found an environment in China that really takes care of our company's interests. The IP situation is clearly much much better than its reputation. We can call the local government if we face a problem and also the central government and the patent offices are very supportive. And let me be clear: in any country, pharmaceutical companies face IP challenges, also in the US and Europe.

You have to be a fair player and not just be bottom-line oriented and sell as much drugs as you can, but also help to create an environment so innovation can grow. Work with the authorities to support the establishment of a good regulatory

## Why we do R&D in China? Talent first, talent second and talent as a third priority!

and legal framework that is beneficial to the industry and innovation development, and be a real partner.

### **What is the biggest challenge you encounter?**

There are some regulatory hurdles in so called "first time into man trials". Currently, China requires foreign data before these tests are allowed in an attempt to protect Chinese patients. But we as a company don't want to conduct early clinical trials outside China and then repeat them in China. In order to become a major driver of innovation in China, we have to be able to do all steps of the drug discovery and drug development here.

Another regulatory challenge, also to be seen in the light of China's past as a generics market, is the fact that pharmaceutical companies have to prove they are able to produce larger quantities of the active drug substance and the drug product than actually is needed for testing a drug on patients. This is a lengthy and costly process.

### **How is the outcome of the education system, relative to your needs?**

It depends. Chinese scientists are the world leaders if you go by number of publications in traditional chemistry, chemical medicine and drug delivery systems. This clearly shows you have an unbelievable talent pool here. China's academic institutions are more focused on basic research and publications, but not much of this IP is translated into products yet.

### **Has Roche developed any new drugs in China so far?**

We only started in 2005, but filed over 40 international patent applications for new chemical structures in China during this time. In pharmaceutical conditions, we are still very young. Please have in mind that it takes 8-15 years on average to develop and market a new drug. And: out of 100 research projects, only two products actually make it as a drug to the market.

### **Is it easier to conduct clinical studies in China?**

Definitively, yes. But let me explain, because "easier" is a misleading expression. There are rising concerns abroad regarding the way clinical tests are conducted in China. I can assure you, we as a company have no interest in violating patients' interests. Nor do we have an interest in not complying with any regulations - and the government protects patients' interest as strongly as elsewhere.

But the big advantage of China is its big hospital network which facilitates the recruitment of patients. For instance in Switzerland it is a huge undertaking to reach the number needed for a study when you only can enroll very few patients

per hospital into your trials. In China you can access a large number of patients much faster. In this respect, clinical studies are much easier in China. Another factor is that doctors in Chinese hospitals see on average about 100 patients per day. I dare to say that their expertise is second to none and this adds a lot of value to our interest to develop new medicines that support patients' lives and well-being.

### **The number of filed patents is an indicator of innovation.**

#### **What are the recent developments in this regard?**

Well, the number of filed patents is first and foremost a productivity indicator of an R&D site. But we have to differentiate as not all patents reflect the same value for the company.

You can observe a trend that major pharmaceutical companies increasingly test new R&D models that do not require big upfront infrastructure investments and thousands of scientists to conduct more than 90% of the R&D work within their companies. External innovation through co-operation with academic institutions, Contract Research Organizations and biotech companies is also of big importance. About 40-45% of our innovation work is conducted at external partners sites. The overhead costs are reduced, and there is much more flexibility to conduct R&D work. Many overseas and domestic R&D service organizations have been established in China. I believe that this is the future way of the Pharmaceutical industry innovation. In China and world-wide.

### **Andreas Tschirky**

Andreas Tschirky is head of the Roche R&D Center in Shanghai which has been established in 2004. Tschirky, born near Basel (Switzerland), studied pharmacy at University of Basel and holds a PhD from Paul Scherrer Institut where he worked on an inter disciplinary project covering immunology, biochemistry, pharmacology and nano technology. In particular, he conducted research on nano particles as potential carriers for drugs.

In 1998, he did post doctoral studies in Nanjing and that's when his fascination for China started. After working at hospitals and pharmacies, he joined Roche in 1999. After only six months at the headquarters, he had been sent to Shanghai as a research representative.

End of 2003, the Corporate Executive Committee under the leadership of Dr. Franz Humer approved the establishment of a R&D center in China. Today, the R&D Center China mainly focuses on cancer and viral diseases, particularly liver diseases.

# “主要创新向东方转移”

## Andreas Tschirky 谈论与中国科学界精英的合作

访谈：方必安



Andreas Tschirky:

“很多重要的工作正在顶级科学家的头脑中进行。”

**Andreas Tschirky**，如果看一下罗氏研发在世界各地的分支的话，我们会发现它们在欧洲、美国和日本市场都占有惊人的主导地位。罗氏在中国的生产中心还没有准备好发挥研发中心的作用吗？

亚洲和中国在许多领域都发展的很快，包括研发活动。虽然这些活动还不太成熟，不过毫无疑问中国正在经历巨大的模式转变。越来越多的来自不同创新领域的企业开始在亚洲建立研究机构，而中国则是首选。随着时间的推移，药剂行业的研发工作必定会在其生产中心进行。因此，我们2003年就在中国上海开设了研发中心。

### 为什么选在中国上海设立研发中心呢？

我们首先对亚洲的国家进行了调查，发现了一些问题，比如虽然印度拥有许多顶级人才，但却存在着很大的知识产权问题，使得企业的利益不能得到保证。而经验证中国的研发投资环境是非常有利的，包括稳定的社会环境，人们对健康的逐步重视预示着不断增长的市场需求，以及越来越多的病人希望得到（并支付得起）最好的治疗等，这些都是我们决定在中国建立研发中心的决定性因素。当做了这个决定后，将研发中心选在上海就成了自然而然的事，因为上海正成为科学、研究和创新的中心，尤其在制药领域。

### 美国和欧洲的研发中心作用是否会逐渐减弱呢？

我认为竞争是一件好事，这会使西方国家的研发中心赶到压力并更加专注于他们的研发项目。

我们应该把崛起的中国看做是未来主要的创新中心和合作伙伴，不过目前的挑战很多，社会仍需进一步发展。没有任何一个国家可以单独解决一切问题。中国在历史上就是主要的创新者，并具有十分丰富的文化，不同的观点与思想是推动创新的关键。

为什么你们要在中国进行研发呢？是因为成本低吗？它是否只是一个形象工程？你们对中国市场的重视是否为你减少了来自官方的阻碍并使你们能够更快的进入市场呢？

我们的动机首先是人才，其次是人才，最后还是人才！这是我们来到中国的原因，人才的“来源”是中国教育巨大进步的自然结果，随后才是你提到的其他因素。我们知道研发是人的事业，很多重要的工作正在顶级科学家的头脑中进行；因此我们要为他们提供一个最好的环境使我们可以进行成功的研究。

对于其他行业来说，来到中国享受中国的低成本也许是一件好事，不过在研发领域低成本并不能保证丰厚的回报。在我们这个行业，重要的是质量，而非价格。因此，这个论点对于我们来说并不成立。我想指出的是，许多其他的因素如生物材料进出口的严格限制其实已经抵消了这种成本上的优势。此外，研发成本已在全球范围内大幅提升，开发一种新药的成本大约是15亿美元，只有具有一定规模的企业才能支付得起。

**作为一家较大的投资者，您认为批准程序以及产品进入市场的速度会加快吗？**

不会，我们不这么认为，是我们的研究质量以及我们创造出的对健康很重要的药物使得罗氏能够在中国立足。

### 你们在中国有没有遇到人才短缺的情况呢？

我想很快的回顾一下历史。中国传统的制药行业和生物医药工程研究是基于什么呢？是非专利药品市场。也就是说生物工程（发酵）和化学（小分子药物）人才在中国都是现成的。中国目前不太发达的化学、生物、药剂和其他新兴领域的交叉知识，这样的人才也很短缺，只有在大型的制药和生物科学企业才能找到。不过随着中国生物制药产业创新在



# “ 我们的动机首先是人才， 其次是人才，最后还是人才！ 这是我们来到中国的原因 ”

中国的发展，人才短缺的现象也越来越少。只有具有不同科学背景的顶级人才互相理解才能开发出最前沿的药物。创新就是团队合作。

## 中国的海归人员在你们的研发中扮演着什么样的角色呢？

他们很重要，而且我们对他们的需求也很大！现在越来越多的人学成归国，其中有很多在美国接受了先进的教育并有志于科学事业，他们在我们公司担任着管理级职位或是教授职位。中国不断发展的经济前景将他们吸引回国，在情感上，他们也更愿意为祖国的巨大转变做出贡献，当然会在我们的团队中担任重要的角色。

这些归国人员通过进入企业、院校或成立合同研发机构成为医药领域的供应商来应用他们的知识。因此，知识的乘数效应使中国以很快的速度追赶西方研究标准，为中国社会造福。

## 那么在哪些领域你们仍需从国外“进口”人才呢？

一些研究管理的职位以及一些疾病生物学职位我们仍需海归人士。我们相信今年后，这样的人才将都可以在中国找到。

## 你觉得中国目前的知识产权保护状况如何？

我们的研究获得了很好的知识产权保护。总的来说，我们所在的环境对我们公司的利益进行了很好的保护。我想中国的知识产权保护现状明显要比大家听说的要好的多。当我们遇到这方面的问题时，我们可以找当地政府解决，此外，中央政府和产权局对我们的工作也很支持。还有一点我想指出的是，在任何国家，包括美国，制药公司都面对着来自知识产权方面的挑战。

作为以创新为本的企业，应该充当一个公平的竞争者，也就是说不仅仅要提高销售额，还要建立一个供创新发展的环境。因此我们不但要与当局合作创造一个法律框架，还要成为一个真正的合作者。

## 你们遇到的最大挑战是什么？

是一些关于“首次应用于人体”的规范阻碍。目前，中国为了保护病人要求我们在进行测试前提供相关的国外数据。不过作为一家企业，我们不想先在中国之外的其他地区进行早期临床测试，然后再将这些药物引入中国。为了成为在中国创新的主要推动者，我们需要经历药物开发与推广的每一步。

另外一个来自监管上的挑战是，中国作为一个非专利药品市场，制药企业需要证明他们具有在保证质量不变的情况下，能够较大批量的生产药物，要达到这一点对病人进行药物测试是必需的。这将是一个长期和高成本的过程。

## 根据你们的需求，中国教育体系的效果如何？

在这一点上不可一概而论。如果数一下出版传统化学、化学药物和药物传递系统作品的科学家数目的话，中国科学家遥遥领先，也就是说中国拥有一个令人难以置信的人才库。中国的学术机构更侧重于基础研究与

出版，不过这样的知识产权尚未转化为产品。

## 至今罗氏在中国开发出过新药吗？

我们2005年才开始在中国的研究，目前已经注册了40多项新化学结构的国际专利。我们在制药条件方面，还很不成熟，而且开发和推广一种新药平均需要8-15年的时间。更不要说在每100个研究项目中，只有两种产品能够真正进入市场。

## 现在在中国进行临床研究是否更容易了呢？

是的。不过我想解释一下，因为“更容易”是一种容易产生误解的表达方式。在国外人们对在中国进行的临床试验越来越担心。但是我可以保证的是，作为一个公司我们没有任何要侵犯病人利益的打算，也不想违反任何规范—中国政府向世界各地的政府一样都坚决维护病人的利益。

中国的一大优势就是巨大的医院网络。而在瑞士，如果每家医院只有两名病人能够接受测试，那么你就很难进行所需的研究。而在中国，你可以很快接触到很多病人。在这方面，在中国进行临床研究更容易。另一个因素是中国的医生每天都要为约100位病人看病，我敢说他们的技术绝不亚于任何人，这对于我们为了病人的健康而进行的新药开发研究来说是宝贵的。

## 你们目前有多少项专利？最近在中国的研发有哪些新进展？

专利是衡量一个研究中心的能力的最首要也是最重要的因素，不过我们也应区别对待，因为不同的专利对公司的价值是不同的。

现在的一个趋势是大型的制药企业越来越多的测试不需要大的前期设施投资的新型研发模式，数以千计的科学家在进行着公司90%以上的研发工作。与学术机构、合同研发机构和生物科技公司合作进行的外部创新也变得越来越重要，我们40-45%的创新工作都是在合作伙伴处进行的，这样不但减少了经费，也使研发工作变得更灵活。我认为这是制药行业创新今后的发展方式，不论在中国还是在世界其他地方都是这样。

## Andreas Tschirky

Andreas Tschirky出生于瑞士巴塞尔，曾就读于巴塞尔大学药剂学专业，随后在保罗·谢尔研究所攻读博士，从事免疫学、生化药理学和纳米技术的跨学科研究，专攻药物纳米载体研究，现担任成立于2004年的罗氏研发（中国）有限公司研发总裁。1998年，Tschirky来到中国南京进行博士后学习，并深深地为中国所吸引。他先后就职于医院和制药机构，并于1999年加入罗氏。他在罗氏总部工作半年后，被派遣到中国担任研究总裁的职务。在此期间他建立了影响深远并对设立临床预科研究中心具有重要意义的学术网络。2003年，罗氏前任CEO Franz Humer批准了中国研发中心的成立。如今，罗氏药品开发中国中心主要研究癌症及病毒性疾病，尤其是肝脏疾病。



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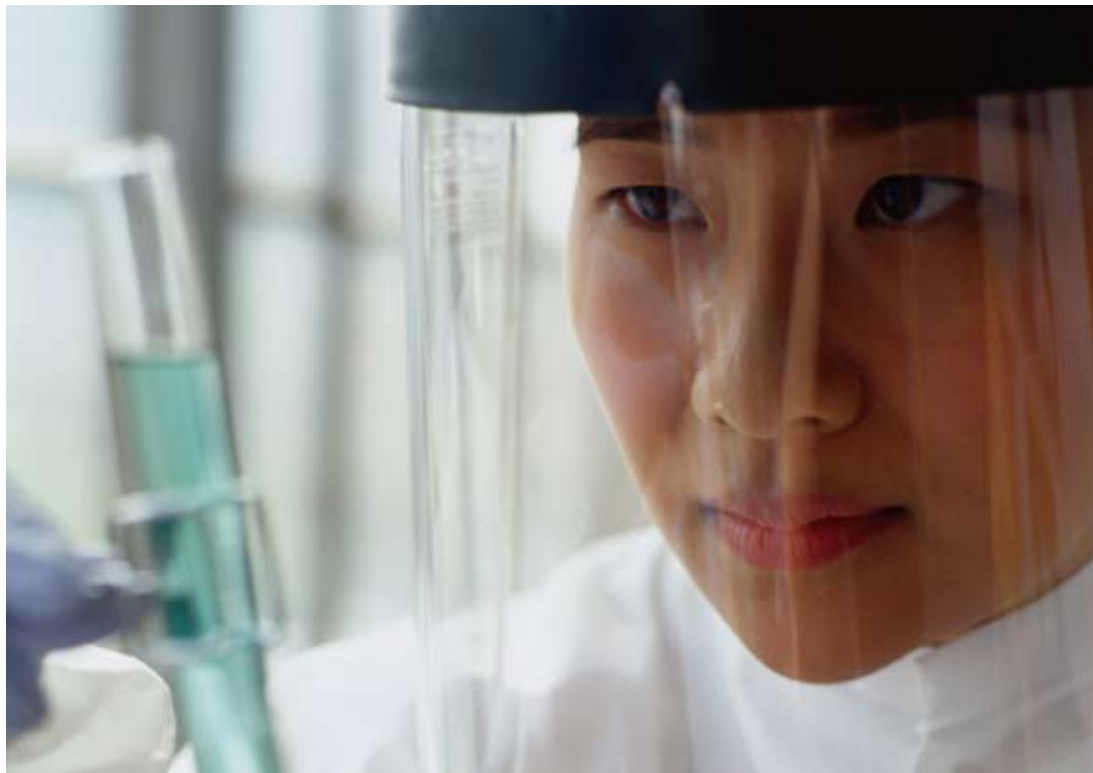
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# Boosting Research and Innovation

## The Chinese innovation landscape seems to be undoubtedly promising

By Lan Zuo Gillet, Director Sino Swiss S&T Cooperation /Consul, swissnex China



*Stimuli at governmental and institutional levels are translated into effective incentive schemes for Chinese scientists.*

Lagra Database



**D**espite the global financial crisis, China has been steadily increasing its global expenditure for Research and Development. According to recent data from the National Statistics Bureau, China's R&D expenditure in 2008 reached 461.6 billion Yuan, representing a 24.4% year-to-year increase and a respectable 1.52% of the GDP. With a very ambitious targeted ratio of 2% by 2010 and 2.5% by 2020, China is determined to catch up to the level of developed countries (Sweden 3.6%, Germany 2.5%, France 2%, and United States 2.7%, all 2007 figures).

As a result of such constant effort in boosting China's competitiveness in research and innovation, the number of patent applications in China surged to 717'000 in 2008, 31 times the number in 1986, while the number of patent authorization in 2008 amounted to 352'000, 518 times that of 1986. In terms of

research output, the Science Citation Index (SCI) recorded 89'000 scientific papers in 2007, 18 times that of 1986, and jumped from the world rank of No. 24 in 1986 to No.3 in 2007.

Behind such self-explanatory causality between Chinese investment in R&D and its increasing innovation strength, it is interesting to take a closer look at the various stimuli used in China at governmental and institutional levels as well as to understand how these measures are translated into effective incentive schemes for Chinese scientists.

### Top-down and bottom-up approaches

In China, research and innovation priorities are set by the central government and under the guidelines of its five-year strategic plan. As a governmental science and technology (S&T) policy maker and funding agency, the Ministry of Science and Technology (MOST) is in charge of formulating these priorities by taking into consideration the nation's S&T challenges



and long-term development needs. It is responsible for allocating substantial financial resources to enhance national innovation competitiveness in these areas. The mechanism of National S&T Major Projects typically reflects such a top-down approach. For the year of 2010, 16 National S&T Major Projects have been defined. Two typical examples are (1) the development of high-end CNC machine tools and basic manufacturing equipment, and (2) the development of core electronic devices, high-end general purpose chips and basic software products.

Companies as well as research universities and research institutes are invited to apply for dedicated funding from MOST to participate in these very specific applied research projects.

On the other hand, in view of ensuring long-term development of China's innovation competitiveness, the National Natural Science Foundation of China (NSFC) was founded to financially support bottom-up research initiatives. Similar to the Swiss National Science foundation, a large portion of NSFC funding allows free applications, and the emphasis is set on conducting basic research and basic applied research.

As a general rule, research grants from central governmental agencies such as MOST, NSFC, MOE (Ministry of Education) and CAS (Chinese Academy of Sciences) or from provincial or municipal governments, are referred to as vertical funding; while income from private or public companies for specific R&D & innovation mandates, financial support from other Chinese ministries, such as the Ministry of Health, Ministry of Defence, etc. for problem solving, R&D topics, are usually called horizontal funding.

### National award system

Apart from allocating horizontal and vertical funding to facilitate top-down and bottom-up R&D and innovation, the Central Government has also gradually installed a comprehensive S&T award system. The Science and Technology Progress Award was established by the central government back in 1984 when China was striving 1) to introduce and integrate foreign advanced technology, and 2) for the development of its S&T system to keep pace with the rapid development of its economy. To date, there are multitudes of distinctions at the national level to encourage outstanding research and innovation, such as the State Supreme S&T Award, the State Natural Science Award, the State Technological Invention Award, and The People's Republic of China International S&T Cooperation Award, etc. Many other awards also exist at a ministerial and local government level, or among universities and research institutions. In general, these awards have limited financial impact on prize-winners, but could drastically shorten their career paths to step up in higher academic rank.

### Stimuli for innovation in private companies

In the national plan of long term S&T development (2006-2020), it is stipulated that a favourable fiscal policy will be implemented to encourage public and private enterprises to intensify research and innovation. According to the guidelines, companies will be given fiscal incentives for their purchase of advanced technology and equipment, as well as get financial support from the government to set up an R&D centre abroad.

As a concrete measure of mastering proprietary innovation and boosting technology transfer, the central government is currently formulating a special law concerning new technology acquisition. It intends to have the preferential right to acquire specific home-developed technologies, or to provide subsidies to the Chinese companies buying high-tech equipment developed in China. Other governmental support to private high-tech companies includes facilitation of financing, investment in high-tech parks to offer preferential condition, assistance in going abroad, or for being listed in stock markets.

