

SwissCham China Business Sentiment Survey 2012:

First Confidence **Drop in Four Years** & Concerns About **World Economy** 

四年来信心指数首次下滑 全球经济成首要隐忧



The state of the s

**McKinsey Survey:** 

China's Ever Confident **Consumers** 中国的 乐观消费者

The Chinese **Viewpoint: Impressions** of Living in **Switzerland** 旅居瑞士的 印象和轶事

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#### Dear Members and Readers

December 11, 2011 marks the 10th anniversary of China's membership in the World Trade Organization (WTO). In this period, China has increased its imports six fold and has become the largest exporter of manufactured goods. The integration into the global trading system, the reform and opening-up are certainly key factors for this remarkable success. Also, China's trading partners have benefitted substantially in the last decade from reduced trade barriers. This is also true for Switzerland which has a trade surplus with China. To further grow, additional reforms and reduction of trade barriers, e.g. in the form of a Free Trade Agreement (FTA), are essential. We hope that the FTA negotiations progress well and an agreement can be reached soon.

The dept crisis in Europe and the U.S. has seriously affected the global economy. This, together with credit tightening in the local market, also impacts Chinas economy. Not surprisingly, the confidence of business leaders in China is lower than last year. Read more about the results of the "4th SwissCham China Business Confidence Survey" in this issue of The Bridge. More than 100 business leaders and SwissCham members across China participated in our annual survey.

Swisscham China has developed well in 2011 with many good events, publications and activities. Personally, I am very satisfied that we have been able to strengthen the relationship between the different chapters in Beijing, Shanghai, Guangzhou and Hong Kong. At this occasion, I would also like to mention the excellent cooperation with the Swiss Embassy and the Swiss Consulates.

For the upcoming spring festival I wish you some relaxing days with your family and a successful year of the dragon.



Ernst Roth

President Swisscham Shanghai

#### 亲爱的会员和读者朋友们:

2011年12月11日是中国加入世贸组织(WTO)十周年纪念日。在这十年里,中国的进口额增长了六倍,中国已成为世界最大的制成品出口国。中国的改革开发制度以及中国融入到全球贸易体系中显然是中国在贸易领域获得成功的关键因素。此外,中国的贸易伙伴也在过去十年里从降低贸易壁垒方面获益匪浅。这对于与中国保持着贸易顺差的瑞士来说同样如此。为了两国间贸易的进一步发展,在诸如自由贸易协定(FTA)等领域的改革和降低贸易壁垒也是十分重要的。我们希望两国间的 FTA 谈判顺利进行并尽快达成协议。

欧洲和美国债务危机对全球经济产生了十分严重的影响。加上中国国内目前的信贷紧缩政策,中国的经济也受到了挑战。因此,中国商界精英的信心指数比往年低也就不足为奇了,在我们对 100 名参与者进行的调查结果中对此有详细的介绍。

中国瑞士商会在 2011 年取得了长足的发展,我们举行了许多会议和活动,季刊也一如既往的成功出版。我很高兴的看到在这一年里我们的北京、上海、广州和香港分会之间的联系更加紧密起来。在此,我还想提到的是瑞士领事馆和瑞士大使馆间的良好合作对我们工作的帮助和促进。

在春节即将到来之际,我祝愿您和您的家庭度过一个愉快而放松的节日,龙年快乐!

Emst Roth 中国瑞士商会上海分会总裁





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### Administrator \_ SwissCham Shanghai Publisher \_ SwissCham Shanghai

Editor in Chief and Managing Editor\_Fabian Gull
Editors\_Jeyanthy Geymeier (Beijing) / Leonard Perriard
(Beijing) / Benjamin Mueller-Rappard (HongKong) /
Manuela Kim (Shanghai)

Editorial Committee\_Ernst Roth / Kenny Zhou / Patrick Scheibli Nicolas Musy / Daniel Heusser / Ken Goenawan / Fabian Gull / Irene Lo / Jeyanthy Geymeier

Marketing and Communication\_Fabian Gull

English / Chinese Translations\_Speed Technology Shanghai /

Jina Sun / Manuela Kim

Proof Reading\_Jina Sun / Manuela Kim / Nicolas Luginbuehl /

Rebecca Steudler

Layout Design\_Ringier China

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Cover Picture 郑斌

### **Circulation and Advertising Contacts**

发行及广告联络处

#### - Shanghai

Address: Room 1612, No.1388 Shan Xi North Road, Shanghai / Post

Code: 200060

上海市陕西北路1388号银座企业中心1612室(200060)

Tel: +86 21 6149 8207

E-mail: thebridge@sha.swisscham.org

#### - Beijing

Address: Room 1108, Kunsha Center Building No 1, 16 Xinyuanli,

Chaoyang District, Beijing / Post Code: 100027

中国北京市朝阳区新源里16号琨莎中心1号楼1108室(100027)

Tel: **+86 10 8468 3982** 

E-mail: info@bei.swisscham.org

#### - Guangzhou

Address: 4th Floor, 9C Xingye Road, Torch Hi-tech Zone, Zhongshan

City, Guangdong / Post Code: 528437

广东省中山市火炬开发区出口加工区兴业路 9号 C幢厂房4楼

Tel. +86 760 8858 1020

E-mail: info@gz.swisscham.org

#### - Hong Kong

Address: c/o Consulate General of Switzerland, Suite 6206-07 Central Plaza, 18 Harbour Road, Wanchai, Hong Kong 香港湾仔港湾道18号中心广场6206—07室

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Designer\_ Zheng Jinrong

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SwissCham China Business Confidence Survey 2012

# Less Confident Than a Year Ago

"SwissCham Business Confidence Index" drops for the first time in four years. "Global economic slowdown" tops list of biggest concerns.

### 信心指数下滑

Written by\_**Fabian Gull**, Shanghai 作者 **方必安** 上海



### Salary, taxes, inflation: China is getting more expensive. Plus, finding and retaining talent remains a top concern.

工资、税收、通货膨胀<u></u>在中国经营的成本越来越高。 找到并留住人才仍是首要担忧。

The overall business confidence of the Swiss business community in China is falling. More than a hundred survey participants and SwissCham members across the country expressed a lower confidence for successfully doing business in China compared to last year. Both the short term and mid term expectations are decreasing. Confidence for the period of the next five years falls sharply. But, and that's the good news, it remains at a comfortably high level which is significantly higher than in the crisis year of 2009. 57% of the companies plan to grow "better" or "much better" in 2012.

To the surprise of many, China lived through the crisis of 2009 relatively unharmed. The sharp decrease in China's exports due to weaker demand could be compensated to a large extent by the massive stimulus package the Chinese government launched in 2010. And the Chinese continued to shop, so both consumption and consumer confidence remained strong. The external shock helped to cool down the overheating economy; and finally, after a series of ineffective interest rate hikes, inflation returned from a critical to a more manageable level. Regardless of the global financial crisis of 2009/2010, China's resilient economic constitution was also reflected in a growing confidence of Swiss business leaders in China. This was in 2009.

Today, the situation is a different one. The double dip slowdown, which many experts were so sure would not happen, is a current

reality in the U.S. and parts of Europe. More importantly, the outlook for those regions is predominantly gloomy. In contrary to the crisis of 2009, and for the first time after four years of growing confidence, the survey participants' confidence level goes down. The confidence index for 2012 scored at 75%, lower from 79% last year. The drop in confidence for the upcoming five years is even more remarkable: While scoring on a record high 81% a year ago, the overall mid term confidence falls sharply at 76.7% (see chart 1 below). Participants were asked to rank their confidence on a scale from zero, meaning "no confidence at all", to ten, representing the "highest possible confidence".

### 69% plan to invest more

But, there is plenty of good news, too. Despite the cutback on a high level, the Swiss business community in China seems significantly more confident than the average confidence a similar survey brought to light (conducted by CEIBS in fall 2011 amongst 131 foreign executives in China). Their index for 2012 is at 66.7%, which is 11% lower than the SwissCham index. For the next five years, the CEIBS survey participants are 10% less confident than the Swiss managers.

We were also interested in finding out about the expectations for the development of the participants business in China in 2012 in comparison to the growth of the local market in their specific industry or sector. Our findings reveal a positive picture: 38% of the participants expect to grow "as market", 39% expect to do "better"

Chart 1

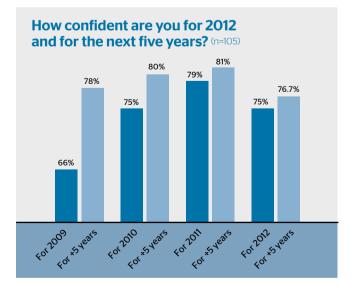
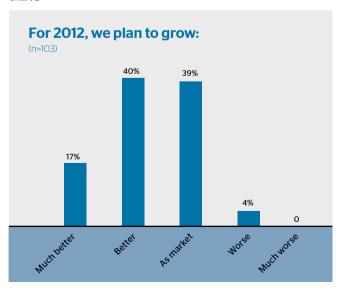


Chart 2



### Cover Story

and 17% to do "much better" than their respective market average. Only 4% anticipate a worse performance. In other words: 57% of the companies expect to outperform their respective market in 2012 (grow "better" or "much better"). Kindly refer to chart 2.

This paints a very positive picture as well for investments. 69% of the participants say, that their subsidiary's total investments in China in 2012 will be higher than last year. 10% plan to invest as much as last year, and only 6.6% plan to invest less than 2011. Not a single manager plans to divest. The average expected industry growth is with 13.9% (median 10%) much higher than GDP growth for China is forecasted for 2012.

### "New" major concerns

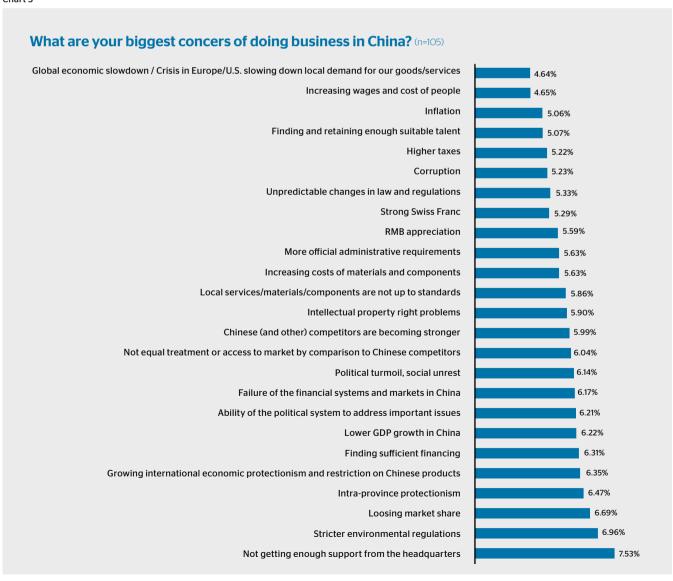
A look at this year's biggest concerns, reveals a very different picture from a year ago (see chart 3 and 4). Concerns over a global economic slowdown and the crisis in Europe in the U.S. top the list of biggest issues. Interestingly, worries about a global economic slowdown were to be found at the bottom end of the ranking last year, which makes it the climber of the year. Together with concerns

about "intra-province protectionism" and "unreasonable customer expectation", it was one of the participants' least concerns a year ago.