It is interesting to note, that contrary to most developed countries where governments do not subsidize privately owned companies, a private company in China is entitled to apply for R&D funding from MOST or other local government S&T agencies to carry out R&D in some specific areas. Similar to the Practice of CTI (Commission for Technology Innovation) in Switzerland, it is also possible for a company to get a matching fund from governmental agencies such as MOST for some specific projects carried out with academic partners.

### Local incentive schemes at universities

In addition to above measures and stimuli, creative incentive schemes have been used across the universities or research institutes to motivate scientists to actively engage in basic and applied research and to strive for innovation. We can enumerate several types of incentive schemes:

#### 1) Part of project funding as personal income

The remuneration of faculty in universities is usually composed of a base salary, a variable part, and an additional income associated with the funding of his research projects obtained from outside the university. The basic salary is usually relatively low. The variable part exists if the number of teaching hours exceeds the nominal teaching load. A very special Chinese incentive for conducting more research and innovation with universities, is that a portion of the research funding obtained (outside of the universities) could be disposed by the grant receiver as his personal income. From horizontal funding, a higher percentage (sometimes up to 20%) can be taken as his personal income, compared to the vertical funding from central or local government, where a smaller portion can be used (depending on whether or not there are specific rules). Some universities allow 5% of vertical funding for personal use, but flexibility and latitude exist in China when it comes to defining the scope of personal or project spending.

Such a direct, performance-related incentive scheme would pop the total revenues of some star faculty members in Chinese universities up to millions of Yuan, substantially higher than their colleagues. As a rough indication, the annual salary of a Chinese professor (basic salary+ variable part) at top universities is between 100'000 to 150'000 Yuan (approx. 15'000–23'700 CHF).

#### 2) Attractive spin-off options at some CAS institutes

At the Chinese Academy of Sciences, professional researchers are usually not allowed to take a percentage of the project fund as their personal income. Instead, they get a performance bonus related to the volume of mandates or amount of project funding they obtained. Such a performance

bonus could also depend on the number of publications or number of S&T distinctions a researcher has received.

At some CAS research institutes, highly qualified, promising scientists from home or abroad are offered (as part of the hiring condition) the option of becoming - after a certain period - the majority shareholder of his future spin-off company. The newly hired scientist brings in 1) his knowledge and experience, 2) his previous and future research results, and 3) his successful science to market process - in exchange for a major stake (for example 65%), in the spin-off company. The CAS institute would value the salary of the scientist, the capital equipment and research team provided during the incubation period as its investment, and take a minor stake in the start-up (for example 25%). Sometimes, additional financing would come from a venture capital company in exchange for a percentage of company shares (for example 10%). When the option of a spin-off company is not exercised in due time, the researcher continues to work for CAS institute as a normal employee.

### 3) Matching funding and award

In order to encourage its faculty members to be involved in major national research programs and to reach out for domestic and international cooperation, top Chinese universities often match the research funding obtained by their scientists with an additional grant from the university's own S&T budget. As an additional stimulus for research excellence, some universities distribute matching awards to their scientists who have received S&T and innovation distinctions at a national or provincial level/s.

A Shanghai based university has, for instance, set up an internal policy to attribute additional 2.5-3 times of the prize amount to its faculty distinguished with the 1st S&T prize at a national level, and 1.2-2.5 times of prize value to those receiving the 2nd S&T Prize at a national level. As an indication, a first S&T innovation Prize at a national level is between 100'000 to 200'000 Yuan (approx. 15'000 to 30'000 CHF).

### Conclusion

With steady government investment, simultaneous top-down and bottom-up approaches, accompanied by creative local incentive schemes, the Chinese research and innovation landscape seems to be undoubtedly promising and beyond limit. However, heavy governmental intervention in research and innovation tends to bring some unavoidable, less positive side effects: in Chinese universities, professors are often seen busy chasing research funding and industrial mandates for the purpose of increasing his personal income, while leaving teaching duties as a last priority. As national major S&T projects sponsored by the central government are mostly short term and applied research oriented, long term basic research attracts less and less faculty members and students.

Sino-Swiss research cooperation has been increasing over the past few years and will certainly be growing in the future as well. How the Chinese research system, with its various incentive schemes briefly described above, and the Swiss ones can learn and profit from each other remains an interesting question to be answered.

# 推动中国研发

## 中国科研创新的奖励体制

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**尽**管经济危机涉及全球，中国始终不断加强对科研的投入。据国家统计局的统计数据，中国2008年的科研投入高达4.616千亿元，和2007年同比增加了24.4%，达到了相当可观的国民总收入的1.52%。根据中国政府的激进方案，2010年的科研的投入将达到国民总收入的2%，计划在2020年达到2.5%，赶上世界发达国家的相应水平(瑞典3.6%，德国2.54%，法国2.08%，美国2.67%，2007)。中国政府不断提升科研竞争的一系列措施促使2008年专利申请数高达7百17万，是1986年的31.3倍，专利授权数为3百52万，是1986年的518倍。从科学论文角度来看，2007年内中国在“科学论文索引”中记载的论文有8万9千篇，是1986年的18.3倍，从1985年世界排名的24位跃入2007年的第3位。

面对以上科研投入和成果之间这样显而易见的因果关系，我们不妨仔细探索一下中国目前所存在的各种激励科研产出的机制和方法，以更好地理解政府和机构层面的方针政策是如何转换成这类高效率机制的。

### 从上至下和从下至上双管齐入，纵向经费和横项经费互相结合

在中国，科研创新的重点和优先项目是由中央政府根据国家五年计划的发展策略而设定的。中国科技部负责制定中国科研方针政策，根据国家长期的科研需求和面临的挑战制定科研重点和方向，合理地分配科研经费以提高国家在这些重点领域里的科研水准和竞争力。各类国家重大科研项目的确定和研发就是这种从上至下体制的反应。就2010年而言，中央政府一共设立了16个重大科技专项，其中包括高档数控机床与基础制造装备，核心电子器件、高端通用芯片及基础软件产品等。高校，科研单位以及有关公司都可以申请专项基金，参与这类应用课题的研发活动。

为了从长远角度改善中国科研创新的竞争力，中央政府还设立了国家自然科学基金，鼓励从下至上的各类科研倡议。中国国家自然科学基金和瑞士国家科学基金相似，很大的一部份用以支持科研人员自行选择的课题，可以自由申请。国家自然科学基金的支持重点是基础研究和基础应用研究。

在中国，中央政府如科技部，教育部，中科院或国家自然科学基金

# 许多来自政府层面和 机构层面的奖励政策都已转化 为对中国科研人员的有效激励机制

以及省政府，市区政府颁发的科研基金通常被称为纵向经费，而由公司课题或国家其他部委特殊课题而得来的科研经费被广泛称为横向经费。

## 国家科技奖励制度

除了横向和纵向科研经费相结合以促进科学成果的产生，中国政府还建立了一个完整的科技奖励制度。科技进步奖设立于1984年，用于鼓励中国科研人员努力引进并消化国外先进技术，同时紧跟本国经济发展的步伐。后来相继有一系列的国家级奖励出笼，其中包括国家科技重大成果奖，国家自然基金委奖，国家科技创新奖，中华人民共和国国际合作奖等。

在国家其他部委和地方政府层面上，或是在高校或研究所，也有各种奖励制度。这些奖励从经济角度而言总体上力度并不很大，但有时会急剧加快获奖人在高校或研究所职称的提高。

## 政府促进企业科技创新的鼓励政策

在国家2006年到2020年的长期发展规划中，中国政府强调要建立和完善鼓励企业科技创新的税收政策。根据这个规划，中国企业在购置技术装备时可以享受一定的税收优惠政策，政府还会为中国企业在国外开设研发部门提供经济上的支持。为了掌握和保护有自主产权的技术，推动技术转移，中央政府正在考虑制定政府对新技术的首购法规。对于本国研制的技术，政府将有首购权。同时政府将为购买本国研发的高新技术的企业提供资金方面的帮助。其他支持高新企业的政府措施包括：为高新技术企业提供融资方面的优惠，增加对建设高新技术区的投资，帮助高新技术企业上市或向国外发展等等。

值得一提的是，在大多数发达国家，政府一般不会慷慨解囊支持私立企业的研发。而在中国，政府允许私立企业单独申请国家指定的重点项目的研发经费，享用研发成果。当企业和高校联手进行科研活动时，和瑞士的科研创新基金 CTI 体制相似，企业可以从政府那里申请有关科研经费，然后再贴上匹配经费同高校合作。

## 高校和研究单位里的各类鼓励政策

除了以上各类政策和措施，在各个大学和研究所层面上还有很多颇有创意的方法，以鼓励科研人员在基础和应用研究领域内大胆创新。我们可以笼统地把各类方法归纳成以下几种：

### 1) 部分课题经费作为个人收入

在中国大学里，一个教授的工资一般由三部分组成：基本工资，流动工资以及和从校外所得科研经费有关联的附加收入。基本工资相对较低，如果教学工作量超出正常的工作量，教授就会得到相关的流动工资。中国特有的奖励科研和创新的方法是允许教授把一部分从校外得到的科研经费转化为个人附加工资。一般一个科研人员可以从横向经费里提取高至20%的经费作为个人的收入。然而，对纵向经费的使用，研究人员会有很多限制。多数情况下只能提取比较小一部分，取决于基金本

身是否有明文规定。有的大学规定可以从纵向科研经费里提取5%作为私人收入。在中国，一般科研人员在课题经费开支和申报时都有一些“灵活”余地。这种与所得科研经费直接挂钩的奖励制度可以使一小部分研究方向和当前急需解决问题相近，且有能力拿下课题的明星教授变成百万富翁，收入远远超出一般教授的工资水平。作为参考，一般名牌大学教授正常的年收入（基本工资和流动工资加在一起）在10万到15万人民币左右（约等于1万5千到2万4千瑞士法郎）。

### 2) 使研究员成为研究所分拆公司的大股东

在中科院的研究所里，专业研究员一般不容许从课题经费中提取一部分作为个人工资。一般流动工资大约是固定工资的20%左右，和年内拿下的科研项目的数目和经费的总数有一定的关系。也取决于与科学论文的质量和科研奖励的数量。

有些中科院研究所在聘请人才时，对个别有才能和成果的的研究员有时会提供允许他在若干年后成为拆离出去的公司大股东的期权。新雇的研究员以他的学术和经验，过去和将来的研究成果，以及产学研相结合的成功方案，换取在若干年后拆离出来的新公司里的大部分股权，比方说65%。中科院的研究所则将以这些年内支付给研究员和他的研究团队的工资，以及所购买的实验装置和设备，换取拆离出去的新公司的小部分股份，比方说25%。一般还会有风险投资公司投资，占领比方说10%的左右的股份。如果期权到期此科研骨干却没有准备好筹建新公司，期权就到此作废，研究员则继续留在研究所工作。

### 3) 匹配经费和奖励

持续渐进的政府的投资，从上到下和由下至上相结合的科技方针，加之灵活多样的地方鼓励体制，中国的科研和创新前景看起来光明无量。然而，政府在科研创新领域里的过度扶植和干预也将不可避免地带来一些弊病：一些大学教授因整天为科研经费和工业界横向课题奔波，而把教学任务放在最后一位。由于国家重大科技专项一般资金丰厚，且都是短线的应用性很强的课题，长远性的基础科研对教师和学生来说就越来越缺乏吸引力。

## 结论

持续渐进的政府的投资，从上到下和由下至上相结合的科技方针，加之灵活多样的地方鼓励体制，中国的科研和创新前景看起来光明无量。然而，政府在科研创新领域里的过度扶植和干预也将不可避免地带来一些弊病：一些大学教授因整天为科研经费和工业界横向课题奔波，而把教学任务放在最后一位。由于国家重大科技专项一般资金丰厚，且都是短线的应用性很强的课题，长远性的基础科研对教师和学生来说就越来越缺乏吸引力。

近几年，中国和瑞士的科技合作领域越来越广泛。随着两国科技人员之间更深入的接触和了解，如何相互参考借鉴两国不同的科研系统，取长补短，互补互利，是一个很有意义的话题。



# “One Country – Four Markets”

Interview with Susan Chen, CEO of Swatch Group  
China and winner of the 3<sup>rd</sup> SwissCham CEO Award 2010

Interview, Fabian Gull



19<sup>th</sup> CEO Interview  
总裁访谈录  
Susan Chen  
CEO of Swatch Group

***The Bridge: Susan Chen, what watch are you wearing today?***

Susan Chen: It's a Jaquet Droz. A classic one I often wear, unless I am attending an Omega or Rado event, of course. My weekend watch for casual and sports is a Swatch.

***You have a nice portfolio of eighteen brands to choose from...***

...19! There is a new one. Tiffany (smiling).

***Which is your preferred non Swatch Group watch?***

Oh, I can't tell. I am emotionally so strongly attached to our brands so I don't even think of it (laughing).

***What a politically correct answer. In the midst of the crisis, Swatch Group presented resilience with only slightly lower turnover and net profit. How is the situation in China?***

We don't publish numbers on a country basis. However, I can tell you China became the most important market for our group in 2007 and has held that position since. Growth rates in the last eight years have been simply tremendous. Speaking of market shares and sales revenues, for example, Omega today is not only the number one brand of Swatch Group in China but also the number one imported brand in the whole watch industry in China.

SwissCham SHK



From left: Christian Guertler (SwissCham Shanghai), Edgar Oehler (AFG), Susan Chen (Swatch Group), William Keller (Keller Pharma Consulting), William Frei (Consul General).

**Does this include Hong Kong?**

No. Only mainland China.

**Is China also outperforming the Group in terms of growth?**

Yes, we are (smiling). In major markets, we had the fastest growth within the group in 2009.

**Did you lower the prices to appeal more to customers?**

Gosh, no! We are categorically objected to discounts. Not an easy task in a discount country like China.

**Nick Hayek, CEO of Swatch Group, is expecting 2010 to become the best year ever in the history of the company.**

We also believe so for China. If you are in a growth trend every year naturally becomes a new record year. January 2010 was our best month ever.

**Haven't you been affected at all by the crisis?**

We were, but just a little. September 2008 and afterwards was difficult. The message sent out by the markets was: Spend your money wisely as hard times lie ahead of us. Of course, this mood affects a luxury company.

From an investment point of view, a lot of companies stop their investments when they see a crisis looming. But we always believed in China and continued to cautiously invest and expand. We did a lot of celebrity events of different brands, shop openings throughout the country, launches of new collections and so on. We are working very hard! And

saved costs! We retracted management costs and renegotiated all rental fees. Generally, we still believe the future in China is unlimited!

**Which brand do you need to baby-sit the most?**

I do the coordination for all brands. But Omega always requires a lot of attention. And I am the ad interim brand manager of Rado. So there.

**What is the cheapest watch in your portfolio?**

Let's call it most affordable watch (smiling). It's a Swatch for RMB 398. Then it goes all the way up to Breguet. We also sold a Blancpain for RMB 7 million a while ago.

**Let's talk about counterfeits. Which is your most copied brand?**

I don't know since we don't do any statistics. But one has to differentiate: There are of course counterfeits available on the streets of let's say Omega or Breguet. But - and that's important - they are clearly advertised and sold as such! The buyer knows what he gets when he purchases a fake Omega for RMB 200! Those kinds of counterfeits are not a real problem for us.

But it is a completely different story when fake watches are being sold at the original rate and customers are deliberately being deceived and cheated in our name! Happily and this may come as a surprise to you, in all the years, I did not see a single one of these so called "real counterfeits" of any one of our brands in China! Not a single one! In this

respect, a carefully controlled distribution is essential. We need to know where our watches go to and all our retailers need to sign an official retailer agreement as part of our quality control. And we are looking for retailers that are passionate about our products.

**So the cheap counterfeits don't do you any harm commercially.**

Not at all. It would be nicer if they weren't around but we are not overly concerned about it.

**Fake watches are also an indicator of how well a brand is established. So do they flatter you after all?**

No, no! This is your statement. I cannot agree to that (laughing).

**What is different in China compared to other markets?**

China is very different. When you look at the maturity of the market, China is still at an introductory stage. But the average amount of money a Chinese is willing to pay for a watch is higher than anywhere else in the world! Also, China is one country but not one market. The East is different from the West, the North from the South so there are at least four different thriving markets. The speed to catch consumers' interests is very high as Chinese absorb outside influences so quickly. If you are just observing and do lifelong strategic evaluation, you lose. You must attack quickly and this is what we are good at!

**Are there any differences taste wise?**

Yes, indeed. Brands are even more

“In all the years, I did not see a single "real counterfeit" of any one of our brands in China!”

important than in mature markets. Chinese don't just buy a watch for themselves but want to make a statement. They want others to know what brand they are wearing. In general, Chinese prefer something subtle instead of shiny, whereas gold and diamonds are more popular elsewhere. The more European trend of having big watches has not arrived in China yet. And we see a growing appreciation of mechanical watches which is quite surprising.

**Which was the first watch of Swatch Group being sold in China?**

Rado. In 1979. After the Cultural Revolution.

**How independent are you from your headquarters?**

We are very close to the headquarters and yet operate very independently as we enjoy a lot of trust. Mr Hayek knows China well and visits us about four times a year. At our headquarters, there is a lot of China knowledge.

**Describe your management style.**

I am very performance and result driven. Company interests are always first. Chinese are so eager to learn. So I give them opportunities and coach them so they can demonstrate their talent and improve on the job.

I am directive at the beginning, then accompanying, and then I delegate. This results in very loyal employees, particularly in management positions.

**You distribute to retailers but also compete with your retailers by having your own corporate stores...**

Objection! The strategy behind corporate stores is not to antagonize our retailers but to build up a brand! Corporate stores shall help boosting the whole market, particularly to the benefit of retailers.

Profitability is not the only main purpose of our corporate stores.

**How difficult is it to get watch makers in China?**

Good question. It is very difficult. As high-quality watchmakers are not available on the Chinese labour market we have to educate them by ourselves. So we built up the "Nicolas G. Hayek Watchmaking School" at Shanghai University in 2000. We started off with only five students. It is a two years educational program with today a total of 40 seats, so every year 20 freshly graduated watchmakers join Swatch Group.

**Are they as good as Swiss watch makers?**

Hmmm, of course (smiling). That's our mission to accomplish. They all get additional training in Switzerland and with time our watch makers get very experienced and well rounded specialists.

**How did your margins develop?**

Because we became more cost effective we could slightly increase our operational margins. In the end, our margins are primarily affected by the exchange rate between RMB and the Swiss Franc and commodity prices. There is nothing we can do.

**As a result of strong growth: Do you suffer from production shortages? Could you sell more watches if you could produce more?**

(Thinking). Probably we could sell more, yes, depending on the brand and model. I am thinking of limited editions where demand is usually much higher than supply. Speaking of hand made mechanical watches, a natural production limitation is given by the amount of highly skilled watch makers which are quite rare

even in Switzerland. However, our focus is on quality, not quantity.

**Who is your main competitor?**

I would say it is ourselves.

**What are your main challenges?**

So many. China is a global battlefield. Everybody is here. One needs to understand scope and scale of China which are bigger than some continents. This is energy consuming and also requires a certain physical strength and sturdiness.

**How many emails you receive a day?**

Oh my gosh! Sixty. Seventy.

**Susan Chen**

Susan Chen, winner of the SwissCham AFG CEO/Entrepreneur of the Year Award 2010, grew up in Taiwan and majored in business administration with a focus on marketing. Starting her career at Johnson&Johnson in Taiwan, she continued seeking positions at market leading companies before joining Swatch Group China in 2002. The energetic business lady describes herself as passionate, determined and adventurous. Susan lives in Shanghai, has to "handsome sons" both studying at the university in Taiwan. She enjoys diverse hobbies such as movies, art, sports and rhythmic music.

What is currently keeping her busy is Swatch Groups engagement in the historical Shanghai Peace Hotel. Swatch currently conducts an elaborate renovation of the entire building. Apart from Breguet, Blancpain, Omega and Swatch boutiques, the exclusive venue will include exhibition and artist work-shop facilities. The building is due to open with the Expo and shall represent a flagship store with global charisma.



# “在中国市场没有发现斯沃琪手表以假混真的现象”

专访斯沃琪集团中国CEO及2010年中国瑞士商会“第三届年度最佳首席执行官奖”获得者Susan Chen

访谈：方必安



19<sup>th</sup> CEO Interview  
总裁访谈录  
Susan Chen  
CEO of Swatch Group

《桥》：Susan Chen，你今天戴的是什么牌子的手表？

Susan Chen：我戴的这块是很经典的雅盖·德罗，除非是参加欧米茄或是雷达的宣传活动，平常我都戴这块手表。周末休闲和运动的时候我戴的是一款斯沃琪品牌的手表。

你可以在斯沃琪的18个品牌中任意选择……

……是19个品牌！我们增加了一个新品牌：蒂芙尼（笑）。

除了斯沃琪集团的手表之外，你最喜欢的其他品牌有哪些？

很难说。我在情感上十分专注于斯沃琪的品牌，所以目前还没有想过这个问题。（笑）

**这个回答太妙了。尽管受到了金融危机的袭击，斯沃琪集团很快就适应了这种危机，并将销售额和净利润下降控制在较小的范围内。那么斯沃琪在中国的表现又如何呢？**

我们并不向外界公布公司在某个国家的业绩数字，不过有一点我想指出的是，从2007年开始中国成为斯沃琪集团最重要的市场，并一直保持着该重要地位。斯沃琪中国在过去八年里的增长是巨大的，在市场份额和销售额方面，欧米茄不但是斯沃琪集团在中国的第一品牌，还

是中国整个手表行业的第一进口品牌。

**包括香港地区在内吗？**

不包括，只是中国大陆地区。

**斯沃琪在中国市场的增长是否快于整个集团的增长呢？**

是的（笑）。在中国的主要市场，2009年我们的增长率是整个集团里最高的。

**为了吸引顾客，你们有没有采取降价措施？**

当然没有！我们是绝对反对折扣的，这在像中国这样的要求折扣的国家是很不容易的。

**我听说了斯沃琪集团的首席执行官 Nick Hayek认为2010年将是贵公司历史上发展最好的一年。**对于中国市场我们也是这么认为的。如果每年都以增长的趋势发展，那么自然每一年都是一个新的纪录。比如2010年1月是我们做的最好的一个月份。

**你们一点都没有受到金融危机的影响吗？**

我们受到了一些影响，不过不是很严重。从2008年9月开始我们就陷入了艰难的处境，市场发出的信息是：消费者在艰难时期更要精明的消费。这种情绪当然会影响到奢侈品企业。在投资方面，许多企业在看到危机到来时便停止了投资活动。而我们则始终相信中国市场并不断进行谨慎的投资和扩张。我们举行了许多品牌宣传活动，并在全国各地增开新店、推出新款等。我们不断努力控制成本，不但缩减了管理成本，还通过谈判获得了更优惠的房租价格。总的来说，我们仍然相信斯沃琪在中国未来的发展是不可限量的！

**最需要你小心呵护的是哪个品牌？**

我负责所有品牌的协调工作。不过欧米茄需要经常关注，另外作为雷达品牌的临时品牌主管，我也会经常关注这个品牌的成长。

**在你们所有的品牌中，价格最便宜的手表品牌是什么？**

让我们从大部分消费者可以买得起的手表说起吧（笑），价格最低廉的是斯沃琪的一款398元的手表，价格最昂贵的是宝玑，中间还有一些中等价位的品牌。前一段时间我们还卖出一块价值700万元的宝珀。

**在仿冒品方面，被仿冒最多的品牌是什么？**

由于我们没有做过这方面的统计，所以具体是哪个品牌我也不太清楚。不过我们有必要区分仿冒的性质：我们在街上可以看到比如欧米茄或是宝玑的仿冒品，不过很重要的一点是这些商家会指出是仿冒品并按照仿冒品的价格来销售！这样的话消费者在花200元购买的时候十分清楚他们购买的是仿冒品！这种仿冒对于我们来说并不是一个大问题。

另外一种仿冒则完全不同，它按照正品的价格销售，顾客在购买的时候并不知道他们购买的是仿冒品，这使我们的品牌受到了损害！也许你会感到很惊讶，不过我们很庆幸的是这么多年以来在中国我们还没有发现这种以假乱真的现象！一个都没有！在这方面，关键是要有一套严格控制的分销渠道，掌握产品的去向，同时作为质量控制的一部分要求零售商签订正式的零售协议。此外，我们的零售商对斯沃琪的产品充满着激情。

**那就是说便宜的仿冒品并不会在商业上给你们带来损害。**

一点都不会。如果没有这些仿冒品的话可能会更好一些，但是我们并不对它们的存在感到十分担忧。

**不过仿冒品的存在也在某种程度上说明这个品牌在消费者中十分受欢迎，这有没有使你们在某种程度上感到高兴呢？**

没有！对于你的说法，我不敢苟同。（笑）

**中国市场与其它市场相比有哪些不同之处？**

中国市场是十分与众不同的。如果看看中国市场的成熟状况的话，我们就会发现中国还处在起步阶段。不过中国人愿意为一块手表支付的平均价格要远高于世界其他国家！此外，虽然中国是一个国家，却拥有不止一个市场。东部地区不同于西部地区，北部地区又不同于南部地区，因此在中国至少有四个蓬勃发展的不同市场。由于中国人在迅速的吸收来自外界的影响，我们也要迅速的捕捉消费者的兴趣。只注重观察并做过于长远的战略的话将注定面临失败。因此必须行动迅速，这也正是我们所擅长的！

**在品味上有没有不同呢？**

确实存在不同。在中国，品牌比在成熟市场更加重要。中国人买一块手表不仅仅是为了自己使用，还希望向其他人炫耀。总而言之，中国人喜欢精细的商品而非闪耀的商品，这也是为什么黄金和钻石在其它地区比在中国更流行。时下欧洲流行的大块手表的趋势还没有进入中国，而且我们还惊奇的发现越来越多的人喜欢机械手表。

**在中国销售的第一个斯沃琪集团的手表品牌是什么？**

是雷达。文化大革命结束后的1979年进入中国。

**你们相对于总部的独立性有多大呢？**

我们与总部保持着紧密的联系，总部的信任使我们在运营上十分独立。Hayek先生对中国非常了解，他每年都会对中国公司进行至少四次访问。我们总部对中国的知识也十分丰富。

**可以描述一下你的管理风格吗？**

我的风格是绩效和结果导向，并将公司利益摆在首位。中国人的求知意识很强，因此我就为员工提供机会并引导他们施展自己的才华，在工作上获得提升。在最开始的时候我会以指令式为主，随后会转变为伴随式以及代表式。这种风格使我获得了忠诚的员工，尤其是在管理层。

**你们的产品分销给零售商，同时你们还通过公司商店的形式与零售商竞争……**

不是这样的！公司商店的战略不是为了与零售商对抗，而是建立品牌！公司商店可以提升整个市场，这对于零售商尤其有利。我们开公司商店的主要目的不仅仅是盈利。

**在中国找到制表匠有多难呢？**

非常难。由于在中国的劳动力市场找不到现成的熟练制表匠，我们只好自己培训。因此我们2000年在上海大学成立了“海亚克钟表学

校”。这是一个两年的技工项目，最开始只有5名学生，现在已经发展到在校40名学生，每年都会有20名学生毕业加入斯沃琪集团。

**他们在技术方面跟瑞士的制表匠一样成熟吗？**

当然（笑）。这是我们要完成的使命。这些制表匠还会在瑞士接受额外的培训，经过一段时间的磨练后，他们就会变得很有经验并成为技术全面的专家。

**你们的利润增长情况如何呢？**

由于我们降低了成本，因此运营利润也相应的有所提高。不过，我们的利润受人民币兑换瑞士法郎的汇率以及商品的价格的影响最大，在这方面我们也无能为力。

**高增长有没有给你们带来产品短缺现象？如果你们的产量增加的话，销售量也会跟着增加吗？**

（思考）。根据品牌和款式不同，我想我们可以销售更多，尤其是那些需求远高于供给的限量版。而对于手工机械表来说，由于这样的高级制表匠即使在瑞士也是十分稀少的，因此产量自然就受到了限制。不过，我们追求的是质量，而非数量。

**你们最主要的竞争对手有哪些？**

我认为是我们自己。

**你们面临的主要挑战有哪些？**

有许多挑战。中国是一个全球性的战场，每个人都可以参与其中，只有了解中国这个大市场的范围和规范的人才能取胜。而这是要花许多功夫，要求体力和毅力的。

**你每天会收到多少封邮件呢？**

很多！有时60多封，有时70多封。

## Susan Chen

2010年中国瑞士商会AFG年度最佳CEO/企业家获得者Susan Chen出生于台湾，专业为企业行政管理，专攻市场营销。Susan Chen的事业起步于强生的台湾公司，在2002年加入斯沃琪中国集团之前，她还先后就职于其他几家大型公司。Susan Chen是一位精力充沛的职业女性，她对经营充满了激情，做事果断而又具有冒险精神。现在她在上海生活，她的两个“十分帅气的儿子”都在台湾的大学读书。她还拥有很多爱好，如看电影、艺术、运动以及强节奏的音乐等。

目前Susan Chen正忙于斯沃琪集团对历史悠久的上海和平饭店的修缮工作。除了销售宝玑、宝珀、欧米茄和斯沃琪精品外，这座独一无二的饭店还将承担展览和艺术工作室的角色。饭店的修缮工作定于世博会前结束，并与世博会同时向观众开放，届时它将成为具有全球号召力的旗舰店。



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# “Often Encounter Lack of Information”

In order to achieve something in China, one needs time, says Claudio Mazzucchelli of Osec

Interview, Fabian Gull

**Claudio Mazzucchelli:**  
“To increase risk awareness of Swiss SME is our most important role”



## **What is OSEC's mission in China?**

The Swiss Business Hub is the arm of OSEC in China. OSEC is a purely private association with members who have been mandated by the Swiss government to coordinate trade promotion and later on investment promotion worldwide. As of today, there are 16 Business Hubs worldwide, where half of them are overseas and the other half are in Europe. Despite the growing importance of emerging economies in terms of trade, don't forget that roughly 66% of Switzerland's trade still happens within Europe.

**So basically you are doing two things: Helping Swiss companies entering the Chinese market; and secondly, helping Chinese companies entering the Swiss market.**

Exactly. We call it trade promotion and investment promotion. In the field of export promotion, we mainly deal with small and medium enterprises (SMEs) that wish to export to China, or maybe want to set up manufacturing facilities, or are just looking for partners in China, (i.e. distribution partners). Some have never

OSEC

been to China and want to explore their chances, so we help them find the right partners. Most big Swiss multinational companies are already well established in the Chinese market and therefore need our services to a lesser extent.

Investment promotion works the other way round. We are aiming at rather big Chinese companies that are interested to either establish a presence in Switzerland, or reorganise their structure in Europe and maybe relocate to Switzerland. Some Chinese companies are already in Europe with sales or representative offices. We explain to them what the advantages of setting up a European headquarters in Switzerland would be.

#### ***How many Chinese companies could you already fetch over to Switzerland?***

Formally, we just started our investment promotion activities in January 2010. So, none so far. Before, investment promotion was carried out by a private company in Switzerland and we took over their mandate. But there are some very interesting and promising signals, so we are positive about upcoming success stories.

#### ***How many Chinese companies are already in Switzerland?***

Leaving aside Chinese restaurants, we estimate something between 30-40 Chinese companies. Unfortunately, there are no official statistics.

#### ***What are the most common wrong assumptions of Swiss companies you encounter?***

A sometimes dramatic lack of information and insufficient risk awareness. Small companies often have no idea - or have very little knowledge about China. Maybe they have been here as a tourist or have read about the economic boom in China and want to be part of it. China is a fertile but also a difficult ground. Timing is another issue: Some are not patient enough and just have "quick money" in mind. In order to get something done in China, one needs time. A lot of time. And money. From a product point of view, much more Swiss SMEs would have the potential to successfully do business in China. But they lack resources, particularly money and staff. This is a problem.

## **“ OSEC is not a State subsidized competitor of privately funded Swiss companies ”**

#### ***What can you do?***

Help getting their risk awareness right! This is one of our most important roles. Don't forget: Big companies can bare losses, but for small companies, it can easily become a question of life and death. If we think a company is not prepared well enough, or does not have the right products, resources or knowledge, we recommend them to maybe try an easier market and leave China aside for the time being.

#### ***Any success stories in the field of export promotion?***

Sure. There are several companies that we introduced into the Chinese market - for example - in the machinery, food and chemical sector. But don't make the mistake of viewing only the establishment of a company as a success! Let me be clear on that: It is also a success if we help a company to avoid making a mistake and losing money! I give you an example: if the market research we conduct on behalf of a client comes to the conclusion that there is no demand for certain goods or services, we dissuade them from coming over to China. As long as we help, it is a success.

#### ***How many Chinese companies you think will you be able to convince to set up a presence in Switzerland in the near future?***

At this stage it is impossible for me to give you a number. Potential and dynamics are there. But the process of setting up companies can take years.

***There is big confusion in the Swiss business community - not just in China - due to the fact that there are so many players operating in the same field. Official and private ones. There is Osec, Seco, the chambers***

***of commerce, economic sections of embassies and consulates, SIPPO, Economisuisse, the export risk guarantee and plenty of private market entry and consultancy companies. Similar picture in investment promotion. People simply do not know who to address for what. Do you understand this confusion?***

I certainly do, as there are indeed many players. But our role is clearly defined and we maintain excellent relations with other players. Different inquiries are handled according to competencies. As long as everything is coordinated in a proper way, and every organisation has its strengths and communicates well, I certainly do not regard this variety of players as a disadvantage.

#### ***Is OSEC a State subsidized competitor of privately funded Swiss companies in China?***

Absolutely not. Whenever we get a mandate from a Swiss company, let's say to conduct market research, we outsource it to external private partners we have identified - to a so called "pool of experts". So we are not a competitor but a supporter as we actually create business for them. Basically, we are a platform in between Swiss companies and these experts and coordinate the process according to the clients needs.

#### **Claudio Mazzucchelli**

Claudio Mazzucchelli entered the Department of Foreign Affairs' consular section more than 25 years ago. Originally from the beautiful Canton of Ticino, his professional career has taken him to places like Casablanca, Seoul, Moscow, Houston, Cairo, Berne, London and Beijing. Mazzucchelli has been dealing with export and investment promotion since 1993. His first posting in China dates back to the period of 1993-98, when he was in charge of trade promotion at the Swiss embassy in Beijing. After that, he performed as head of the Swiss Business Hub UK based out of London for six years. Since summer of 2008, he is back again in China as Head of Osec Swiss Business Hub China. He is 51 years old, married and has two children who are both studying at university in London.

# “频遇信息缺失”

瑞士投资促进署(OSEC)Claudio Mazzucchelli指出：“我们也注意到企业在进入中国市场时所面临的风险”。

访谈：方必安



## OSEC在中国的使命是什么？

瑞士商务促进中心是OSEC在中国的分支。OSEC是一个纯粹的私营机构，其会员按照瑞士政府的要求在世界范围内从事贸易与投资促进活动。时至今日，OSEC在全球共有16个商务中心，其中一半在欧洲，一般在世界其他地区，这是因为尽管新兴国家在贸易领域的地位正变得越来越重要，但瑞士66%的贸易活动仍在欧洲进行。

**也就是说你们主要有两项任务：帮助瑞士企业进入中国市场，以及帮助中国企业进入瑞士市场。**

是的。我们称之为贸易与投资促进。在出口促进领域，我们主要面向的是对中国有出口业务的中小企业，或是准备在中国设立生产基地、或在中国寻找合作伙伴（如销售伙伴）的企业。一些企业从未与中国市场接触过，却又对中国市场充满了好奇心，我们的任务就是帮助他们找到合适的合作伙伴。大部分大型的瑞士跨国企业已经在中国市场有了较好的发展，他们对我们的依赖并不大。

在中国方面，我们的工作正好相反。我们主要面向的是对瑞士市场感兴趣或是在欧洲市场重组并有可能进入瑞士市场的大型中国企业。许多中国企业在欧洲市场拥有销售团队或代表处，我们的任务就是帮助他们了解欧洲总部设立在瑞士的诸多益处。

**你们已经成功的帮助了多少家中国企业进入瑞士市场呢？**

由于我们从2010年1月份才正式开始从事投资

促进活动，所以迄今还没有成功的案例。此前，投资促进活动主要是由瑞士的一家私营企业进行的，现在我们接管了他们的业务。不过我们已经看到了许多有趣和令人欣喜的讯号，我们相信不久将出现很多成功的案例。

## 目前有多少家中国企业进入了瑞士市场？

将中国餐厅排除在外，我们的估计是30-40家企业。但现在还没有官方的统计。

## 瑞士企业对中国市场最普遍的错误预期有哪些？

严重的信息缺失和风险意识不充分。许多小型企业对中国市场一无所知或知之甚少，他们的中国经历可能只是在这里旅游过，或是在报刊上读到关于中国经济迅猛发展的信息，于是便希望进入这个市场。中国市场是一个充满机遇的市场，同时也是一个困难重重的市场。进入的时机是另外一个问题：一些企业急于求成，但是如果想在市场有所作为，企业必须用足够的时间了解市场。此外就是资金问题，从产品的角度来说，大多数瑞士中小企业都具有打入中国市场的潜力，但是他们仍缺乏资源，尤其是资金和劳动力。这是一个很大的问题。

## 你们能为他们提供哪些帮助呢？

帮助他们充分认识风险的存在！这是我们主要任务之一。有一点我们应该谨记：大型企业承受损失的能力较强，而对于小型企业来说，一旦失败可能就是致命的损失。因此如果我们认为某个企业还没有准备好或是缺乏合适的产品、资源或知识，我们就会建议他们暂时放下中国市场而转战其他市场。

## 在出口促进方面有没有成功的案例呢？

当然有。我们已经成功的介绍了一些企业进入中国市场，如机械、食品和化学领域的企业。不过成功并不仅仅指在中国成立公司！我想强调的是：帮助企业避免犯错和损失对于我们来说也是成功！举例来说：如果我们代表客户进行的市场调研结果显示市场对于某些商品或服务没有需求，我们就会劝阻企业进入中国市场。因此，只要我们的帮助起到了效果，那就是成功。

**你认为在不久的将来你们可以成功的说服多少家中国企业进入瑞士市场？**

目前来说我还很难给出一个数字。机遇和动力都很大，不过设立公司的过程是较长的。

**不仅仅在中国，由于同一领域内存在着太多竞争对手，瑞士商业团体一片混乱，包括官方的和私营的团体，如我们有OSEC、瑞士联邦经济总局(SECO)、商会、大使馆和领事馆的经济处、瑞士进口促进项目(SIPPO)、瑞士经济行业协会(Economiesuisse)、出口风险担保以及许多从事市场准入与咨询的私营企业等。投资领域的局面也大同小异，也没有相关的部门来解决这一问题，你对这一混乱的局面是怎么看的？**

在贸易与投资领域确实存在着很多竞争者。不过我们的任务十分明确，同时还与业内其他机构保持着很好的联系。根据各机构能力的不同，他们处理的业务也有所不同。只要协调顺畅，各个组织保持其优势，我并不认为竞争会带来不便。

## OSEC是一个由政府资助的众多瑞士私营同行的竞争对手吗？

完全不是。每当我们从瑞士企业获得任务时，如进行市场调研的任务，我们会外包给指定的外部私营合伙人，由他们的“专家库”帮助我们进行调研。因此我们不是一个竞争者而是一个支持者的角色，我们为他人提供业务。总的来说，我们是一个瑞士企业与专家间交流的平台，并根据客户的需求进行沟通协调。

## Claudio Mazzucchelli

Claudio Mazzucchelli来自于瑞士美丽的提契诺州，在瑞士外交部领事司工作已超过25年。他的工作性质使他先后旅居卡萨布兰卡、首尔、莫斯科、休斯敦、开罗、柏林、伯恩和北京等城市。1993年，Mazzucchelli开始从事出口和投资促进工作。1993-98年间，他首次来到中国任职，并在瑞士驻北京大使馆负责贸易促进事务。随后的六年里，他又在伦敦担任瑞士商务促进中心(Swiss Business Hub)英国区会长。2008年夏，他再次来到中国并出任OSEC瑞士商务促进中心中国区会长。Mazzucchelli现年51岁，已婚，两个孩子均就读于伦敦的大学。





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# Precision Craftmanship

## How Universities of Applied Sciences (UAS) Contributed to the Swiss Society

By Dr. Maio Su Chen, SSSTC China Coordinator, ETH Zurich



The Swiss State Secretariat for Education and Research, the owner of the Sino Swiss Science and Technology Cooperation (SSSTC) program, recognizes the importance of UAS participation in the SSSTC program and encourages the involvement of the UAS in the program. In 2008, two UAS projects have been awarded. After an intensified effort in informing the UAS of the SSSTC, we have currently seven under evaluation. Through the SSSTC, we look forward to familiarize both the Chinese universities and industry with the Swiss UAS.