This year's top concerns can be summarized as follows: China is getting more expensive. Plus, finding and retaining talent remains a major concern. The participants are wary about higher cost, be it increasing wages and cost of people, higher taxes or inflation. One example of increasing cost of people is the introduction of the new social insurance scheme for foreigners working in China (see related article on page 34).

Whereas the gloomy global economic outlook is rather an external factor, China managers will have to deal with the other concerns which are "home made". The survey participants are not concerned about a slowdown of GDP growth in China, though. A clear sign that more and more manufacturing companies - which comprise the biggest share of respondents (see participants' info charts) - produce for the global markets and hence more fear a slump in external demand. 57% of the participants say, they produce in China and sell to the global markets, 12% sell to the Asian markets and 31% uniquely sell their products within China.

Chart 3



#### Chart 4

### The top 5 biggest concerns 2012 (n=105)

- Global economic slowdown/crisis in U.S. and Europe
- 2 Increasing wages and cost of people
- 3 Inflation
- 4. Finding and retaining enough suitable talent
- **5** Higher taxes

### The top 5 biggest concerns 2010 (n=42)

- Ta Finding & hiring suitable talent
- 2. Unclear, changing & inconsistent laws/regulations
- 3. Stricter & more difficult regulations to fulfill
- 4. Global economic slowdown
- **5.** Local products/services are not up to necessary standards

### The top 5 biggest concerns 2011 (n=54)

- Finding and retaining enough suitable talent
- 2. Chinese competitors getting stronger
- **3** Unfair advantages of Chinese competitors
- 4. Increasing cost level
- 5 Unclear and changing laws and regulations

### The top 5 biggest concerns 2009 (n=60)

- Global economic slowdown
- 2. Increasing wages & cost of people
- 3. Finding enough suitable talent
- 4 Inflation
- 5. Unpredictable changes in law&regulations

The ranking continues with worries regarding corruption, unpredictable changes in laws and regulations, then followed by currency related concerns, as both the RMB and the Swiss Franc are and were under appreciation pressure, making exports from China and Switzerland more expensive. This adds further to the cost increases mentioned before. Turbulence in the Euro zone and a weakening US Dollar led to a strong appreciation of the Swiss Franc in 2011, making Swiss exports drastically less competitive on the global markets. Despite the Swiss National Bank stepping in and not allowing the Euro to go below 1.20 Swiss Franc, cost pressure and the pressure to innovate remain high on companies calculating in Swiss Francs. "Chinese competitors getting stronger" is the biggest loser, ranking 14th, down form the second rank last year.

Taking a look at the bottom part of the ranking, the survey also brings to light that the Swiss business community definitely can't complain about one thing: "Lack of support from the headquarters". Also, stricter environmental regulations, fears of losing market share or intraprovince protectionism are non-issues. The CEIBS survey participants current top five concerns are: (1) Finding and retaining human resources, (2) Chinese competitors getting stronger, (3) unclear, changing and inconsistent laws and regulations, (4) lack of understanding and support from headquarters and (5) IP related problems.

### Headcount and salaries to go up

When it comes to hiring people, a full 66% plan to increase their total number of employees in China. 14% plan to stay at a similar level, 5% want to decrease labour force in China and another 14% does not know yet whether there will be any changes. Most companies intend to increase their headcount between 5-20%.

This leads us to the development of salary levels. 35.7% of the respondents expect salaries to increase in 2012 same as inflation - given an average inflation rate in 2011 of around 5%. The biggest part of the participants (56% to be precise) intend to raise salaries by

more than inflation, and 7% by less than inflation. Of those intending to increase salaries in 2012, 56% answered the increase would be between 5-10%. 18.7% want to increase between 0-5%. And 21% even plan to give a raise of 10-15%. The average cost per employee including social charges and bonuses in RMB per year is RMB 72000 (cost based on respondents demographics biased on services). Regarding ownership, 90% are wholly owned companies and 10% have a Joint Venture with a Chinese company.

In recent years, wages in more developed coastal areas of China increased sharply. This kick started a trend of shifting workforce to more rural and cheaper areas in China. However, 72.4% of the companies have no such plans. But 10% plan to shift, and a high 17.3% is not sure about it yet.

37.6% have no R&D activities in China, hence, a high 62.4% do have such activities in China. 55% of those who do R&D, do so for the global markets, whereas 15% do it for the Asian markets. A high 30% do R&D exclusively for the Chinese market (charts 5/6), such as Schindler (see interview on page 26)

### **Business Confidence Survey 2012**



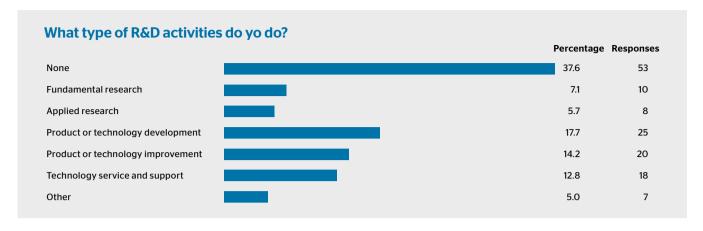
For the fourth consecutive year, SwissCham China conducted its annual business sentiment survey amongst its members across Mainland China and Hong Kong. We are aiming to find out about Swiss business leaders' confidence in successfully doing business in China, as well as their perceptions, expectations and major concerns. We would like to thank all the respondents for their participation!