Swiss prosperity is not only built on its beautiful landscape but as its political and social stability, low unemployment rate and highly skilled labor force. With ETHZ, University of Zürich, EPFL, University of Basel, and University of Geneva ranked amongst the world's top 100 universities, the success and strength of Swiss universities is unquestionable. They have contributed greatly to the intellectual vigor and technological advancement of the Swiss society and are translated ultimately into wealth and stability. But, is this the one and the only Swiss formula of success?

According to data from SECO<sup>1</sup> and Eurostat<sup>2</sup>, the unemployment rate (March, 2009) in the EU was 8.3% with a youth unemployment rate of 18.3%. This is in contrast to the Swiss overall unemployment rate of 3.4% and the youth unemployment rate of 4.0% for the same period. Undoubtedly, a low unemployment rate is an important stabilizing factor for the Swiss society. How is this done?

### Cost effective dual education system

In his book "Warum wir so reich sind" (Why are we so rich), Swiss politician Rudolf Strahm contributed this Swiss success story to the dual education system of Switzerland, i.e. the system where young people are directed to either a general education curriculum which leads to studies in a classical university, or to a vocational training which could ultimately lead to studies in the universities of applied sciences (UAS) ending up with either a bachelor or a master degree. One may or may not agree with Mr. Strahm's argument, but it is undeniable that the Swiss dual education system is cost effective. It provides the country with highly competent workers

and professionals. It is well-recognized among the Swiss that one gets a "professional" education rather than a "second-rate" university education from the UAS. A graduate with an UAS bachelor degree receives a substantially higher starting salary on average than his counterpart from a classical university (Strahm, 2009). The success of this system also results in a healthy attitude toward education: the fierce competition for college entrance is unheard of in Switzerland. Children are able to enjoy their childhood and learn a trade that affords them a good living in the future.

The competence of the UAS in education as well as in research can be best demonstrated by their connection to the industry and consultancy engagements. Many of such involvements are in the form of bilateral international cooperation. The following are just a few examples of UAS' China/international engagements:

- FHNW business school provides a public management program for the Gansu province. The program has been running for 15 years. FHNW has similar cooperation with Russian and Vietnamese governments.
- Joint master degree program in Precision Manufacturing between SUPSI University and the Guangdong Province.
- Bern University of Applied Sciences, Architecture, wood and Civil Engineering School collaborates with Tongji University on "The Kitchen" project for sustainable architecture.

We believe that the UAS has contributed greatly to the Swiss society and wish to introduce their contributes in China. We look forward to see more UAS engagement in China and in the SSSTC program.

<sup>1</sup> <http://www.seco.admin.ch/>

<sup>2</sup> <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>



# 精密技术

## 应用科学对瑞士社会的贡献

作者: Chen Maio 博士, 中瑞科技合作项目中国协调员

随着推出中瑞科技合作(SSSTC)项目的瑞士教科秘书处对UAS参与SSSTC项目重要性的认识与鼓励, 2008年, 我们的两个UAS项目获得了嘉奖。在对SSSTC的UAS进行密集通告后, 目前我们已有七个UAS项目进入了评估阶段。我们希望通过SSSTC项目使中国的大学和产业了解瑞士的UAS。

瑞士的繁荣不仅仅立足于秀丽的国土景观, 更重要的是它的政治与社会稳定、低失业率和高度熟练的劳动力。瑞士联邦理工学院、苏黎世大学、洛桑联邦理工学院、巴塞尔大学和日内瓦大学都是世界排名前100的大学, 瑞士大学的成功与实力是毋庸置疑的, 它们为瑞士社会贡献了智慧和先进的技术, 并最终带来社会财富和社会稳定。但是, 这是决定瑞士成功的唯一因素吗?

根据瑞士联邦经济总局(SECO)<sup>1</sup>和欧盟统计局(Eurostat)<sup>2</sup>的数据显示, 2009年3月欧盟的失业率为8.3%, 其中青年失业率为18.3%; 这与同期瑞士整体失业率3.4%、青年失业率4.0%形成鲜明的对比。毫无疑问, 低失业率是决定瑞士社会稳定的重要因素。怎样才能做到呢? 或者这一切应归功于:

### 低本高效的二元教育体系

瑞士政治家Rudolf Strahm在他的书“Warum wir so reich sind”(瑞士富有的缘由)中将瑞士的成功归功于瑞士的二元教育体系, 即指导学生学习公共教育课程并进入普通大学学习, 或指导学生接受技术培训并最终进入应用科学大学攻读学士或硕士学位。不论Strahm先生的观点正确与否, 我们都不可否认的是瑞士的二元教育体系是低本高效的, 它为瑞士培养了技术纯熟的工人和专业人才。在瑞士, 人所皆知的是从UAS获得的是“专业”教育而非“二类的”大学教育, UAS的本科毕业生就业的平均起点工资要比普通大学的本科毕业生高得多(Strahm, 2009)。该体系的成功也使人们对教育持有健康的态度: 瑞士的大学入学考试竞争并不激烈, 孩子们可以渡过愉快的童年, 并在长大后学习一门技术安度一生。

UAS与行业和专家的联系彰显出它们在教育与研究领域的实力, 这种联系往往是以国际双边合作的形式进行的。以下是UAS与中国/国际合作的一些例子:

- 瑞士西北高等专业学院(FHNW)商学院为甘肃省提供了一个公共管理课程, 这个项目已经进行了15年。FHNW与俄罗斯和越南政府也有类似的合作。
- 瑞士南方应用科技大学与广东省合办的精密制造硕士课程。
- 伯尔尼大学应用科学院、建筑学院、土木工程学院与同济大学合办的以可持续性建筑为主题的“厨房”项目。

UAS对瑞士社会作出了巨大的贡献, 我们希望能将这些贡献带到中国, 并希望有更多UAS与中国和SSSTC的合作项目。

1 <http://www.seco.admin.ch/>

2 <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>

## elope - An Initiative for Innovation for Learning and Teaching

By Peter Bölsterli, KFH (Rector's Conference of the Swiss Universities of Applied Sciences) China Delegate



Innovation primarily happens by convergence of disciplines previously considered disjunct. This is why universities nowadays are committed to offer their students not only professional knowledge but also an openness and skills for the dialogue with other disciplines; in short to educate trans-disciplinary thinkers.

elope is a study platform to practice and experience trans-disciplinary work at the Bern University of Applied Sciences. elope carries out complex real-world projects under the meta-theme “architecture and health”. In this year's project “The Kitchen”, led by the Bern University of Applied Sciences and the Tongji University, students from five countries with backgrounds in architecture, landscape design, interior architecture, mechanical engineering, sociology and interior design created novel concepts to combine healthy living and eco-tourism in a village on Chongming Island, China.

## elope - 启发学习与教学创新

作者: Peter Bölsterli, KFH(瑞士应用科学大学校长联席会议)中国区代表

# 创

新首先来源于被认为无关的学科间的会合。这也是为什么当前许多大学在教授学生专业知识的同时, 还帮助学生打开思维、学习与其它学科交流的本领, 也就是培育跨学科人才。

elope是一个伯尔尼大学应用科学院建立的体验和实践跨学科项目的学习平台, 该平台在“建筑与健康”的主题下进行现实世界的项目实践。今年由伯尔尼大学应用科学院与同济大学共同组办的项目“厨房”, 是由来自五个不同国家和建筑、景观设计、室内建筑、机械工程、社会学和室内设计等不同领域的学生参加, 为崇明岛的村庄创造结合健康生活与生态旅游于一体的新概念。





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# Understanding China's Wealthy

**China will soon be home to the world's fourth-largest population of wealthy households. Companies that hope to reach them must understand how they differ from their counterparts elsewhere, from other Chinese consumers, and from one another.**

By Yuval Atsmon and Vinay Dixit of McKinsey



**T**alking about wealthy consumers in China may seem odd during the middle of a global economic crisis. Yet for many companies around the world, wealthy Chinese represent a rare opportunity in an otherwise dismal picture.

Despite the global downturn, the number of wealthy households in China continues to grow. By 2015, the country will hold the world's fourth-largest concentration of wealthy people. Companies that better understand the factors behind their purchases could steal a march on the competition. Our research shows that their behavior is very different from that of their counterparts in other countries and of consumers in other income classes inside China. Indeed, the pool of luxury consumers has become large enough to form distinct segments, each with its own behavior and needs.

Our work included face-to-face interviews in 16 cities with 1,750 wealthy Chinese consumers—people in households earning more than \$36,500 annually, which gives them the

spending power of a US household making roughly \$100,000 a year. These wealthy Chinese households, with an average annual income of about \$80,000, represented the top 1 percent of earners in China's cities. We supplemented the interviews with home visits by our researchers, who also accompanied many respondents on shopping trips. In addition, we talked with brand managers and marketing specialists in China who serve this sector, visited luxury brand stores, and conducted exit interviews there.

To succeed, marketers selling luxury brands or the premium end of mainstream brands must understand what makes these consumers pick one over another. Indeed, they vary sharply in their preferences: for example, some wealthy consumers in China are still looking for status labels, while others try not to display their wealth. Companies that fail to understand such distinctions could end up wasting millions in marketing dollars and missing big opportunities.



## Big—and getting bigger

Even in the downturn, China remains one of the world's few growth markets, with GDP expected to expand by 6 to 8 percent in 2009, according to official and private estimates. The crisis has affected all of the country's income levels, however, and data on reactions to it remain inconclusive because the situation is changing so rapidly. Anecdotal evidence, particularly discussions with luxury marketers serving China, suggests strongly that spending by wealthy Chinese is growing more slowly but hasn't dropped overall. Indeed, in early 2009 there were tentative signs that growth rates might be edging up again.

The number of China's wealthy households, which hit 1.6 million in 2008, will climb to more than 4.4 million by 2015, trailing only the United States, Japan, and the United Kingdom in sheer size (with definitions of wealth adjusted for purchasing-power parity). Even allowing for the current economic slowdown, the number of wealthy households in China is likely to expand at an annual rate of about 16 percent for the next five to seven years.<sup>2</sup> In developed markets, by contrast, this group is expected to grow largely in line with GDP.

To illustrate how quickly marketers must move to keep pace with China's wealthy consumers, about half of the Chinese who are wealthy today weren't four years ago, and more than half of those who will be wealthy in five to six years aren't today. Spending habits can change quickly when a market grows so explosively. Only a few years ago, for example, Chinese consumers purchased most of their luxury goods outside the country. Today, they make 60 percent of these purchases in mainland China.

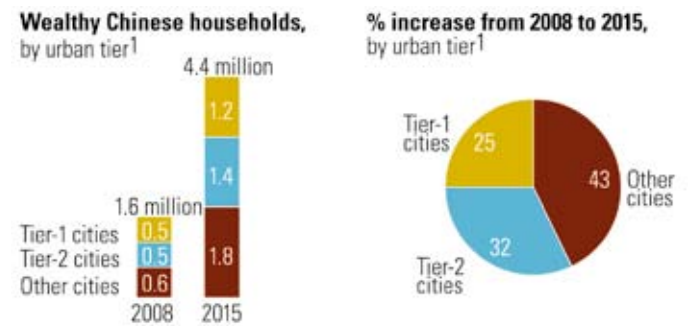
In such a fast-growing market, companies can do much to shape the taste, spending habits, and loyalty of consumers in a wide range of industries—automotive, real estate, banking services, consumer electronics, and other luxury consumer goods and services, for example. Over half of the wealthy Chinese consumers who now buy luxury fashion goods started doing so in the past four years, and only a minority can name as many as three luxury brands in any category.

## Concentration of wealth

As expected, a disproportionate number of China's wealthy households currently live in its biggest and most developed cities, in the east and central south regions. China's four richest cities—Shanghai, Beijing, Guangzhou, and Shenzhen—account for about 30 percent of all wealthy consumers; the top ten cities are home to some 50 percent of them. (By comparison, the top ten cities in the United States are home to only about 25 percent of its wealthy consumers.) But this concentration is changing.

Our research indicates that over the next five to seven years, three-quarters of the growth in the number of China's wealthy consumers will occur outside the largest metropolises (Exhibit 1). Indeed, much of the growth will occur in the smaller second-tier cities, bringing them on par with the larger second-tier ones. The wealthy class will grow even in the next rung of cities, the third tier. Because many of these new wealthy will be entrepreneurs and other people with strong ties to the places where they live, we expect little migration to the largest cities as incomes rise.

Exhibit 1: Geographic evolution



This shift must force a change in approach for those marketers in China who still focus on Shanghai and Beijing, where competition is fiercest. Companies hoping to seize the full opportunity of the country's growing number of wealthy households can't overlook China's smaller cities, as they often do today. Some of the biggest names in luxury goods have several retail outlets in Beijing, for instance, but are absent in places like Chengdu or Wenzhou, even though Chengdu has more wealthy consumers than Detroit, and Wenzhou has as many as Atlanta, where luxury outlets abound.

## China's wealthy are different

How best to target China's wealthy consumers? If they decide to buy a watch or a leather bag, will they want a genuine high-end brand or be content with a look-alike? When the time comes to buy a car, are they more impressed by the endorsement of a young, glitzy celebrity or of an older, more sophisticated one? Are they more likely to buy a mobile phone deliberately positioned as a luxury brand?

Such questions weigh on the minds of marketers trying to reap profits from China's wealthy consumers. For companies selling luxury brands in other markets, particularly developed ones, the key issue is how the rich in China differ from their counterparts elsewhere. Companies already catering to the mainstream in China and hoping to stretch their brands to the premium market must primarily understand how the country's wealthy differ from other domestic income groups.

Our research shows that these differences abound. They will be critical for any brand targeted at wealthy Chinese.

## Different from their global peers

One of the clearest factors distinguishing China's wealthy consumers from their foreign counterparts is their youth: some 80 percent are under 45 years of age, compared with 30 percent in the United States and 19 percent in Japan. Because they are newer to the consumer market and to wealth, they are less knowledgeable about luxury brands. In addition, China's wealthy value the functional benefits of any particular purchase (the quality, material, design, or craftsmanship, for instance) more than wealthy consumers elsewhere do. The emotional benefits of a purchase—what it says about its owner's taste, for example—count, but for the moment they matter less than they do for consumers in developed markets.

Such differences have clear marketing implications. To

capture younger consumers, for example, Lancôme emphasizes the importance of taking early action to prevent manifestations of aging when the company promotes its range of anti-aging skin care products in China. That approach significantly lifted sales among younger consumers, helping to make Lancôme the largest luxury cosmetics and skin care brand in the country. The manufacturer of the luxury cognac Louis XIII countered its low brand awareness by replacing its traditional ads, featuring luxury images such as pianos, horses, and yachts, with simpler ads that often focus solely on the bottle and packaging. Other brands acknowledge the Chinese consumer's appreciation of functional benefits by emphasizing product quality. When the Italian fashion brand Ermenegildo Zegna, for example, opens stores in China, it conducts demonstrations of how its ties are made in order to emphasize the craftsmanship.

But there is also danger in radically changing a brand's global positioning for the Chinese market. When the Swiss watchmaker Longines first came to China, in the 1980s, it launched a special, brasher product line meant to appeal to the country's wealthy consumers. This line failed. The company's vice president of marketing for China, Li Li, later explained that Chinese consumers felt suspicious when they discovered that Longines products offered in other countries were drastically different. In 1994, the company repositioned itself in China as a classic, elegant brand, in line with its global positioning, and today China is its largest market.

### Different from other Chinese

Our research also shows that wealthy Chinese are very different from the country's other consumers. The gap in attitudes and behavior is particularly stark when we compare them with the mainstream: for example, 52 percent of wealthy consumers said that they trusted foreign brands, compared with only 11 percent of mainstream ones. The wealthy also are more willing to try new technology, more amenable to borrowing, and more likely to have difficulty maintaining a satisfactory work-life balance.

Like Chinese consumers in general, the wealthy watch a lot of television: 77 percent of them—the highest percentage among all the activities cited. What's more, they spend a good deal more time surfing the Internet than do members of other income groups. Such differences in leisure behavior are important to help marketers design the right media mix for reaching these consumers. Wealthy people also spend more time than others do outside their homes, engaging in sports, visiting health spas, and drinking and dining out. Indeed, the wealthy spend 17 percent of their household income dining out (compared with 7 percent for mainstream consumers) and 10 percent on leisure and entertainment (compared with 3 percent for the mainstream).

Such behavior not only confirms that television remains an important medium for reaching wealthy consumers but also suggests that Internet ads, blogs, and other online channels could have a greater impact on them than on other consumers. Companies should also bear in mind the amount of time that the wealthy spend outside their homes. Some premium whiskies, for example, hold marketing events in bars and clubs frequented by the wealthy, but more brands could take advantage of such opportunities. A wider range of sports sponsorships, beyond a

focus on activities traditionally embraced by the wealthy, such as golf, could also help companies reach wealthy consumers. The watch maker Omega, for example, has been the leading sponsor of the Shanghai Golden Grand Prix.

### Targeting the right wealthy

China's wealthy consumers differ not only from their global peers and from other Chinese consumers but also from one another: as this attractive group has grown and continues to grow, stark differences have appeared within it. Marketers must understand them to take full advantage of the growth of these segments.

Easily obtained demographic information—age, gender, and income, for instance—offers little help in separating China's wealthy into segments with differing attitudes toward, say, borrowing, fashion, or obvious displays of wealth. Wealthy Chinese may generally be younger than their global counterparts, for example, but their attitudes are shaped less by age than by other differences. The one exception to the relative unimportance of standard demographic data was location. Rather surprisingly, wealthy consumers living in the four largest cities have more conservative attitudes toward saving and are more focused on family than their peers in smaller cities. Less surprisingly, they are more trusting of foreign brands.

More meaningful differences emerged when we considered what respondents said about their needs—the need to feel unique, for example, or to feel financially secure. This needs-based analysis uncovered seven distinct segments among China's wealthy consumers (Exhibit 2).

Exhibit 2: Seven segments

	Average household income, \$ thousand <sup>1</sup>	% of total wealth	Key characteristics
<b>Luxuriant</b>	85	22	<ul style="list-style-type: none"> <li>Highest income among wealthy and located mainly in tier-1 cities; higher proportion of women</li> <li>Care about health, environment, and quality of family life</li> <li>Passionate about luxury goods</li> <li>Sophisticated, low-key style; fashion leaders</li> <li>Quality matters more than brand; against look-alike products</li> </ul>
<b>Demanding</b>	84	13	<ul style="list-style-type: none"> <li>Higher income than most wealthy yet are hardest working</li> <li>May splurge on products that help them stand out from the crowd</li> <li>Less willing to pay for the best; hard to please</li> <li>Not confident future earnings will grow significantly; dislike borrowing</li> </ul>
<b>Flashy</b>	78	22	<ul style="list-style-type: none"> <li>Slightly above-average wealthy income, with greater numbers in tier-1 cities</li> <li>Big luxury goods spenders and showy; the brand is important</li> <li>Prepared to buy look-alike products</li> <li>Go out of their way to find the cheapest price</li> <li>Confident financially but continue to work hard; care less about health and environment</li> </ul>
<b>Urbane</b>	73	14	<ul style="list-style-type: none"> <li>Lower-than-average wealthy income, with greater numbers in tier-1 cities; higher proportion of males</li> <li>Care about health, environment, and quality of family life</li> <li>Sophisticated but low key; spend less on luxury goods than those in Luxuriant segment do</li> <li>Care more about product quality than brand; against look-alike products</li> </ul>
<b>Climber</b>	71	8	<ul style="list-style-type: none"> <li>Lower-than-average wealthy income, with greater numbers in tier-2 and -3 cities</li> <li>Status conscious and keen to socialize with the up-and-coming and influential</li> <li>Like luxury goods but do not regard them as a necessity</li> <li>Not willing to pay more for better products; go out of their way to find cheapest price</li> <li>Less confident financially</li> </ul>
<b>Down-to-earth</b>	70	10	<ul style="list-style-type: none"> <li>Younger and newer to luxury and wealth; greater numbers in tier-2 cities</li> <li>Value family life over social life</li> <li>Care little about higher-end products; little interest in foreign brands</li> <li>When they do spend on luxury, they stick to low-key, quality products</li> <li>Confident financially, but feel peer pressure to earn more</li> </ul>
<b>Enthusiast</b>	68	11	<ul style="list-style-type: none"> <li>Lowest income among wealthy, with greater numbers in tier-2 cities</li> <li>Enthusiastic about luxury goods; would like to buy more than they can afford</li> <li>Very showy; like brands that help them stand out from the crowd</li> <li>Prepared to buy look-alike products; favor Chinese brands</li> </ul>

<sup>1</sup> \$1 = 7 renminbi in 2008.

Source: 2008 McKinsey survey of wealthy Chinese consumers

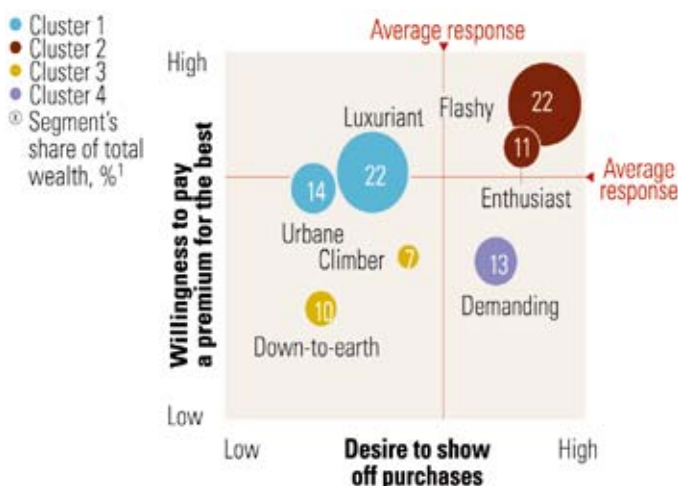
Consumers in the Luxuriant segment, for example, are among the country's wealthiest people, passionate about luxury. They never settle for less than the best and gravitate toward high-end, high-fashion brands, such as Hermès and Chanel. These consumers are a brand's best friend, buying frequently and talking with friends about their purchases. They avoid the brash—opting instead for understated, sophisticated chic—and are seen as trend setters. Although they work hard, they find time to socialize, travel, and be with their families and to visit gyms and health spas.

Compare this segment with the Demanding one: self-made men and women who have more money than they need and are satisfied with their success, although they still work hard. They don't have a taste for luxury goods, especially fashion; rarely buy the very best; often content themselves with look-alikes; and make an effort to compare prices before buying, even at prices they can easily afford. When they do splurge, they like something flashy that sets them apart. In general, though, they settle for products that are more functional, less showy, such as televisions and sound systems.

### Willing to pay a premium

A company must also understand how the different segments relate to one another and craft strategies appealing to several of them to gain the greatest benefit from its efforts. Companies in most industries would gain, for example, from analyzing each segment according to the willingness of its members to pay a premium for what they regard as the best and their desire to flaunt their purchases, a characteristic we call "showiness." Such an analysis, which groups the seven segments into four clusters (Exhibit 3), suggests, for example, that Chinese consumers in the two wealthiest are willing to pay a premium for what they regard as the best but that people in one cluster are more interested in showing off their purchases than people in the other.

Exhibit 3: Optimal impact



Together, the two largest clusters account for about 70 percent of the total wealth held by China's wealthy consumers. This degree of economic importance means that these two will probably be the primary targets for many brands. Digging further, companies should also understand how the relative

weight of each cluster varies among regions and among cities of different sizes and even within individual cities. For example, the cluster composed solely of Demanding consumers is much less important in the largest cities, where they account for about 10 percent of the wealth held by wealthy families, than in other cities, where they account for about 17 percent of it.

The weight of the clusters will change over time. Companies that want to build an early brand advantage will need to consider investing in segments that are relatively small today but will grow in importance. Over the next five to seven years, the fastest-growing cluster, for example, will consist of Climbers and Down-to-earth consumers, who live mostly in the fast-growing cities outside the big four.

### Glossy magazines, TV and internet

For many brands, a better understanding of these clusters can lead to more effective marketing spending. Advertising, for instance, can be targeted at a number of segments within a cluster, because they share important attributes. Consumers in the Enthusiast and Flashy segments both tend to be willing to pay for the best and enjoy showing off what they buy. For them, brands matter and should be noticed; logos and marketing generally ought to be bold. Their intense brand knowledge makes them challenging customers, however: they insist on the latest products and styles and expect salespeople to reflect the brand image in appearance and behavior.

BMW, for example, has a brand position that would appeal to this cluster. The German carmaker offers its full line of products (with design changes catering to wealthy Chinese) and advertises them across a range of channels, such as glossy magazines, television, and the Internet, to create wide brand awareness. Annual BMW Experience Days rotating from city to city offer groups of buyers a first look at the coming year's models, giving these customers a luxurious experience, along with an opportunity to test-drive the new cars.

Companies serving the cluster should offer a strong product line and excellent service, but for these customers the product must be less conspicuous and the marketing more subtle. VIP programs and special marketing events, such as previews of new seasonal lines for only a few customers at a time, rather than large events, can be effective. Celebrities endorsing such brands should reflect their sophistication, and overexposure to them could be harmful. In China, the watchmaker Patek Philippe's strategy would appeal to these consumers: for example, the company's two flagship stores in mainland China are at locations (one of them the historic former US embassy) that exude a sense of heritage and tradition.

### About the Authors

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### Notes

1 The full report is available at the Insights China by McKinsey Web site at [insightschina.bymckinsey.com](http://insightschina.bymckinsey.com).

2 For more information about this forecast, see the McKinsey Global Institute's urbanization study Preparing for China's Urban Billion.

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# 解读中国的富裕消费群体

中国富裕家庭的数量很快将会跃居全球第四。那些希望把握这个消费群体的商家必须了解他们与其他国家的富裕消费者有何不同，他们与中国的其他消费群体有什么区别，以及他们彼此之间又有何差异。

作者：安宏宇，狄维瑞



Harley Zhang

**在** 全球经济危机期间，谈论中国的富裕消费者可能显得有些不合时宜。但是，对于世界各地的许多企业来说，在其他国家低迷惨淡的背景下，中国的富裕消费群体代表了千载难逢的良机。

尽管全球经济低迷不振，但中国富裕家庭的数量仍在不断攀升。到2015年，中国将拥有全球第四大的富裕消费群体。对这部分群体购买行为背后的原因的深入理解将帮助商家在竞争中获取有利地位。我们的研究显示，中国富裕群体的消费行为与其他国家的富裕群体，以及中国其他收入水平消费者的消费行为存在很大差异<sup>1</sup>。事实上，奢侈品消费者的人群已经变得相当庞大，足以形成彼此截然不同的细分群体，而每一个细分群体又有各自不同的消费行为和消费需求。

我们的研究工作包括在16个城市对1,750名中国富裕消费者进行面对面的采访。中国的富裕消费者是指其家庭年收入超过36,500美元的人，该收入水平具有的消费能力与年收入大约10万美元的美国家庭相当。这些中国富裕家庭的平均年收入约为8万美元，代表了中国城市中1%收入最高的挣钱者。作为对这种采访的补充，我们的研究人员进行了家庭访问，他们还陪同许多受访者出门购物。此外，我们还与在中国供职于奢侈品行业的品牌经理和营销专家进行了交谈，访问了奢侈品牌专卖店，并进行了商店出口拦截调查。

为了获得成功，销售奢侈品牌和主流品牌高端产品的营销人员必须了解，是什么原因使这些富裕消费者选择某一个品牌，而不选择另一个品牌。他们选择品牌的参照标准差异极大：例如，有些中国富裕消费

者仍然在追求身份地位的象征，而另一些消费者却并不想炫耀自己的财富。如果不能很好了解这种差别，企业就有可能浪费大量营销开支，并且错失市场良机。

## 巨大且越来越大的市场

即使经济低迷时期，中国仍然是世界上少数几个仍在增长的市场之一，根据官方和私人机构的评估，中国2009年的GDP预计将会增长6%~8%。不过，这次危机已经影响到中国的所有收入阶层，而反映危机影响的数据缺乏说服力，因为形势变化如此之快。未经考证的证据（尤其是与在中国供职的奢侈品营销人员的讨论）有力地表明，中国富裕群体消费支出的增长虽然有所放缓，但总体消费水平并未下降。实际上，在2009年年初，已经有一些尚不确定的征兆表明，消费增长率很可能又在缓慢上升。

2008年，中国富裕家庭的数量达到了160万户。预计到2015年，这一数字将攀升到超过440万户，在绝对数量上仅次于美国、日本和英国（根据经过购买力平价调整后的财产定义）。即使将当前的经济低迷考虑在内，在未来5年~7年中，中国富裕家庭的数量也很可能以大约16%的年增长率快速增加<sup>2</sup>。与此相比，在发达国家，富裕家庭数量的增长预期在很大程度上与GDP的增长保持一致。

以下事实形象地说明，市场营销人员必须行动得多快，才能跟上中国富裕消费者的变化：在今天的中国富裕消费者中，大约有一半人在四年前尚未跨入这一行列；而在5~6年以后的中国富裕消费群体中，有

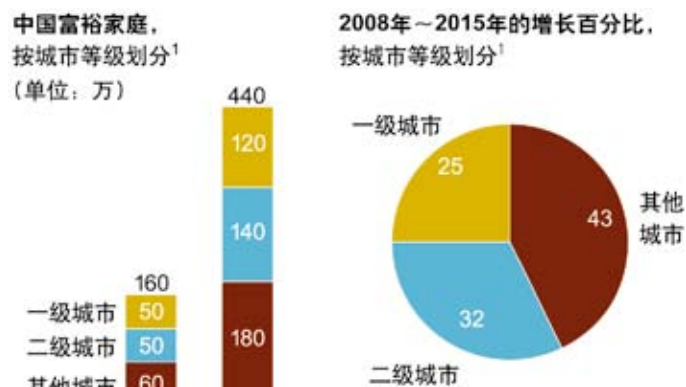


超过一半的人现在还谈不上富裕。当一个市场如此爆炸式地增长时，消费习惯可以很快改变。例如，仅仅在几年以前，中国消费者还是到国外去购买大部分奢侈消费品。而如今，他们消费的奢侈品有 60% 都是在中國大陸购买的。

在这样一个快速成长的市场中，各行各业（例如，汽车、房地产、银行服务、消费电子产品，以及其他奢侈消费品和服务）可以做很多工作来培养消费者的品味，消费习惯和忠诚度。现在购买奢侈品的中国富裕消费者中，有超过一半的人是在过去四年中才开始这种购买行为的，只有少数人能够说出任何品类的三种奢侈品品牌。

正如预计的那样，目前，绝大多数中国富裕家庭都生活在中国东部和中南地区的特大型和最发达的城市之中。中国的四个最富裕的城市——上海、北京、广州和深圳——的富裕消费者占到全部富裕消费者的大约 30%；而十大城市的富裕消费者占到所有富裕消费者的大约 50%。（与之相比，美国十大城市的富裕消费者仅占其全部富裕人口的大约 25%。）不过，这种聚集现象正在发生变化。

我们的研究表明，在未来 5 ~ 7 年中，中国富裕消费者数量的增长有 3/4 将出现在规模最大的几个大都会以外的地区（图表 1）。事实上，富裕消费者数量的增长很大一部分将出现在一些规模较小的二级城市中，其比例与规模较大的二级城市不相上下。甚至在级别更低的三级城市中，富裕群体也将扩大。由于许多这种“新富”都是企业家，以及其他一些与其居住地有着千丝万缕联系的人士，因此，我们预计，他们很少会随着收入增加而迁移到特大城市中去。



这种变化必然会迫使在中国的市场营销人员变革营销方法，目前，这些营销人员仍把目光紧盯着上海和北京，而这些城市的市场竞争已经如火如荼。那些希望抓住中国富裕家庭数量不断增加带来的全部商机的企业，千万不能像它们现在常常做的那样，忽视中国的中小城市。例如，奢侈品行业一些最大的名牌在北京有几个零售门店，但在有些地方（像成都和温州）却没有销售门店，尽管成都的富裕消费者比底特律还多，温州的富裕消费者与亚特兰大不相上下，而在美国的这两个城市，奢侈品商店星罗棋布。

## 中国的富裕消费群体并不相同

如何最好地将中国的富裕消费者作为营销目标？如果他们决定买一只手表或一个皮制手袋，他们是想要货真价实的高端品牌，还是满足于能以假乱真的仿制品？当他们要买一辆轿车时，他们更喜欢一个年轻的、星光耀眼的名流代言人还是较年长、成熟的代言人呢？他们更有可能购买一部精心定位为奢侈品牌的手机吗？

那些试图从中国的富裕消费者那里获取利润的市场营销人员需要在脑海中斟酌权衡这些问题。对于那些在其他国家（尤其是发达国家）销售奢侈品品牌的企业来说，关键在于，弄清楚中国的富裕消费者与其他国家的富人有什么区别；对于那些已经能迎合中国的主流消费者、并试图将其品牌延伸到高端市场的企业来说，主要问题是，必须了解中国的富裕消费者与国内其他收入群体有何不同之处。

我们的研究显示，这些差异比比皆是。对于任何以中国富裕消费者为销售目标群体的品牌来说，这些差异都将非常关键。

## 与世界各国富人的差异

中国的富裕消费者不同于外国富裕消费者最明显的因素之一就是比较年轻：他们大约 80% 都在 45 岁以下，与之相比，美国富裕消费者中这一年龄段的比例为 30%，而日本则为 19%。由于他们是奢侈品消费市场的新手，而且刚致富不久，因此，对奢侈品品牌知之甚少。此外，与其他国家的富裕消费者相比，中国的富裕消费者在购买任何特定奢侈品时，更重视其功能性价值（如质量、材料、设计或工艺）。发达国家的消费者在购买奢侈品时，比较看重其情感价值——例如，用于表示其拥有者的品位。与之相比，中国的富裕消费者在购买奢侈品时，对此不太在意。

这些差异对于市场营销具有很清楚的含义。例如，兰蔻（Lancôme）品牌在中国推销其抗皮肤老化的系列护肤品时，为了吸引较年轻消费者的注意，强调了尽早采取行动，防止皮肤老化现象的重要性。这种方法大幅提升了针对较年轻消费者的销售量，帮助兰蔻成为在中国最大的奢侈化妆品和护肤品牌。奢侈白兰地品牌路易十三（Louis XIII）的制造商通过更换广告，来解决其品牌知名度低的问题，它用比较简洁的广告（通常只聚焦于酒瓶和包装）替换了以奢华形象（如钢琴、骏马和游艇）为特色的传统广告。其他一些品牌承认中国消费者通过强调产品质量来鉴赏其功能性价值的特点。例如，当意大利时尚品牌杰尼亚（Ermenegildo Zegna）在中国的门店开张时，演示了其领带的制作过程，以强调该品牌的精湛工艺。

但是，为了适应中国市场而彻底改变一个品牌的全球定位也具有风险。当瑞士手表制造商浪琴（Longines）公司于上世纪 80 年代第一次进入中国时，曾推出一条专门设计的、更激进的产品线，旨在吸引中国的富人消费者。但这条产品线遭到了失败。该公司的中国市场营销副总裁 Li Li 后来解释说，当中国消费者发现，在其他国家买到的浪琴产品与在中国买到的完全不同时，他们感到十分怀疑。1994 年，该公司将其在中国的品牌形象重新定义为一种经典、高雅的品牌，与其全球定位保持一致。如今，中国是该品牌的最大市场。

## 与其他中国消费者的差异

我们的研究还显示，中国的富裕消费者与本国的其他消费者有很大的不同。当我们把富裕消费者与主流消费者进行比较时，他们在消费态度和消费行为上的差别尤其明显：例如，52% 的富裕消费者表示，他们信任外国品牌，而如此表示的主流消费者仅为 11%。富裕消费者还更愿意尝试新技术，更愿意借贷消费，而且在保持工作与生活平衡方面更有可能难以满意。

与所有中国消费者一样，富裕群体也花大量时间看电视：77% 的富裕消费者有此爱好——在列举的所有活动中，看电视的比例最高。此外，富裕消费者们花在浏览互联网上的时间要比其他收入水平群体的成员长得多。在休闲行为上的这些差别也很重要，它可以帮助市场营销人员正确设计媒体广告组合，对这些消费者施加影响。与其他消费者相比，富裕消费者还会花更多时间进行户外活动、参加体育运动、到健身房健身，以及外出喝酒吃饭。事实上，富裕消费群体的家庭收入有 17% 花在外出就餐上（主流消费者为 7%），有 10% 花在休闲娱乐上（主流消费者为 3%）。

这种行为方式不仅确认，电视仍然是影响富裕消费者的重要媒介，而且表明，互联网广告、博客以及其他在线渠道对富裕消费者的影响力可能比其他消费者更大。企业还应该记住，富裕消费者要花费大量时间走出家门，外出活动。例如，某些高档威士忌品牌会在富人们经常光顾的酒吧和俱乐部举办营销活动，而更多的品牌也可以利用这种机会。赞助各种类型的体育活动，而不仅仅关注传统上富裕消费者经常参加的体育运动（如高尔夫球），也可以帮助企业对富裕消费者施加影响。例如，手表制造商欧米茄（Omega）就一直是国际业余田径联合会的赛事之一——上海国际田径黄金大奖赛的主要赞助商。

## 找准富裕消费者细分群体

中国的富裕消费者不仅与世界各国的富人消费者以及中国的其他消费者存在差异，而且他们相互之间也有所不同：随着这一具有吸引力



的消费者群体的增长（并将继续增长），在他们之间已经出现了明显的区别。为了充分利用这些细分群体的增长，营销人员就必须深入了解它们。

在将中国的富裕消费群体分为具有不同消费态度（比如说，倾向于借贷消费、追求时尚，或明显地炫耀财富）的细分群体时，比较容易获得的人口统计信息（如年龄、性别和收入）基本上没有太大帮助。例如，尽管中国的富裕消费者总的来说可能比其他国家的富人更年轻，但他们消费态度的形成受年龄差异的影响要小于其他差异的影响。标准人口统计数据对分类相对来说不太重要的一个例外是居住地。令人相当惊奇的是，与居住在较小城市的富裕消费者相比，居住在四个最大城市的富裕消费者在储蓄上的态度更为保守，而且更加注重家庭。而不足为怪的是，他们更加信任外国品牌。

当我们在分析受访者提出的消费需求时——例如，“感觉与众不同”的需求，或“感觉财务上无后顾之忧”的需求，出现了更有意义的差别。这种基于消费需求的分析揭示出，在中国的富裕消费者中，可分为 7 种明显不同的细分群体（图表 2）。