### 2012年商业信心指数调查

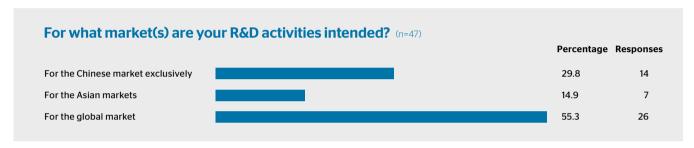
这已经是中国瑞士商会连续第四年对其位于中国内地和香港的会员进行年度商业信心指数调查,我们的目的是调查瑞士商业领导人对于在华成功经营的信心指数,以及他们的认识、期望和主要忧虑。十分感谢所有调查对象的参与!

### Cover Story

#### Chart 5



#### Chart 6



### "中国瑞士商会商业信心指数"四年内首次下滑, "全球经济增长放缓"成为最大隐忧。

华瑞士商业团体的整体商业信心指数出现下滑。一百多名调查对象和遍布中国各地的瑞士商会会员表示对在中国经营获得成功的信心指数相对于去年同期下降,对未来五年的信心指数更是大幅下滑。不过,令人欣慰的是,信心指数仍保持在高位。有57%的企业计划在2012年实现"更好"或"好得多"的增长。

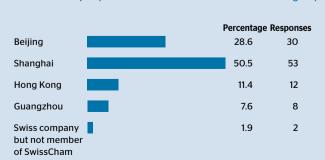
出乎大多数人意料的是,中国受到 2009年金融危机的冲击相对较小。2010年 中国推出的大规模经济刺激计划在很大程度 上弥补了由于外部需求疲软所引起的出口骤 减。加上中国消费者的消费实力没有减弱, 因此,中国的消费和消费者信心指数仍保持 坚挺。此外,外界动荡冷却了原本过热的经济;在一系列的调高利率等政策后,通货膨 胀也从高位慢慢回落过可控范围内。撇下 2009 - 2010 年的全球金融危机不谈,中国 的经济弹性也反映在 2009 年以来在华瑞士 商业领导人不断提高的信心指数上。

然而,目前的经济形势已经发生了变化。 许多专家认为不会发生的经济二次探底目前 正在美国和欧洲部分地区上演。更重要的是,

### **Participate Info**



I am/our company is a SwissCham member in the following city:



### **Legal Form:**

The legal form of your subsidiary is:



对这些地区未来的经济预期仍以悲观为主。与 2009 年的金融危机不同,调查对象的信心指数在连续四年增长后,今年首次出现下滑。2012 的信心指数水平为 75%,低于去年的 79%。而调查对象对未来五年的信心指数更是大幅下滑:从去年的 81% 下降到今年的 76.7%(见图表一)。我们要求调查对象以 O - 10 表示信心指数, O 表示"完全没有信心",10 表示"信心十足"。

### 69%的调查对象计划增加投资

好消息是,尽管信心指数有所下滑,在 华瑞士商业团体的信心指数水平远高于类似 的其他调查(2011年秋季中欧国际工商学院 (CEIBS)对131位在华外籍高管进行了调查) 所得出的平均水平。该调查所得出的2012年 信心指数仅为66.7%,比中国瑞士商会的调 查结果低11%。而对于未来五年的信心指数, CEIBS得出的结果比中国瑞士商会的结果低10%。

此外,我们还发现调查对象对自己企业在 2012年的增长信心与本地市场同行业的平均增长预期相比十分乐观:38%的调查对象预期其企业增长将与"市场持平",39%预期企业增长"好于市场",17%预期企业增长比市场平均水平"好得多"。只有4%的调查对象认为企业增长会弱于市场平均水平。也就是说:57%的企业认为在2012年他们的企业业绩将会好于其所在行业的平均水平("更好"或"好得多")。参见图表 2。

在投资方面我们也发现了同样积极的结果。69%的调查对象表示2012年企业在中国的投资将高于去年,10%计划保持去年的投资水平,66%计划投资略低于2011年,不过还没有人表示将停止投资。2012年行业平均增长水平预期为13.9%(中间值为10%),高于中国预期的GDP增速。

### "新"忧虑

今年调查对象的最大忧虑与去年十分不同(见图表3、4)。调查对象最大的担忧是全球经济增长放缓和欧洲、美国经济危机。有趣的是,在去年的忧虑排行榜上,对于全球性经济增长放缓的担忧排在最末尾,与"跨省保护主义"和"不合理的消费者预期"一样都是调查对象最不担心的因素。

今年的最大担忧可以概括为:在中国经营的成本越来越高。另外,找到并留住人才仍是主要忧虑之一。在成本提高方面,调查对象意见不一,有的更担心工资上涨和劳动力成本提高,有的更担心税收增长,还有的担心通货膨胀。劳动力成本提高的一个例子是在华就业的外国人参加社会保障计划的推出(相关文章见34页)。

如果全球经济前景暗淡只是一个外部因素,那么中国经理人仍要面对其他"国内"忧虑。调查对象并不担心中国 GDP 增长会出现下滑,由于越来越多的制造型企业——占调查对象多数(见调查对象信息图表)——面对的是全球市场,因此他们对于外部需求衰退更忧虑。57%的调查对象表示,他们在中国生产,销往全球,12%表示销售针对亚洲,31%的调查对象表示其产品只销往中国。