图表2：7个细分群体

中国富裕消费者中的 7 种细分群体

	平均家庭收入 (单位: 千美元)	占全部 财产的 百分比	主要特点
<b>时尚奢华型</b>	85	22	<ul style="list-style-type: none"> <li>中国富裕消费者中收入最高的群体，主要居住在一二线城市；女性比例较高</li> <li>重视健康、环境和家庭生活品质</li> <li>对奢侈品充满热情</li> <li>走精致低调的消费路线，引领时尚潮流</li> <li>与品牌相比，更在意质量；反对水货、假货</li> </ul>
<b>苛求完美型</b>	84	13	<ul style="list-style-type: none"> <li>收入水平高于大部分富裕消费者，但工作仍然最勤奋</li> <li>偏爱有助于使他们在人群中显得与众不同的时尚产品</li> <li>不太愿意花高价买最好的产品；难以取悦</li> <li>对未来收入是否会大幅度增加缺乏信心；不喜欢借贷消费</li> </ul>
<b>浮华炫耀型</b>	78	22	<ul style="list-style-type: none"> <li>收入略高于富裕消费者的平均水平，较多成员居住在一二线城市</li> <li>舍得花钱的奢侈品大买家，喜欢炫耀；看重品牌</li> <li>不排斥水货、假货</li> <li>为了淘到便宜货，不怕麻烦，货比三家</li> <li>对自己的财务状况充满信心，但仍然勤奋工作；不太重视健康和环境</li> </ul>
<b>都市文雅型</b>	73	14	<ul style="list-style-type: none"> <li>收入低于富裕消费者的平均水平，较多成员居住在一二线城市；男性比例较高</li> <li>非常在乎健康、环境和家庭生活品质</li> <li>走精致低调的消费路线，与时尚奢华型相比，较少花钱购买奢侈品</li> <li>对产品质量比对品牌更关心；反对使用水货、假货</li> </ul>
<b>力争上游型</b>	71	8	<ul style="list-style-type: none"> <li>收入低于富裕消费者的平均水平，较多成员居住在二线和三线城市</li> <li>非常在意社会地位，渴望与有前途、有影响力的人交往</li> <li>喜欢奢侈品，但并不将其视为生活必需品</li> <li>不愿意多花钱买更好的产品；为了淘到便宜货，不怕麻烦，货比三家</li> <li>对自己的财务状况信心不足</li> </ul>
<b>脚踏实地型</b>	70	10	<ul style="list-style-type: none"> <li>比较年轻，致富和接触奢侈品的时间都不长；较多成员居住在二线城市</li> <li>与社会生活相比，更加看重家庭生活</li> <li>很少关心较高档的产品；对外国品牌基本上不感兴趣</li> <li>当他们真正花钱购买奢侈品时，他们只买低调优质的产品</li> <li>对自己的财务状况有信心，但承受来自同事的炫耀更多钱的压力</li> </ul>
<b>热衷奢侈型</b>	69	11	<ul style="list-style-type: none"> <li>在富裕群体中收入水平最低，较多成员居住在二线城市</li> <li>对奢侈品有狂热的爱好，有可能购买超过其经济负担能力的奢侈品</li> <li>非常爱炫耀；喜欢那些有助于使自己出众的品牌</li> <li>接受水货、假货；偏爱中国品牌</li> </ul>

1 美元 = 7 人民币（2008年）  
2008年麦肯锡对中国富裕消费者的调查

这种变化必然会迫使在中国的营销人员变革营销方法，目前，这些营销人员仍把目光紧盯着上海和北京，而这些城市的市场竞争已经如火如荼。那些希望抓住中国富裕家庭数量不断增加带来的全部商机的企业，千万不能像它们现在常常做的那样，忽视中国的中小城市。例如，奢侈品行业一些最大的名牌在北京有几个零售门店，但在有些地方（像成都和温州）却没有销售门店，尽管成都的富裕消费者比底特律还多，温州的富裕消费者与亚特兰大不相上下，而在美国的这两个城市，奢侈品商店星罗棋布。

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但是，为了适应中国市场而彻底改变一个品牌的全球定位也具有风险。当瑞士手表制造商浪琴（Longines）公司于上世纪 80 年代第一次进入中国时，曾推出一条专门设计的、更激进的产品线，旨在吸引中国的富人消费者。但这条产品线遭到了失败。该公司的中国市场营销副总裁 Li Li 后来解释说，当中国消费者发现，在其他国家买到的浪琴产品与在中国买到的完全不同时，他们感到十分怀疑。1994 年，该公司将其在中国的品牌形象重新定义为一种经典、高雅的品牌，与其全球定位保持一致。如今，中国是该品牌的最大市场。

## 与其他中国消费者的差异

我们的研究还显示，中国的富裕消费者与本国的其他消费者有很大的不同。当我们把富裕消费者与主流消费者进行比较时，他们在消费态度和消费行为上的差别尤其明显：例如，52% 的富裕消费者表示，他们信任外国品牌，而如此表示的主流消费者仅为 11%。富裕消费者还更愿意尝试新技术，更愿意借贷消费，而且在保持工作与生活平衡方面更有可能难以满意。

与所有中国消费者一样，富裕群体也花大量时间看电视：77% 的富裕消费者有此爱好——在列举的所有活动中，看电视的比例最高。此外，富裕消费者们花在浏览互联网上的时间要比其他收入水平群体的成员长得多。在休闲行为上的这些差别也很重要，它可以帮助营销人员正确设计媒体广告组合，对这些消费者施加影响。与其他消费者相比，富裕消费者还会花更多时间进行户外活动、参加体育运动、到健身房健身，以及外出喝酒吃饭。事实上，富裕消费群体的家庭收入有 17% 花在外出就餐上（主流消费者为 7%），有 10% 花在休闲娱乐上（主流消费者为 3%）。

这种行为方式不仅确认，电视仍然是影响富裕消费者的重要媒介，而且表明，互联网广告、博客以及其他在线渠道对富裕消费者的影响力可能比其他消费者更大。企业还应该记住，富裕消费者要花费大量时间走出家门，外出活动。例如，某些高档威士忌品牌会在富人们经常光顾的酒吧和俱乐部举办营销活动，而更多的品牌也可以利用这种机会。赞助各种类型的体育活动，而不仅仅关注传统上富裕消费者经常参加的体育运动（如高尔夫球），也可以帮助企业对富裕消费者施加影响。例如，手表制造商欧米茄（Omega）就一直是国际业余田径联合会的赛事之一——上海国际田径黄金大奖赛的主要赞助商。

### 找准富裕消费者细分群体

中国的富裕消费者不仅与世界各国的富人消费者以及中国的其他消费者存在差异，而且他们相互之间也有所不同：随着这一具有吸引力的消费者群体的增长（并将继续增长），在他们之间已经出现了明显的区别。为了充分利用这些细分群体的增长，营销人员就必须深入了解它们。

在将中国的富裕消费群体分为具有不同消费态度（比如说，倾向于借贷消费、追求时尚，或明显地炫耀财富）的细分群体时，比较容易获得的人口统计信息（如年龄、性别和收入）基本上没有太大帮助。例如，尽管中国的富裕消费者总的来说可能比其他国家的富人更年轻，但他们消费态度的形成受年龄差异的影响要小于其他差异的影响。标准人口统计数据对分类相对来说不太重要的一个例外是居住地。令人相当惊奇的是，与居住在较小城市的富裕消费者相比，居住在四个最大城市的富裕消费者在储蓄上的态度更为保守，而且更加注重家庭。而不足为怪的是，他们更加信任外国品牌。

当我们在分析受访者提出的消费需求时——例如，“感觉与众不同”的需求，或“感觉财务上无后顾之忧”的需求，出现了更有意义的差别。这种基于消费需求的分析揭示出，在中国的富裕消费者中，可分为7种明显不同的细分群体（图表2）。

图表3：优化影响



最大的两组消费者合在一起，占到由中国富裕消费者拥有的全部财富的大约70%。这种经济上的重要程度意味着，这两组消费者或许将是许多品牌的主要目标群体。为了进一步挖掘他们的消费潜力，企业还应该了解，在不同的地区、不同规模的城市之间，甚至在各个单独的城市之中，每一组消费者的相对重要性有何不同。例如，仅由“苛求完美型”消费者组成的那一个组在特大型城市中的重要性就要比在其他城市小，因为在特大型城市中，他们的财富仅占所有富裕家庭拥有财富的10%；而在其他城市中，他们的财富占到17%。

各组消费者的重要性将随着时间而发生变化。希望尽早建立品牌优势的企业，需要考虑对那些虽然如今比较小，但其重要性将不断增大的

消费者细分群体进行投资。例如，在未来5年~7年中，增长最快的一组消费者将由“力争上游型”和“脚踏实地型”消费者构成，他们大多数都生活在四大城市以外的其他快速发展的城市中。

对于许多品牌来说，更好地了解这些对消费者的分组，就能更有效地分配营销开支。例如，可以针对在某一组内的几个细分群体进行广告宣传，因为他们都共同享有一些重要特征。“热衷奢侈型”和“浮华炫耀型”这两个细分群体中的消费者往往都愿意为最贵最好的产品支付溢价，并从炫耀他们购买的这些产品中获得心理满足。对他们来说，品牌至关重要，应该引起别人的注意；一般来说，商标和营销方式都应该清晰醒目。而且，由于这些消费者非常喜欢自己中意的商标，因此，有可能将品牌成功地延伸到其他品类。不过，他们丰富的品牌知识使他们成为富有挑战性的消费者：他们执着追求最新型的产品和式样，并且期望销售人员在外表和举止上反映品牌形象。

例如，宝马（BMW）的品牌定位就能吸引这一组消费者。该德国汽车制造商在中国提供全系列的宝马产品（为了迎合中国富人，在汽车设计上有一些变动），并通过各种媒介渠道（如印刷精美的杂志、电视和互联网）大打广告，以建立广泛的品牌知名度。每年一次的“宝马汽车体验日”从一个城市轮换到另一个城市，为不同的消费群体首次展示明年将要上市的新车型，为这些消费者提供一种奢侈豪华的体验，以及试驾新车的机会。

另一个分组中的消费者由“时尚奢华型”和“都市文雅型”细分群体组成，尽管他们也愿意为自己喜爱的品牌支付溢价，但他们对炫耀这些产品的兴趣要小得多。他们对自己喜爱品牌的最新产品和最佳产品情有独钟，而且具有更高的品牌忠诚度。但他们认为，产品或服务的品质要比品牌的吸引力更重要。

为这一组消费者服务的企业应该提供广阔的产品选择范围和优质服务，但为这些消费者提供的产品切忌太花哨和太惹眼，营销方式也必须更巧妙。贵宾卡制度和特别的营销活动（如每次只接待几位顾客的新一季产品预展）可能会比大规模营销活动效果更好。由名人代言这些品牌时，应该反映品牌的成熟与完美，对品牌的过度曝光可能反而有害。手表制造商百达翡丽（Patek Philippe）公司在中国的营销战略就会吸引这些消费者：例如，该公司为中国大陆两家旗舰店所选的位置（其中一家在具有历史意义的前美国大使馆旧址）就散发出一种古老和传统的韵味。

中国富裕消费者的数量在快速增长，这使他们成为所有奢侈品和高档品牌的目标群体。但是，这并不是一个秘密，针对这一具有吸引力的消费者群体，许多企业都在制定自己的目标。为了使自己的营销努力价值最大化，并且与这些消费者建立持久的关系，它们就必须了解这些消费者与其他市场的富裕家庭、与中国的其他消费者，以及他们彼此之间有何不同。只有这样，企业才能赢得中国富裕消费者的信任和忠诚，并在塑造他们不断演变的品味和购买行为上发挥作用。

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#### 注释：

- 1 在“解读中国”网站 <http://insightschina.bymckinsey.com> 上可以看到完整的研究报告。
- 2 如需了解有关这一预测的更多信息，请参见刊载在麦肯锡全球研究院网站 <http://mckinsey.com/mgi/> 上的城市化研究报告“迎接中国10亿城市大军”。

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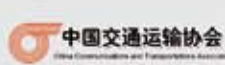
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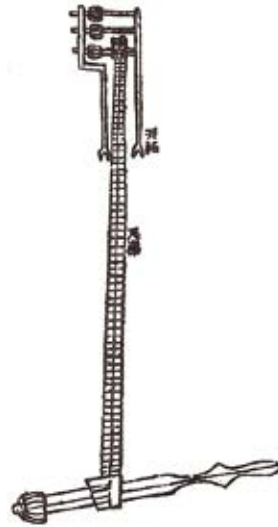
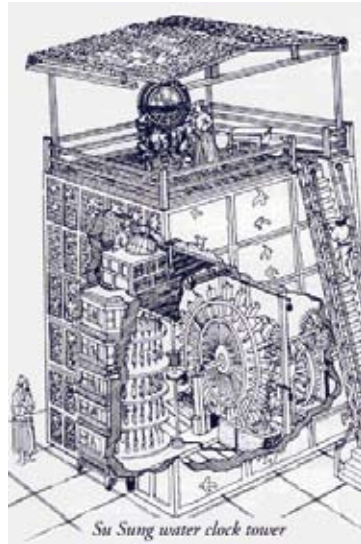
# 600 Years Ahead of Time

## The world's first mechanical clock wasn't invented by Swiss but by the ancient Chinese

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



Mercuria



In 2008, Switzerland set a new record in exports by selling over US\$14.7 billion dollars worth of watches. The largest single destination for these timepieces was Hong Kong, who purchased three billion dollars worth. However, most notable, was a 46% increase in sales to China, who bought over a billion dollars worth of watches. Names like Rolex, TAG Heuer, Omega, Breitling and Jaeger Le Coultre are just some of the hundreds of brands of Swiss watches that carry that very special tag "Swiss made", which symbolizes both quality and an expensive price tag. Indeed, this year saw the debut of an ultra luxurious Swiss Watch brand with prices starting at a recession-breaking US \$350,000 a piece. So what makes these watches so special, and why is this industry so uniquely part of Swiss culture?

The story goes back well over 400 years to the Swiss city of Geneva, where the manufacturing of high quality and exclusive Swiss watches has always been based. In 1574, a French watchmaker, Charles Cusin moved from France to Geneva; and it is from this man's direct efforts that gave rise to the multi billion dollar Swiss watch making industry of today. Charles Cusin probably had no idea that his moving to Geneva would have such a far reaching effect upon history, but today, this industry employing thousands of people and making billions of dollars worth of goods, can be directly traced back to his move to Geneva.

Not long after he arrived, Charles Cusin worked towards founding the now exclusive Watchmaker's Guild of Geneva,

which established a set of rules and standards for fine watch making. These standards have persisted through the centuries and even today, a watch has to meet 12 exacting criteria in order to carry the "Geneva seal" that indicates it has been crafted to meet these exclusive standards. One hundred years after the founding of the guild, Geneva produced five thousand watches a year, with one hundred masters of the guild and three hundred apprentices. By 1800, Geneva had nearly six thousand watchmakers and jewellers, and produced fifty thousand timepieces a year.

### The Japanese quartz invasion

Thus the Swiss watchmaking industry expanded and prospered right up until the early 1980's when Switzerland's history and splendid tradition of innovative watchmaking, came under the crucial threat of being swept aside by new quartz technology. Quartz watches rely on piezoelectric material that vibrates at a particular frequency when captured within an electric field. This technology was used extensively by Japanese watch manufacturers to produce large numbers of inexpensive and extremely reliable quartz watches.

This Japanese quartz invasion, delivered a blow of atomic proportions to the Swiss watchmaking industry, and so many solid and cherished Swiss brands disappeared overnight. In one year alone, the sales of Swiss watches dropped by over 25 percent.

But to their credit, the Swiss watch industry rebounded by

competing head on with the Japanese. In 1983, they created the Swatch brand, which was a brilliant fusion of style and technology that mirrored the fashion preferences of the day, yet offered a quartz movement under an analogue dial. It is interesting to note that the number of parts used to produce a Swatch were reduced to around 60 percent of those employed in standard models at the time; and great economies were achieved by robotics and single assembly lines.

### 600 years before anyone else

Today, the Swiss still hold the crown for the manufacturing of both the highest quality time-pieces and the en-mass production of designer fashion watches like Swatch. And, it appears these items are highly prized by the Chinese who are rapidly becoming one of their largest customers. Now this is a rather strange twist of fate, as history records that, indeed, it was the ancient Chinese themselves who actually invented the world's first mechanical clock 600 years before anyone else. So how and why did they achieve this?

Since the ancient Chinese believed that the perceived movements of the stars were closely related to the destiny of China and its emperors, for thousands of years they recorded their movements with great attention. In fact, some 2'200 years ago, Chinese documents already had entries on what later came to be known as Halley's Comet. The record of the comet, which appeared in 613 BC, is recognized as the earliest mention of Halley's Comet in the world. Also, the earliest record of a solar eclipse that can be verified, appears in a bone inscription dating back to the Shang Dynasty. Studies have proved that the solar eclipse recorded actually took place on May 26, 1217 BC, thus proving that it was the first reliable record of an eclipse that man ever made.

### Water-powered cosmic engine of Su Sung

So in the 11th century (around the time of the battle of Hastings in England), a Chinese official called Su Sung ended up constructing the world's first mechanical clock. Standing at over 30 feet tall and running from 1092 to 1126AD, the greatest of all Chinese medieval clocks was known as the water powered cosmic engine of Su Sung. This clock had all kinds of displays that not only told you what time it was, but where the sun was as it rotated in an armillary sphere to keep in tune with

the Heavens.

So why did the Chinese - more than other cultures - need to know the precise hours of the day and positions of the planets? The answer is not what you might imagine. The Emperor of China was truly a cosmic figure, and his every move was regulated in conjunction with the heavens. His heirs were determined not by their order of birth but by the exact determination of their conception and these moments were by design, not by accident. A quote from a book at the time records... 'His yang force had to be matched with a yin force of equal measure so for most nights the Emperor slept with nine women at a time'. And as the Son of Heaven, his every move had to be measured with as much accuracy as was humanly possible. Thus, Su Sung's clock was the ideal instrument. After the fall of the Song dynasty, Su Sung's clock was dismantled and moved to what is now Beijing. But it was not maintained properly, and in 1195 it went out of action after being struck by lightning, and the high art of Chinese clock-making completely disappeared with it.

In Europe, the first mechanical clocks appeared around 1300, during the time of the Mongols - which suggests the idea could have come from China, perhaps through the Islamic world, where clocks did appear just after Su Song's clock went out of action. Nearly 300 years later, when the first Jesuit missionaries arrived in Beijing in around 1600, they wanted to impress the Chinese court with the whole of the new European cultural package in an attempt to make their religion more attractive. One of the things they brought with them, were European mechanical clocks. These clocks completely fascinated the Chinese, which begs the question: How did the ancient Chinese lose their knowledge on the mechanical measurement of time?

The 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... conclusion not finished?

Mercuria.MCG, (a division of Mercuria Energy Trading), produced "Legacy of China" scheduled for international release in 2010.

WORLD ECONOMIC FORUM  
NATION OF IMMIGRANTS  
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41'285 KM<sup>2</sup>  
BEST BOND-GIRL EVER  
WATCHES  
REGA  
SWISS MADE  
WILLIAM TELL  
GENEVA CONVENTION  
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FEDERAL WRESTLING FESTIVAL  
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MOTORWAY VIGNETTE  
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# 早了600年的发明

## 世界上第一台机械钟是中国人而不是瑞士人发明的

作者：盖瑞·麦卡宾，《中国·源》执行制片人

2008年，瑞士在出口方面创下新高，共出口了价值147亿美元的手表。这些计时装置最大的单一销售目的地是香港，采购额达30亿美元。然而，最引人注目的却是中国。2008年瑞士手表在中国的销售额增长了46%，其采购额超过10亿美元。

像劳力士、豪雅、欧米茄、百年灵、积家这些品牌，只不过是数百个瑞士手表品牌中的一部分，均带有象征着品质与高价的“瑞士制造”这一独特标签。

实际上，今年一款刚刚上架的超奢华瑞士手表品牌，每块表最低价35万美元，该价格显示瑞士制表业已走出经济衰退的阴影。是什么使得这些手表如此特别？为什么制表业能在瑞士文化中享有如此特别的地位？事情的根源一直要追溯到400多年前的瑞士日内瓦城，高品质的瑞士手表通常都是在这里制造的。

1574年法国制表匠查尔斯·库辛从法国移居到日内瓦。正是由于他的不懈努力，才造就了今天瑞士年产值几十亿美元的制表产业。

查尔斯·库辛也许没有意识到他移居日内瓦会在历史上产生如此深远的影响。但现如今，这个雇用了数千人、年产值几十亿美元的产业，却可直接追溯到他移居日内瓦。

搬到日内瓦不久，查尔斯·库辛着手建立日内瓦制表业者协会，该协会制定了一套生产优质手表的规则与标准。这些标准一直沿用了几个世纪，即使在今天，一块手表要想贴上表明其符合这些专门标准的“日内瓦”标签，就必须达到12项标准。该协会成立一百年后，日内瓦已有100名制表师和300名制表学徒，每年能生产5000块手表。到1800年时，日内瓦已有6000名制表师和珠宝师，每年生产50000块手表。

### 日本石英表的冲击

就这样，瑞士制表业规模不断扩大，欣欣向荣，直到20世纪80年代，瑞士富有创新精神的制表历史与优良传统，才受到新的石英表技术的严重冲击。

石英表依靠的是压电材料，该材料在电场中会按一定频率振动。日本手表制造商利用这种科技大量生产廉价但走时却特别准的石英表。日本石英表的“入侵”，不亚于向瑞士制表业投放了一颗原子弹，一夜之间，许多经营基础稳固、倍受世人尊敬的品牌消失了。仅仅一年时间，瑞士手表的销售额就下降了25%。

但由于信誉卓著，瑞士制表业开始反击，正面迎接日本人的挑战。1983年，瑞士人创立了斯沃琪（SWATCH）品牌，该品牌手表把反映当前流行趋势的款式与科技完美集合起来，并在模拟指针表盘下装上了石英机芯。

有意思的是，由于使用机器人技术和单一组装线，生产斯沃琪表所需的部件数比当时标准模式下生产手表所需部件数减少了约60%，从而大大节约了成本。

### 比别人早了600年

如今，瑞士人仍然拥有生产顶级计时设备和生产像斯沃琪之类大规模生产的时尚手表两项桂冠。中国人似乎尤其钟爱这些东西，并正在成为这些产品最大的消费群体之一。现在看来这似乎是命运的奇特安排。

历史记载显示，实际上是古代中国人发明了世界上第一个机械钟，比世界其他地方要早600年。中国人为什么又是如何做到这一点的呢？

古代中国人相信，星辰的运动与中国及其帝王的命运息息相关，他们极其细致地记录下星辰的运行情况。大约2200年前，中国的文献已经有关于后来被称为哈雷彗星的记载。对出现于公元前613年的彗星的记载，被认为是世界上对哈雷彗星的最早记载。此外，可以验证的关于日食的最早记载要追溯到中国的商代，它最早出现于甲骨文中。相关研究已证明该日食发生于公元前1217年5月26日，从而表明它是第一个人类关于日食的可信记录。

### 苏颂的水动力机械钟

11世纪，大约在英国哈斯庭战役期间，一名叫苏颂的中国官员建成了世界上第一台机械钟。

这台由苏颂发明的天文机械高30英尺，由水提供动力，从公元1092年一直运行到1126年，是中世纪中国最伟大的时钟。

这台钟可显示多种信息，不仅能显示当前的时间，还能显示太阳在浑天仪中的运行位置，与天象保持一致。

为什么中国人比其他文明的人需要更准确地掌握时间和星体的位置呢？答案可能会出乎你的想象

中国的皇帝真正是与星象息息相关，他的一举一动都随天象而动。决定皇位继承人的并不是子嗣的出生先后顺序，而是根据受孕的确切时间。这些时间都是经过精心计算的，并不是随机的结果。

当时的一本书上作了如下记载：“皇上的阳气需配以等量的阴气，因此，大多数晚上皇上一次要与九名女子同眠。”

作为天子，他的一举一动必须尽可能做到与天同步。因此，苏颂的钟就是非常理想的工具。

宋朝灭亡后，这台钟被拆解并运送到现在的北京。然而由于保管不善，1195年该钟遭到雷击并停止运行。中国高超的造钟工艺也随之彻底失传了。

欧洲的第一台机械钟出现于公元1300年左右的蒙古人统治时代。这表明，欧洲关于机械钟的想法也许来自中国，也许是经由伊斯兰人之手传过来的。因为恰巧在苏颂的钟停止运行之后，伊斯兰世界就出现了机械钟。

大约300年后的公元1600年，第一批耶稣会传教士来到北京。他们想通过展示整个欧洲新的文明成果，给中国的朝廷留下深刻印象，以增加他们宗教的吸引力。他们带来的物品之一就是欧洲的机械钟。

中国人被这些钟完全迷住了。这不禁让人发问：古代中国人利用机械计时的知识是如何失传的呢？

您在电视系列剧《中国·源》中可以找到问题的答案。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。

《中国·源》由摩科瑞MCG制片公司（隶属摩科瑞能源贸易公司）制作，将于2010年全球发行。



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# “Concept From Child to Building”

Children's needs are the core focus of the school, says architect Daniel Heusser of Virtuarch

Interview, Fabian Gull



**Daniel Heusser:**  
“Additional donations are still needed”



**How did the idea of building up a school after the devastating earthquake in Sichuan in 2008 evolve?**

Different companies, organisations and many individuals were looking for possible ways to help. Many children had died in schools which could not withstand the quake. My company does a lot of school projects in China and I wanted to contribute in a field I was experienced in. Key driver in this project was the Swiss agro-chemical company Syngenta who maintains an excellent relationship network in the Province of Sichuan - which is of crucial importance when building a public school. So everything got together, Swisscham Shanghai took the lead and got a lot of support from Swisscham Beijing and the Swiss Embassy.

**How much had been donated?**

To date, we have collected funding of over RMB 7 Million. Luckily, donors responded fast and very positively.

**How much is needed?**

Just about this amount.

**Can people still donate?**

Yes. Up to today the main expenses, being everything that's construction related, is financially secured. But additional donations for furniture, planting of vegetation, toys and playground equipment are still needed.

**When is the official handover to the local authorities scheduled?**

Construction and decoration are foreseen to be completed in May 2010. When the children will actually move in, is not exactly fixed yet, and will be decided by the authorities. The civil construction is almost finished and we currently work on facades, corridors and landscaping.

**From the official handover onwards, will SwissCham still be involved somehow?**

As we believe it is most sustainable if the school is run by locals, we target an entirely independent school both operationally and financially. We do not want to create any long-term dependence on Swisscham. Part of the contingency will be allocated in teaching materials and in a maintenance fund. And one of the donors has arranged for teacher's training at his colleges.

**Which was the most critical project phase?**

As all land is state owned and therefore under direct control of the authorities, the earthquake triggered also new allocation of plots. In some areas of Sichuan Province, even entire villages were decided to be rebuilt at different locations. Our plot was originally not foreseen to host a school and had to



undergo the legal process of zoning in. This was a challenging phase, as we had little influence in matters of city planning and permits.

***The quake hit Sichuan in May 2008. Why did it take a full two years till completion?***

It's all relative. Or do you know any kindergarten in Switzerland that has been planned and completed from scratch in only two years? And don't forget, right after the earthquake, the top priority was relief work in order to save people and provide food and shelter. The reconstruction phase followed later, with the plot being finally allocated around one year after the earthquake.

***Tell us something about your design ideas.***

As trivial it may sound - a school is a place for children. But it is something that is not always reflected in a schools' architecture. Some schools I went to, for example, resembled more of barracks (smiling). The core focus of the concept is based on the children's needs. We designed each classroom as an individual one story

building in a different colour. The colour concept aims to create classrooms having a "homelike" atmosphere. There are low windows and from every classroom there is a direct access to the outdoors. Every classroom features its own playing field and a little garden. In this environment, kids have a lot to discover which shall be stimulating to their learning. Everything is thought from "child to building". And not the other way round.

***What about earthquake safety?***

All buildings are designed according to the newest and very strict Chinese Earthquake Regulations. Our design concept is focusing on single-storey buildings, which have a much better chance to withstand earthquakes.

***The plot is very long and narrow...***

... which is a very unusual and not necessarily ideal shape for a school. The land plot is 300m long and 50m wide. We decided to create intimate spaces by freely placed individual pavilions. Another design element is a covered corridor that functionally links all buildings. It is

undulating through the plot and from a bird's view, it looks like two dragons. Overall, it is quite an experimental design. In a best case scenario, the project will be considered as role model of how schools can be built. For once, I would not mind getting copied (smiling).

***There are solar panels on the rooftop.***

Yes. They provide warm water supply to the toilets of the classrooms.

***Construction knowledge and money are available in abundance in China. Is foreign aid really needed to build a kindergarten?***

Generally you are right. The earthquake showed that China is clearly a country that is able to cope even with such devastating natural disasters. To make use of an analogy - in the end, it all comes down to the question of what do you do when your friend's car is broken? Do you step in and help, or let him handle the problem on his own? It is totally up to you! China can build cars and yet there are foreign cars in China. That is not contradictory at all. Rest assured, our contributions were very well received.

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# “将孩子的需要放在建筑设计的首位”

德建建筑设计Daniel Heusser认为学校建筑应以满足孩子的需求为核心

访谈：方必安

**2008年四川发生灾难性地震后，你们是怎么产生建设学校的念头的？**

Daniel Heusser：当时许多企业、组织和个人都在以尽可能的方式为灾区提供帮助。我听说由于教室不太坚固，一些孩子在地震中不幸遇难，而我们公司在中国做过许多与学校相关的项目，于是我就想在我们比较有经验的领域为灾区贡献一份力量。当时这个项目主要是由在四川省具有很好的关系网的瑞士农业化肥企业先正达（Syngenta）推动的，因为良好的关系网对于建立公共学校来说十分重要。通过中国瑞士商会上海分会牵头，北京分会和瑞士驻华大使馆的大力支持，将各方面的资源组织了起来。

**你们一共筹集到多少善款呢？**

迄今为止，我们已经筹集到了700多万元。很庆幸的是捐赠者都很积极，我们很快就筹集到了资金。

**你们需要多少资金呢？**

大概就是这个数字。

**现在还需要捐款吗？**

是的。目前与建筑相关的主要费用已经筹集到了，不过还需要用来购买教学设备、铺设植被、课外活动器材和操场设备的资金。

**你们计划什么时候将学校正式移交给当地政府呢？**

预计可以在2010年5月完成建设和布置工作，不过学生开始上课使用的时间并没有确定，这将由当地政府决定。建设工作已经差不多结束了，我们现在正在进行学校外观、走廊美化以及校园绿化工作。

**学校正式移交给当地政府后，瑞士商会还会参与学校以后的管理事务吗？**

我们认为最可持续的方法是让当地人来管理学校，我们的目标是建立运营上和财务上完全独立的学校。我们不希望学校长期的依附于瑞士商会，我们可能偶尔会在教学材料和维护方面提供支持。另外，一位捐助者已经安排了学校的教师在他的大学里接受培训。



**Daniel Heusser:**

“学校仍需更多捐款”

**这个项目的哪个阶段是最关键的？**

由于中国土地实行国有制，因此土地使用是由政府决定的。地震后，政府对土地进行了重新分配。在四川省的一些地方，有的村庄甚至被集体搬迁重新建设。我们建学校的地方本来是有其他用途的，因此需要一些法律程序来改变其用途。这个阶段比较困难，因为我们对城市规划和审批并不熟悉。

**四川地震发生在2008年5月，为什么建设这所学校花了整整两年的时间？**

这是相对而言的。你有没有听说过瑞士哪个幼儿园从最开始规划到完成只花两年的时间？更何况地震发生后，首要的工作是救援，解决食物和住所的问题，之后才是建设阶段。更何况我们的那块土地是在地震近一年后才拿到的。

**可以跟我们介绍一下你们的设计理念吗？**

我们都知道，学校是孩子们学习和玩耍的地方，但是许多学校的建筑往往并没有体现出这一点，比如我去过的一些学校看起来更像是军营（笑）。

我们的设计理念是以孩子的需求为根本，将每间教室都设计成不同颜色的一层楼建筑，所用的颜色为教室营造了一种“家”的氛围。教室的窗户很低，每个教室都有一扇直接通往室外的门，每个教室都展现了其独有的游戏区域和花园区域。这样的环境有助于吸引学生进行探索、激发学生去学习。整个设计都是先考虑孩子的需求，然后再考虑建筑的需求，而不是反过来。

**学校的抗震能力如何呢？**

学校的所有建筑都是根据中国最新最严格的抗震条例进行设计的，我们的设计理念是以单层建筑为主，以增强建筑的抗震能力。

**据我所知，学校的地形很狭长……**

……是的，这对于学校来说不太常见，也不是最理想的地形。这块土地长300米，宽50米，因此我们打算通过教学楼的零散分布来制造一些空间。我们的设计的另外一个元素是一条封顶的走廊将所有的教学楼连接在了一起，形成波浪状，如果从空中看的话，仿佛是两条长龙。总的来说，整个设计具有很强的实践性，这个项目还可以作为学校建筑的典范，在这一点上，我不介意有人模仿（笑）。

**你们在教学楼的屋顶上安置了太阳能设备。**

是的。这些设备可以为教室的厕所提供热水。

**中国并不缺乏建筑知识和建设资金，你认为中国真的需要外国援助建设幼儿园吗？**

你说的没错。这次地震显示出中国具有足够的应对恶劣自然灾害的能力。不过我想做一个比方，就是当你朋友的汽车出问题的时候，你会怎么做？应该帮助朋友，还是不插手由朋友自己解决问题？这完全取决于个人！中国有自己的汽车品牌，同时也进口国外的汽车，这并不相悖。我们确信无疑的一点是我们所做的一切都是十分受欢迎的。

# SwissCham Beijing

Swiss Ball 2009 – “The Arena is Yours”

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## Specials 商会要闻

November 28, 2009 – “Swiss Ball 2009 - The Arena is Yours”

“The award for this year’s most creative ball goes to the Swiss one. After all, what could have been more spiritually uplifting than a return to the sweet childhood memories of holding cotton candy in a sweaty little hand, and waiting impatiently for the beginning of a circus?”

The Global Times

And this was not just any circus, on 28 November 2009, SwissCham Beijing and the Swiss Society Beijing brought the atmosphere of the Swiss National Circus Knie to the Crowne Plaza Sun Palace’s Grand Ballroom and presented an evening rich in colors and performances. Clowns and magicians entertained the guests during the cocktail before the opening of the ballroom’s doors in a background of festive circus music. The guests could then admire the ballroom’s decoration recreating the tent and a 10-meter wide circus arena in the center.



Winfried GEYMEIER and LIU Jiehui (Swisstyle Design) being entertained by a magician-clown during the cocktail



The Ball room recreating a tent



The Ball room in a circus atmosphere

The first act of this memorable evening featured distinguished guests such as H.E. Ambassador of Switzerland, Mr. Blaise GODET, together with the President of SwissCham Beijing, Mr. Peter TROESCH, and the President of Swiss Society Beijing, Mr. Christoph KOEPEL, who officially opened the Ball addressing a few welcoming words to the audience.



From left to right: Christoph KOEPEL, Swiss Ambassador to China, H.E. Mr and Mrs GODET enjoying the shows



Peter TROESCH, President of SwissCham Beijing with his wife



Christoph KOEPEL, President of the Swiss Society Beijing



Felix SUTTER and Urs LAEUPPI, Directors of SwissCham Beijing, moderators of the evening

The guests had then the chance to taste Crowne Plaza Sun Palace Chef’s delicate cuisine and selected wines all served by a crowd of waiters dressed in clowns with Swiss flags on their cheeks. As it has now become a tradition, the dinner was followed by the Swiss chocolate buffet full of creative pastries made by a chocolate master specially appointed for this occasion. Guest could also enjoy an exquisite coffee in front of a 10-meter elephant poster.



A waitress holding candy floss





*The exquisite Chocolate buffet*



*Entrance of the 'Circus' with a 10-meters elephant poster*

Three circus shows were presented during the Swiss Ball. The first one was a diabolo juggling clown performance. The second one was the Icarian Umbrella acrobatic show where a couple of two acrobats swung and swirled the umbrellas on the tips of their feet whilst taking dangerous acrobatic poses. The last act and highlight of the evening was a show performed by the Inner-Mongolian Acrobatic Troupe where four agile young acrobats were heaved on high pitched unicycles and given metallic bowls that they threw with their foot to make them land on the top of their head.



*The Icarian Umbrella Acrobatic Show*



*The Inner-Mongolian Acrobatic Troupe*

The over 300 attendees were treated to a night filled with enchantment, music, dance and gifts. Funds were also raised to support the Swiss Community Project – School Reconstruction in Sichuan, up to RMB 22,000 were raised from the sales of lucky draw tickets with great prizes including a business-class flight ticket to Switzerland with Swiss and Lufthansa. The guests then took over the Arena and enjoyed the rest of the night dancing on music from the 1980s, stirring up nice nostalgic memories.



*Anna & Robert WIEST (Swiss Re)*



*Krystyna MARTY and Christoph LANG (Embassy of Switzerland)*

Special thanks go to the sponsors and partners of what a lot of people call "the best Swiss Ball ever", without whom this ball would not have been such a success. These were in particular our Platinum Sponsor Swiss Re, our Gold Sponsors Holcim, Nestle and Crowne Plaza Sun Palace, our Silver Sponsors Novartis, SGS, UBS, Zurich Insurance and MQ Wines, and our Bronze Sponsor LEM. Other companies have contributed to the success of the evening, such as our chocolate sponsor Lindt & Sprüngli, the exclusive coffee sponsor Nespresso, our ice cream provider Moevenpick and Ricola. A special thanks to the organizers of the Swiss Ball 2009: Yvan SPRUNGLIN, Batiste PILET, Martine DROUX and Felicitas SOHM REUBI.



*The organizing team of the Swiss Ball 2009*









## Events Review 活动要闻

**1 September 24, 2009 – “Employer Branding and Power of Corporate Culture in China”**

SwissCham Beijing and EUCCC organized an afternoon seminar on "Employer Branding and Power of Corporate Culture in China: Examples of Global Best Practice and Process" at the China World Hotel. The two guest speakers, Mark BALDWIN, Managing Director of Oxus China and Jeremy PERKS, Head of Mindset Matters Group China, shared their views on the terms of employer branding and corporate culture, gave us examples of global best practice and process, and mapped out the strategy for HR management.

**2 October 14, 2009 – “Managing Risks related to the A/H1N1 Pandemic”**

SwissCham Beijing and the Embassy of Switzerland organized an evening seminar on "Managing Risks related to the A/H1N1 Pandemic: A Governmental and Business Perspective" at the Crowne Plaza Sun Palace. The event was the occasion for several officials from the Chinese and Swiss Government as well as from Swiss companies active in China to inform about their risk management strategies from a governmental, economic and business perspective. The event included the participation of three speakers: H.E. Blaise GODET, Ambassador of Switzerland; Markus REUBI, Science Counselor, Embassy of Switzerland; and LIAO Qiaohong, Centre for Disease Control CDC. Two panellists also shared their views: Chloe WANG (on behalf of Robert WIEST), Vice President, Client Markets, Swiss Re, and Veronique DUCASSY, Managing Director, Kuoni Travel. The event was moderated by Felix SUTTER, Vice President, SwissCham Beijing.

**3 October 15, 2009 – “Sino-Swiss Forum on Legislation on Climate Change”**

This Members only event was hosted by the Beijing Raffles in a form of a roundtable. The aim was to select three companies who would participate in the Sino-Swiss Forum on Legislation on Climate Change with the Chinese government a week later. Walter MEYER, Counsellor/Development, Embassy of Switzerland, talked about the aim of this meeting with the Chinese counterparts, which was to have a first talk on the Legislation on Climate Change

issues. The companies attending this roundtable were Mercuria, Pöyry, South Pole Carbon, Wenfei and Swiss Re. Urs LAEUPPI, Director of SwissCham Beijing, moderated the talks.



*From left to right: Jeyanthi GEYMEIER (Committee Manager at SwissCham Beijing), Urs LAEUPPI (Director of SwissCham Beijing), Walter MEYER (Embassy of Switzerland), Pierre-Alain AVOYER (Mercuria), Caspar CHIQUET (South Pole Carbon), Christoph KOEPEL (Wenfei Law Firm), Chris CUI (Swiss Re) and Joanna ZHANG (Pöyry).*

**4 October 22, 2009 – “Francophone Inter-Chamber Networking”**

SwissCham Beijing, the Benelux Chamber of Commerce in China, the French Chamber of Commerce in China, the Canada China Business Council and the Jeune Chambre Economique des Français de Pékin were pleased to organize a Francophone Networking Cocktail at the Face Bar. This event gave the opportunity to get to know new business affairs, activities and services of the chambers while using the French language.