排在后面的忧虑还有对腐败的担忧、对不可预期的法律法规变化的担忧。还有关于货币的担忧,由于人民币和瑞士法郎都面临升值压力,使中国和瑞士的商品变得更昂贵。这也进一步提高了在上文中所提到的成本。欧元区动荡以及美元贬值都使瑞士法郎在2011年大幅升值,瑞士商品的价格竞争力也大幅下降。尽管瑞士国家银行及时介入,将欧元兑瑞士法郎的汇率保持在12以上,但以瑞士法郎为交易货币的企业仍承受着较大的成本和创新压力。"中国企业的竞争实力越来越强"从去年的第二位下滑到今年的第14位。

从位于忧虑排行榜榜尾的因素来看,瑞士商业团体都将"总部支持力度不够"排在末尾。另外,更加严格的环保规范、害怕失去市场份额以及跨省保护主义对于瑞士商业团体来说都不是问题。CEIBS 所做调查的忧虑排行榜前五位分别是:(1)找到并留住人才;(2)中国企业的竞争实力越来越强;(3)法律法规不清晰、变化和不一致;(4)总部的理解和支持力度不够;(5)知识产权问题。

### 员工人数及工资将增加

在员工方面,66%的调查对象计划增加在中国的雇员人数,14%计划保持目前的雇员人数,5%计划减少员工人数,另外14%尚未决定是否增加或减少员工人数。大多数企业计划增加员工人数5-20%。

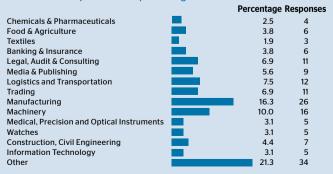
而在工资方面,35.7%的调查对象预期2012年的工资增幅将与通货膨胀率持平—2011年的平均通涨率为5%。大部分调查对象(56%)预期工资增幅高于通货膨胀率,7%表示工资涨幅将低于通货膨胀率。所有计划在2012年提高工资的调查对象中,56%表示增幅将在5-10%,18.7%表示增幅为0-5%,21%表示增幅将该10-15%。包括社保和奖金在内的每名员工每年的平均成本为72,000元。在调查对象中,90%为独资企业,10%为中瑞合资企业。

近年,位于中国较发达沿海地区的工资水平大幅增长,市场上出现了企业将工厂转移到农村或劳动力更便宜地区的趋势。不过,72.4%的企业还没有这样打算,10%的企业计划转移,17.3%的企业尚未决定是否转移。

376%的调查对象表示在华没有研发活动。也就是说62.4%的调查对象在华拥有研发活动!在华拥有研发活动的企业中55%所进行的研发活动针对全球市场,15%针对亚洲市场,30%针对中国市场,如迅达。(见p26)

### **Business Segments:**

In what industry/sector are you doing business in China?



### **Type of Product & Activity:**

Chose your subsidiary's types of product/services in China.



**Position:** 

CEO/MD/President: 59%



A McKinsey survey highlights how fast the market is changing. And: Chinese consumers are more confident this year than in 2010 about their financial prospects.

Written by **Yuval Atsmon** and **Max Magni** of McKinsey 作者 **安宏宇、马思默** 麦肯锡

The Chinese have taken to consumerism with ease, embracing thousands of new products, services, and brands. But the flipside is that the Chinese market changes at a speed capable of leaving all but the nimblest of companies breathless, as McKinsey's 2011 survey of Chinese consumers highlights. Three findings stood out. Even in the face of rising inflation, Chinese consumers are more confident this year than in 2010 about their financial prospects. Among urban consumers, the number of first-time buyers – a group that has been a major driver of category growth in China – is declining. Finally, although brand awareness is rising, we see little sign that brand loyalty is following suit. In fact, more and more consumers choose among a growing number of favorite brands.

These and other findings from this year's survey have clear implications for companies seeking to capture the next wave of consumer-spending growth in China. Any broad-brush approach to winning consumers' rising spending power will miss the mark.

### **Consumers and inflation**

At the end of 2010, annual inflation in China was 4.6 percent. By this August, it had reached 6.2 percent—close to its highest level in three years. This development is inevitably affecting real growth in consumption, which fell to 8.5 percent in 2010, from 9.4 percent in 2009. Still, our survey found that consumers are more confident about their financial future than they were last year, and this will probably affect their buying behavior. Fifty-eight percent of respondents said they expected their incomes to rise next year, compared with 39 percent in 2010.

No doubt reflecting this confidence, the survey shows that the number of respondents who choose to spend more-buying in greater quantities, more frequently, or more expensive items in a given category-is holding firm. Whereas last year's survey showed that consumers offset higher spending in some categories by spending less in others. This year, there appears to be much less rebalancing.

Also noteworthy is how consumers, who spent more in 2010 than in 2009, account for their higher spending. On average across categories, some 50 percent of the survey participants identified inflation as the main reason. But of the remainder, 35 percent said



they were trading up (buying more expensive goods in a given category), an increase from 26 percent in last year's survey. Sixty percent said that buying in larger quantities or more frequently was the main reason for their higher spending, compared with 54 percent in last year's survey. But only 5 percent of consumers said they were spending more because they were first-time buyers in certain product categories – down from 20 percent in last year's survey – an indication of the growing maturity of many such categories.