**5 October 29, 2009 – “Young Professionals' Forum: Where Tomorrow's Leaders Meet”**

This fourth young professional forum, and last one of the year had for topic "Insurance Industry Development and its Opportunities for Young Professionals". It was organized at the Crowne Plaza Sun Palace and gathered around 60 participants. The two speakers, Robert WIEST, Managing Director, Swiss Re China and Member of the Asia Management Team together with Ken ZHAO, General Manager, Zurich Insurance, were given the opportunity to present the market development of the insurance industry and explain how the young professionals should prepare themselves in the frame of their career.

A special thanks to our sponsors China Europe International Business School (CEIBS) and Crowne Plaza Sun Palace for their support.



*Nicole WANG (Swiss Business HUB)*



*From left to right: Yvan SPRUNGLIN, Jeyanthi GEYMEIER and Batiste PILET (SwissCham Beijing), Ken ZHAO (Zurich Insurance), Robert WIEST (Swiss Re), Ivy YANG (CEIBS) and Urs LAEUPPI (Director at SwissCham Beijing and moderator of the forum)*

**6 November 10, 2009 – “Ambassador's Briefing”**

SwissCham Beijing organized an event with H.E. Blaise GODET, Ambassador of Switzerland to China, during which he spoke of the main issues and current developments in Sino-Swiss relations. Ambassador GODET gave an overview of the recent and upcoming developments of the bilateral relations of Switzerland and China and discussed current economic and political issues. The event took place at the Kempinski Hotel Beijing Lufthansa Center, and attracted over 50 participants.





H.E. Blaise GODET, Ambassador of Switzerland from Lovells

## 7 December 3, 2009 – “IP Infringement and Enforcement in China”

SwissCham organized a roundtable with the LTC Committee on IP Infringement and Enforcement in China. SwissCham member Mercuria offered its conference room as the venue of this event. Horace LAM, Partner and Head of Intellectual Property (IP) Practice from Lovells, gave an overview on IP right protection and on recent developments in Chinese IP law. Yannick ROULIN, Head of the Economic and Commercial Section at the Swiss Embassy in Beijing, reported on the recent Sino-Swiss IPR dialogue, including the meetings between the Chinese Ministry of Commerce (MOFCOM) and officials from the Swiss Intellectual Property Office (IPO).



Horace LAM Partner and Head of Intellectual Property (IP) Practice



Yannick ROULIN, Head of the Economic and Commercial Section at the Swiss Embassy

## 8 December 15, 2009 – “Christmas Networking”

SwissCham Beijing and EUCCC organized a cozy and high end Christmas Networking at Raffles Beijing's Jaan Bar. This last event in the year 2009 gathered over 100 people and was a good opportunity to get together before halting for Christmas.

## 9 January 13, 2010 – “New Year's Networking”

SwissCham Beijing, EUCCC, the China-Italy Chamber of Commerce and the German Chamber of Commerce in China set up a New Year Networking at Hilton Beijing's Zeta Bar. This was the first event in the New Year 2010 and a good occasion to start business with new resolutions. The Bar was filled with more than 200 people, which showed a good dynamism for business in 2010.



Jean-Marc IMHOF (Fert) and Yannick ROULIN (Embassy of Switzerland)

## New Members 新会员

### Corporate Members



#### Mr. James HUANG

Company: **Bertrams Chemical Plants Ltd. Beijing Representative Office**

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### Young Professional Members

#### Ms. Anneliis LEHTMETS

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# SwissCham Shanghai

SwissCham AFG Chinese New Year Gala 2010A  
&  
SwissCham AFG CEO/Entrepreneur of the Year Award

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## Events Review 活动要闻

**1 January 29th 2010 – SwissCham AFG Chinese New Year Gala and CEO/Entrepreneur of the Year Award**

On Friday, January 29th SwissCham held its biggest annual event to celebrate Chinese New Year with the Swiss Chinese business community of Shanghai. Following the theme of the tiger, the Hyatt on the Bund had been elaborately decorated and welcomed its over 270 guests in a South Chinese jungle landscape. After the opening speeches from SwissCham China President Christian Guertler and the Consulate General of Switzerland Mr. William Frei a colorful entertainment program showed a fire performance, an energetic African Dance troop and a futuristic fluorescent dance. A tricky smelling quiz had tables guessing exotic jungle smells and the lucky draw once again held an array of great prizes such as two Omega Collectors Watches from Swatch Group (China) or two Business Class tickets sponsored by Swiss International Airlines.

One of the evening's highlights was the announcement of the prestigious SwissCham AFG CEO/Entrepreneur of the Year Award. With Susan Chen, President of Swatch Group (China) the jury honored her achievement in multiplying the company's revenue several times and a strong build up in staff. Withstanding the global slowdown the Swiss watch manufacturer increased its Chinese sales and secured China as its number one market. Susan Chen successfully adapted global strategies to the local consumer reality, quickly localized management staff and through public engagements like the main sponsorship of the Olympic Games 2008 and the establishment of an Art Centre at the Shanghai Peace Hotel, managed to grow strong roots in the Chinese market. Mr. Christian Guertler (President of SwissCham China and Shanghai), Mr. William Keller (Jury President & honorable Citizen of Shanghai) and Dr. Edgar Oehler (one of Switzerland's most outstanding entrepreneurial personalities and former member of parliament) presented the award to the happy winner.

After the ballroom lights went out and the official program had ended, the party continued in the legendary Vue Bar, high above the roofs of Shanghai.













## 2 November 18, 2009 – Outsourcing vs. Intellectual Property in China

The well visited event once again showed that IP is always a topic that draws attention, especially in China and especially in connection with out-sourcing. Mr. Alan Fung (Partner, Ad-visory of KPMG China) illustrated the rise of China as one of the world's key outsourcing destinations and emerging from a low-cost and low-technology workshop to a source for service and R&D. Some of the key drivers for this development are government investments in technology, education and infrastructure in combination with China's strong entrepreneurial culture and strongly growing domestic markets. As multinationals increasingly outsource processes and functions to dedicated service providers, the importance of identifying, controlling and monitoring associated risk such as intellectual property, can take on greater importance and meaning. Clement Ngai (Special Counsel, Baker & McKenzie LLP, Shanghai) gave a vivid insight on property rights protection precautions. The lively Q&A showed, that most of the participants had experienced IP challenges and had a lot to share with other guests.



Alan Fung (KPMG) & Nicolas Musy (SwissCham Shanghai)



Aurelie Diller, Michael Pothier (Bobst)



Paz & Patrick Mueller (DRM)



## 3 October 22, 2009 – 16<sup>TH</sup> Young Professional Gathering – Logistics In China – Level Playing Field

Mr. Markus Rodatz (Head of Operations Greater China of Panalpina World Transport (PRC) Ltd.) gave an interesting comparison on the differences and characteristics between Western and Chinese logistic markets. Different from other large global players, Panalpina does not have its own logistical infrastructure, but works closely with different local partners. Especially in the Chinese market, which is highly fragmented and its supplier landscape constantly changing, Panalpina has acquired great expertise on how to be successful over the years of its activities in China. As always, finger food and drinks were at hand and added to the events famous young fun factor.



Markus Rodatz (Panalpina), Michael Lehmann (SwissCham Shanghai)

## 4 November 19, 2009 – 17<sup>TH</sup> Young Professional Gathering – Media In China

Who but long time Chinese media veteran Tim Murray (CEO Ringier China) could give a more in depth and entertaining insight on the media landscape in China. He gave an overview of how information and media is controlled and influenced by Chinese authorities, but still developing in breadth and quality at a fast pace. Especially Online media, which in comparison to the West still have a comparably small market share, are predicted a bright future in growth and revenue. On the editorial side, lifestyle content is still one of the booming sectors. A vivid Q&A was followed by a leisure evening of cheers and beers.



Michael Lehmann (sim), Tim Murray (Ringier)



From left: Jasmin Helbling & Sarah Edmond (both Swiss Consulate General)

## 5 December 17, 2009 – Vacheron Constantin Mansion Christmas Tale

Santaclaus came early for our members in 2009. SwissCham, sim and Vacheron Constantin offered an extraordinary glimpse into the amazing world of Swiss watch making art and culture. In the marvelously historical setting of the Twin Villa, Alexandre Kerguen (Swiss Master Watchmaker, Vacheron Constantin) op<sup>ww</sup>ened some high complication time-pieces and shared he's experience and passion with the enchanted guests. A truly memorable Christmas evening in an extraordinary environment. The party continued in the private Key Club.





Alexandre Kerguen (Vacheron Constantin)



Fabian Biedermann (SwissCham)



Jenny Hui &amp; Alexandre Kerguen (Vacheron Constantin)

## 6 January 11, 2010 – Prospect and Sentiment on the Chinese Economy for 2010/11

After such an eventful year, what could have been better than an evening of hearing the insights of Dr. Jianwei Wu (Vice-Dean, School of Economics and Management of Tongji University), who talked about China's expected economic developments, challenges and opportunities. Nicolas Musy (SwissCham Member of the Board) presented results from the extensive SwissCham Business Sentiment Survey 2010. Swiss and European companies in China were participating in this survey which has been conducted by SwissCham in cooperation with CEIBS (China Europe International Business School). The survey focuses on business sentiment and intentions of Swiss companies in China in terms of expansion plans, salary increases, IP

issues and development of their R&D.



Dr. Jianwei Wu (Tongji University), Ernst Roth (SwissCham Shanghai), Nicolas Musy (SwissCham Shanghai)



Dr. Jianwei Wu (Tongji University)

## 7 January 21, 2010 – Shanghai as a New World Financial Center?



From left to right: Patrick Van Overloop (KBC), Piter de Jong (ING), Prof. Horst Loechel (German Centre of Banking and Finance), Patrick Bressers (Rabobank), Henry Ma (Deloitte), Robert Chen (King & Wood Law Firm)

On the 21st of January, an interchamber event was organized at the Sofitel

Shanghai. The topic of this event was Shanghai as the new world financial center. Seven financial experts gave their view on the financial industry in Shanghai. After the presentations, a panel discussion took place in which the around 100 participants could share their ideas and questions with the panel. The event was concluded with a lunch and networking possibilities.

### New Members 新会员

#### Corporate Members



#### Sunny Xu

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#### LOSBERGER

#### Frank Gaenzle

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#### Petra Wittlin

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## Chamber News 商会新闻

### New Swisscham GZ Website

Since January 2010 the Guangzhou Chapter has its own website. Please visit us under [www.swisscham-gz.org](http://www.swisscham-gz.org) and find information's and downloads for all our activities.

### Newsletter

From February 2010 onwards our members will receive a bi-monthly newsletter. This flyer will be distributed to our members by e-mail and is also on our website available.

## Events Review 活动要闻

### 1 January 18th 2010.China View's

Our first event in 2010 starts with great guests: The Ambassador of Switzerland in China, Blaise Godet, the Consul General of Switzerland in Hong Kong Dr.Hans J.Roth, the Consul General of Switzerland in Guangzhou Mr.Werner E.Nievergelt and the director of Swissnex Shanghai Dr.Flavia Schlegel. All of them made with their presentations this event a great success.



Ambassador of Switzerland in China, Mr. Blaise Godet



From left: Martin Bannwart, Swisscham GZ board member and Claudio Mazzuchelli Director of Swiss Business Hub in China.



Ambassador of Switzerland in China Mr. Blaise Godet (left) & Urs Calonder, President of Swisscham Guangzhou.



Consul General in Guangzhou, Werner E. Nievergelt & Dr. Flavia Schlegel (Swissnex)



Consul General of Switzerland in Hong Kong, Dr. Hans J. Roth (left) and Ambassador of Switzerland in China Blaise Godet.



The Intercontinental Hotel Shenzhen was offering an outstanding hospitality! Beside our friends living in the pearl river delta, we were pleased to welcome several colleagues from the Swisscham Hong Kong at this event.

## Upcoming Events 活动预告

### • March 26th 2010

West meets China or China meets West. Presentation by Urs Calonder, Swisscham GZ President.

### • April 16th 2010

Company visit in the PRD.

### • May 14th 2010

The Swiss Business Hub in China. Presentation by Claudio Mazzuchelli Director of Swiss Business Hub.

## New Members 新会员

### Corporate Members

Company: **SwissAV Ltd.**, Shenzhen Represented by Urs Boesinger



Company: **IVP Electronics Ltd.**  
Address: Long Hua Industrial Park, Fuyong, Baoan, Shenzhen. Represented by Armando Moll



Company: **GECON Ltd.**  
Address: Fenghua Dasha, Boluo County Huizhou City, Guangdong Represented by Alex Baumgartner



Company: **CALTECH engineers & consultants ltd.**  
Address: GPO Box 1866, Witty Comm. Bld. 1107, Tungchoi Street, Mongkok, HK Represented by URS Calonder

### Individual Members

Mr. Franz Birrer, Shenzhen  
Mr. Ivan Bitterli, Shenzhen

### Associate Members



**The INTERCONTINENTAL SHENZHEN**  
9009 Shenan Road, Shenzhen  
Represented by Paul Hugentobler



## Events Review 活动要闻

**1 October 7, 2009/November 5, 2009/  
December 3, 2009/January 7, 2010 –  
Monthly Young Professional Cocktail**

Swiss Young Professionals and friends usually meet for a casual after-work cocktail in DROP, King Ludwig and Anchor's Point. These events attract over 50 young executives to mingle and network in an informal ambiance.



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

**2 October 6, 2009 - Joint Chamber Human Resources Breakfast Seminar**

This breakfast seminar was presented by Tzeitel Fernandes of Hewitt and Catherine Loui of ING Asia Pacific Ltd. Participants gained an insight into their specific view on rewards in the current economic environment and an overview of the salary trends in Hong Kong, Greater China and the Asia region.

**3 October 12, 2009 – Monthly Lunch with the Swiss Association of Hong Kong**  
Held once every four years, the East

Asian Games is a major event in the international sports arena. After Shanghai, Pusan, Osaka and Macau, Hong Kong won the host for the hosting right of the 5th Games. During the lunch, Mr. Wan Wai-Lun, Head of Publicity & Marketing of 2009 East Asian Games (Hong Kong) Ltd gave us an insight on the organization of such a monumental event, the challenges to overcome and all the highlights.



(Left to Right) Wan Wai-Lun (Speaker) and Stefan Basler, President of the Swiss Association



Participants enjoy the networking and Lunch at the Hong Kong Club

**4 November 2, 2009 – Joint Business Lunch with Donald Tsang, Chief Executive of HKSAR**

Serge G. Fafalen, President of Swiss Chamber Hong Kong

Members were invited to the joint business community lunch with Mr Donald Tsang, the HKSAR Chief Executive, on November 2 at Hong Kong Convention and Exhibition Centre. Mr

Tsang gave further elaboration on his policy speech and participants learned more about the initiatives put forth by the HKSAR Government and the year ahead.



Over 1000 participants from various sectors of the business community attended the event



Donald Tsang, Chief Executive of HKSAR made the presentation

**5 November 2, 2009 – Monthly Lunch with the Swiss Association of Hong Kong**

Hong Kong maritime history is a vast topic. Starting from the early days with the recurring pirate problem. Hong Kong's modern shipping industry began in the 1840s. Later came steam ships and finally the triumph of the motor ship. The result, 1945-2000, was a period of enormous expansion and a great transformation of Hong Kong's shipping industry. Throughout, however, the soul of Hong Kong shipping was the junk trade. Dr Stephen Davies, Director of Hong Kong Maritime Museum, made a presentation on "junks and ships, gunboats and pirates – Hong Kong's Maritime story".

**6 November 11, 2009 - 41st International Chamber Young Professional Cocktail**

Swiss Chamber Hong Kong is one of the main organizers for the 41st International Chamber Young Professional Cocktail which was held on November 11 at The Mira. 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 went to the Youth Outreach, a local charity established as a crisis intervention centre for youths in Hong Kong. Participants enjoyed the networking evening as well as winning some attractive lucky draw prizes.



(Left to Right) Winnie Kan and Michael Schweizer of the Consulate General of Switzerland in Hong Kong



Benjamin Mueller-Rappard, Director and Young Professional Representative of the Swiss Chamber Hong Kong, is the Master of Ceremony for the evening

## 7 November 12, 2009 – Breakfast Coaching Seminar

Coaching as a development tool is now gaining recognition for its effectiveness and is being widely used in international companies. During the seminar, Benny Wong, Siru Heino and Harriet Brooke, Executive Coaches and Consultants at True Colours HR Solutions Ltd shared their expertise and experience to explore how coaching can foster organizational culture and success of a company in the modern world. Participants learned the coaching process and how it help align employees to the culture for ongoing success.

## 8 November 12, 2009 – Joint Chamber Personal Development Network Cocktail

This joint chamber cocktail was organized by The alphasight Institute. Members have a great opportunity to understand oneself and others better, communicate more effectively, enhance teamwork and develop management and leadership abilities. Presented by Greg Barnes and David Koutsoukis from Australia, this was a lively, informative, musical and memorable cocktail which included fun, entertainment, networking and personal development.



From Left: Anne Thiesen of The alphasight Institute and Walter Marthaler of Union Mark Holdings Limited



From Left: Helen Cheng of EC21 Language and Communication Solutions Limited, Irene Leung of Azona and Irene Lo of Swiss Chamber Hong Kong

## 9 November 19, 2009 – Visit to the Hong Kong Science Park



Participants at the Hong Kong Science Park Campus



From Left: Ken M.K. Fung and Anthony Tan of the Hong Kong Science Park are ready to make presentation to the participants

Hong Kong Science Park was hosting this event for members to get an insight into how the Park supports local and overseas companies to grow and become successful. Members also had a chance to visit 3S Industries Ltd, the first Swiss company at the Hong Kong Science Park. Complimentary coach pick up was arranged for members and their friends for this visit.

## 10 November 27, 2009 – Joint Cocktail with Swedish Chamber

Joint cocktail with Swedish Chamber was held on November 27 at FINDS. Members of both chambers enjoyed the opportunity to mingle with each other.



From Left: Dagmar Winkler and Susanne Sahli of Swiss Chamber Hong Kong

## 11 December 7, 2009 – Christmas Lunch with Swiss Association

Ms. Su-Mei Thompson and Dr. Mike Yao of the Women's Foundation presented "The status of women and girls in Hong Kong – Academics and achievements" during the Christmas lunch on December 27 at the Hong Kong Club. Members enjoyed the presentation as well as raffle draws with proceeds to the Women's Foundation.





From Left: Mr Eric Kotz and Mrs Katherine Kotz, together with another couple, Mrs Cecile Hora and Mr Francois Hora



From Left: Stefan Basler of the Swiss Association and Speakers: Su-Mei Thompson and Mike Yao

## 12 January 11, 2010 - Monthly Lunch with the Swiss Association of Hong Kong



From Left: Peter Bussinger, Peter Krismer and Andreas Vogelsanger of RBS Coutts Bank Limited



Speaker: Yonghao Pu

Asia has been leading the global economic recovery in 2009, helped by its

own solid economic fundamentals and stimulus policies. While the region is in a much better shape, it is facing critical challenges in 2010. With a depressed labor market in the West and the policy tightening firstly in this region, questions remain whether Asia will be able to nurture its fresh roots of growth amidst sluggish global demand and rising energy prices, and whether Asian stock markets will mount a sustainable recovery. Mr. Yonghao Pu, Head of Wealth Management Research Asia-Pacific and Chief Investment Strategist, UBS, presented his view on a new economic journey amidst the unwinding of global imbalances, the deleveraging of Western consumers, and the implications of these developments on regional investment.

### 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  
Tel/电话: no. (852) 2524 0590  
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Email/电邮: admin@swisschamhk.org or www.swisschamhk.org

### • 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  
Email/电邮: bmr@themirahotel.com

### New Members 新会员

#### Corporate Members



#### Bruce Stinson / Anne Thiesen

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