### Consumers and category growth

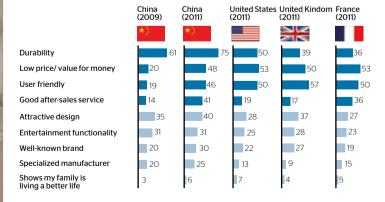
A decade ago, most category growth came from first-time buyers. But this is changing, as so many products are now both available and within the financial reach of large numbers of consumers. Big variations in the importance of first-time buyers have opened up, depending on the category and geographic region. Take large personal-care categories such as skin care and hair care, for example. In personal care, only 3 percent of respondents who said they spent more on the category in the past year were first-time buyers. In less mature niche categories (deodorants, for example), first-time buyers remain more important, as they are for several bigticket items. In personal digital gadgets, for example, 23 percent of respondents said they had bought such goods for the first time.

At the geographic level, the penetration of certain goods may be high in China's more economically developed regions, but plenty of consumer-conversion opportunities remain in less developed ones, which the government has targeted for higher economic growth. Again in personal care, the survey showed that 15 percent of consumers in the Chengdu cluster-the region that encompasses the western city of Chengdu, as well as the less developed surrounding



### Rising expectations but not at a higher price

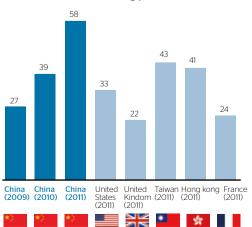
% of respondents who considered this to be an important buying factor



SOURCE: Mckinsey insights China-Annual Chinese Consumer Studies (2009,2011): Online Benchmark Survey (2011)

### **Rising confidence**

% of respondents who said they expected their household income to increase in the coming year



cities of Mianyang and Neijiang - said they had started to use products in these categories only in the past year. Just 1 percent of consumers in the more developed Hangzhou cluster, which includes the cities of Hangzhou, Jinhua, and Linhai, gave that answer.

### **Consumers and brands**

Our survey detects no letup in the influence of brands on Chinese consumers' buying decisions. But neither does it indicate strong signs of increasing loyalty to any single brand.

The survey shows the extent to which consumers value brands more than price or channel, largely because they believe that branded products are safer, of higher quality, and more reliable than nonbranded ones. But faith in brands still does not translate into brand loyalty. In fact, both the number of consumers who always choose from among a relatively small set of brands – whom we refer to as "repertoire loyalists" – and the number of brands in their repertoire continue to rise. The average Chinese consumer now chooses among three to five brands in any given category, compared with two to three brands two years ago. In some categories, such as apparel, where luxury brands have grown hugely popular, the contrast is sharper still.

To succeed in this environment, executives will need to understand where the growth prospects lie, both at the category level and in different geographic regions. Only then will companies be able to prioritize resources and tailor strategies appropriately, to strike a balance between building mass appeal and meeting the needs of specific consumer groups, to focus on perceived value rather than absolute price, to modernize marketing tools for the Internet age, and to embrace rapidly growing online sales channels quickly. Companies must have both the flexibility to adapt and the skills to innovate to keep in step with the Chinese market's exciting development.

### **About the Authors**

Yuval Atsmon and Max Magni are principals in McKinsey's Shanghai and Hong Kong offices, respectively. This article is adapted from the McKinsey report 2011 Annual Chinese Consumer Study—The New Frontiers of Growth (October 2011), available on **www.mckinsey.com**.

### **Notes**

- McKinsey's 2011 survey of Chinese consumers was conducted between February and April of 2011 and is the sixth annual study on Chinese consumers' shopping behavior. The survey interviewed 15,000 consumers in 49 cities, across four city tiers, six geographic regions, and 17 out of 22 city clusters that McKinsey defined. The survey covered consumers' general attitudes, leisureactivity participation, and Internet usage, and dove deep into five categories, including apparel, automobile, consumer electronics, food and beverages, and home and personal care.
- 2 In 2010, the Hangzhou cluster contributed 6.24 percent of urban GDP; the Chengdu cluster, 2.87 percent.



一项麦肯锡的调查显示: 虽然市场变化迅速, 中国消费者今年对未来收入的预期, 比 2010 年更乐观。

国已经步入了消费主义的时代,中国消费者日常使用的产品、服务和品牌已达成千上万种。但是根据《麦肯锡 2011 年中国消费者调查报告》,即除了那些反应最为灵敏的企业,这样的发展速度也许会令大多数企业不知所措。中国消费者在面对通货膨胀时对未来收入的预期比 2010 年更加乐观。在城镇消费者中,初次购买者——曾经是消费增长的主要推动因素——的比例正在下降。另外,尽管中国消费者的品牌意识不断加强,但很少有迹象表明品牌忠诚度也同步增强。事实上,越来越多的消费者习惯于在其钟爱的几个品牌之间进行选择。

对于那些意欲追赶中国下一波消费支出增长浪潮的企业而言,今年的报告具有十分清晰的启示作用。任何单一的方法都无法完全赢得消费者日渐增强的消费能力,而且还会错失市场机遇。

### 消费者与通货膨胀

2010 年底的消费价格指数(即 CPI)为 46%, 2011 年 8 月上升到了 6.2%,接近三年来的最高水平。这无疑减缓了消费的实际增长:实际消费增长率从 2009 年的 9.4% 下降到 2010 年的 8.5%。我们发现消费者对未来收入预期比去年更乐观。这种信心支撑着他们的购买行为。58%的被访者预计他们的收入在下一年会有所增长,这个比例在 2010年仅为 39%。

其次,与这种信心相呼应的是:消费开支增加的消费者与去年持平。消费者抑或购买了更多的商品,或是增加了购买频率,又或是购买了更贵的商品。去年的调研结果发现消费者在某些品类上减少支出,以平衡其他领域支出的增加。今年,这种消费取舍行为减少了许多。



同样值得注意的是消费者如何解释他们开支增加。平均而言,约50%的被访者认为通货膨胀是主因。35%的人坦言消费升级即购买了更贵的商品,这比去年的26%有所上升。相比去年的54%,今年有60%的被访者称,开支额外增加是由于商品的购买数量或次数的上升。今年只有5%的消费者增加开支因为初次购买某种产品,这比去年20%的大幅下降。这表明许多品类在中国市场日趋成熟。

### 消费者与品类消费增长

十年之前,品类消费增长的主要动因是吸引新消费者加入到购买的行列。如今,消费者可在市场上买到的产品种类大幅增加,这些产品的价格也是多数人能负担得起的。初次购买的重要性正在削弱,并因具体品类和地理区域而有较大的差异。以大家比较熟悉的个人护理产品为例,其中包括了护肤品、护发产品等。在过去的一年中,仅有3%的开支增加的被访者中是初次购买者。但是对于价格较贵的大宗产品或者是市场渗透率不高的小众商品(比如香体液),初次购买的重要性依然很高。过去一年内在个人数码产品的开支增加的消费者中23%是初次购买者。

从地理区域层面上看,某些品类的渗透率在经济相对较发达地区已经很高,但在欠发达地区、也往往是中国政府着力发展的地区,却有着十分广大的未来消费群体。再次以个人护理产品为例。我们的调研显示,15%的成都城市群的消费者(生活在包括成都,以及绵阳和内江等欠发达城市)是从去年刚开始使用此品类的。而在杭州城市群一包括杭州、金华和临海,此类消费者的占比仅为1%。●

### 消费者与品牌

本调研发现,品牌对中国人购买决策的影响力从未减弱。但是,消费者对任何单一品牌的忠诚度并无明显上升的趋势。

中国消费者对品牌的重视程度远远超过了价格或渠道。主要原因是消费者认为品牌产品比非品牌产品更安全、质量更高或更为可靠。但是中国人对品牌的热爱并未能转化为其对品牌的忠诚。事实上,越来越多的消费者经常在多个品牌中进行选择,同时他们经常购买的品牌的数目也在增加。两年前中国消费者通常在23个品牌中选择,而现在备选品牌数已上升到35个。在服饰类中,由于奢侈品牌越来越受追捧,竞争尤其激烈。

要想在这样的环境中获得成功,企业必须认识不同产品品类和地理区域的增长异同点可以帮助企业合理地优化资源配置、因地制宜地制定策略;权衡产品对大众消费者和特定消费群体的吸引力;强调产品的高性价比而非仅仅提供绝对的低价;加强互联网营销媒介的应用;建立、强化在线销售渠道,适应电子商务的迅猛发展。只有具备灵活适应能力及创新技能的企业才有可能与中国消费市场的快速发展保持一致步调。

- ① 《麦肯锡 2011 年度中国消费者调查报告》的调查工作在 2011 年 2 月至 4 月间进行,是对中国消费者购物行为的第 6 次年度研究。同往年一样,此项调研对全国 49 个城市的 15000 名消费者进行了访谈,横跨 4 个城市级别、6 个地区和麦肯锡定义的 22 个城市集群中的 17 个。调研涵盖消费者生活态度、休闲活动以及互联网应用,还对服装、汽车、消费电子、食品和饮料以及家居和个人护理用品 5 大品类进行了深入的研究。
- **2** 2010 年,杭州城市群的国内生产总值占全国城镇国内生产总值的624%,成都城市群则占2.87%。



# 想象您龙年成功的新标志

美不胜收的日内瓦揽胜 www.geneva-tourism.ch





### **China Economic Outlook 2012**

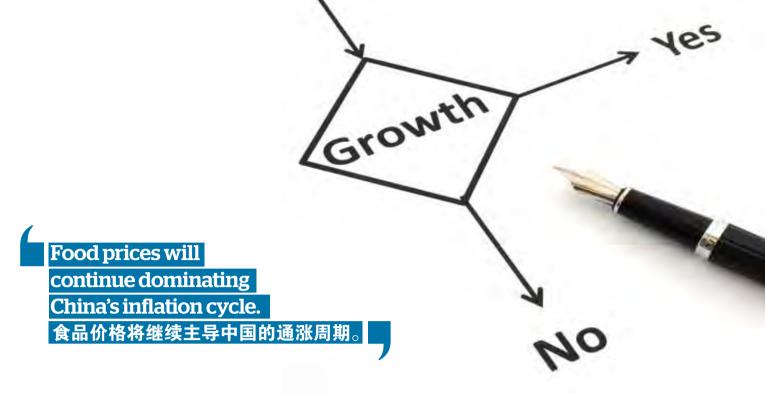
## Weaker Exports -Stronger Domestic Demand

2012年中国经济展望

### 出口走弱——内需增强

Government is expected to increase fiscal spending and ease credit policy to support domestic demand, with a boost to social and infrastructure investment, writes UBS in its China Economic Outlook 2012. Find below an overview and outlook of China's current economic "hot topics", commented by UBS.

Written by **Wang Tao** Head of China Economic Research, UBS 作者 **汪涛**, 瑞银集团中国经济研究主管



**Slower growth:** We expect real GDP growth to slow from 9.2% this year to about 8% in 2012: China's exports are expected not to grow next year as external demand weakens on euro zone recession, and property construction is also projected to slow markedly. On the other hand, the government is expected to increase fiscal spending and ease credit policy to support domestic demand, with a boost to social and infrastructure investment.

Retreating inflation: Food prices are again dominating China's inflation cycle. The rise of CPI inflation in the past year has been largely driven by higher food prices, due to bad weather, natural disasters and another hog cycle, and to a smaller extent, long-term structural issues. With a good grain harvest and maturing hog cycle, food prices have come down and we expect this trend, plus the base effect, will drive the headline inflation at least in the first half of 2012. The liquidity tightening and policy controls have helped to contain non-food inflation, which is also helped by receding commodity prices due to weaker global demand, and moderating labour market pressure. We expect CPI inflation to drop to 3.5% in 2012, bottoming in the summer. The drop in inflation provides another chance for the government to adjust energy and utility prices, which, together with easier liquidity and growth recovery, should lead to a rebound in CPI from Q3 2012.

Social housing comes to the rescue: With the ongoing purchase and credit restrictions, private commodity housing sales and starts have weakened and are expected to fall furthe in 2012. We expect only a modest drop in property prices and see limited impact on the household sector, but new starts could drop by 10-15%. What can stop overall construction activity dropping is social housing construction. Even with officially declining starts in social housing, we expect more real construction to occur in the coming 12-15 months. Ensuring sufficient funding, construction and delivering of social housing should be the top priority for the central government. Increased social housing construction can help prevent a hard landing in property construction and the economy, but not a significant slowdown in either.

Modest fiscal and credit easing: Macro policies have been finetuned in the past month to correct for over-restrictive credit conditions in Q3 2011. As the euro zone debt crisis worsened, China has formally signaled the beginning of monetary easing on November 30 with a 50 bps RRR cut (Reserve Ratio Requirements). As exports, construction and industrial production decelerate more sharply and inflation continues to fall in the next few months, we expect further fiscal and credit easing. Following the previous large credit expansion and stimulus and still dealing with some negative consequences, we think the government will be cautious and will ease policy modestly and gradually. We expect 1% point of GDP in extra fiscal spending between now and end 2012, focusing on social housing and livelihood related areas. We think new bank lending will be rising from now on, possibly approaching 7.5 trillion this year, rising to about 8 trillion in 2012. The central bank may need to cut banks' RRR again to fund the credit increase.

**Continued CNY appreciation:** While China has seen its current account surplus dropping significantly and there has been reported capital outflows in recent months, we expect CNY to continue appreciating modestly against the USD in 2012. China will resist calls for a rapid CNY appreciation for fear of hurting the weakening exports even more, and for fear of the impact on asset price and financial sector. However, China's desire to avoid trade wars and gradually adjust its economic structure will lead to another 3-5% appreciation for the CNY, in our view. We expect USDCNY to trade at 6.25 by year end, and 6.0 by end 2012. After that, we may see a period of little movement on the USDCNY exchange rate.

Policy continuity and stability: Leadership transition is already taking place at the local level, and the central government will complete its transition by early 2013. During this period, we think macro policies will be characterized by stability and continuity, with the central government mindful of the deteriorating external environment on the one hand, and the strong investment drive of local governments on the other. Therefore, we expect the government to ease policy in the face of falling exports and construction, but to remain cautious about reversing property sector measures or allow another major credit expansion.

### Cover Story

### At a glance

### **GDP** Growth

- We project an 8% real GDP growth in 2012, reflecting much weaker exports and slower construction.
- Slower manufacturing and commodity housing investment should be offset by stronger infrastructure and social housing investment.
- The downside risk will mainly come from a possible euro zone crisis-led global recession, and a sharper slowdown in property construction. The upside risk may come from an early solution to the euro zone crisis, and a larger-than-expected policy stimulus.

#### **Macro Policies**

- Fine-tuning of macro policies have turned into formal monetary easing when the PBC announced an RRR cut.
- We expect a modest 2-3% of GDP in economic stimulus next year, supported by a larger fiscal deficit and higher credit quota, biased toward social housing and other "livelihood" type of investment.
- •RRR may be cut again to allow for more lending, but we expect rates will be kept unchanged. We do not expect any change in commodity property policy soon.

### Inflation

- 2012 CPI inflation will drop to 3.5% as food inflation drops and aggregate demand weakens both at domestic and overseas fronts.
- In the longer term, inflation may stay at 4-5% level as structural factors come to play and relative prices are adjusted.

### Property/Construction

- We expect commodity housing sales and construction to drop in 2012 on existing tightening measures from the government.
- We expect social housing construction to be ramped up in 2012, on central government's push and funding supports from various channels.
- As a result, we expect overall property construction and investment to slow significantly, but continue to grow in 2012.

### Investment

- We forecast stronger fixed capital formation growth in 2012 as a result of fiscal and credit easing. The nominal FAI growth may slow to 20%, on subdued upstream prices and land transaction.
- Property investment is expected to slow significantly, and weaker exports should affect manufacturing investment growth. Infrastructure and social investment is expected to rebound.
- Key social and infrastructure investment themes include social housing, water and irrigation projects, environmental projects, schools and clinics, and other urban infrastructure.

### Consumption

- Consumption has been the most stable component in the economy, and has been growing rapidly.
- Decline in food prices and inflation in general, and modest tax cuts should help to support consumption in 2012, though slower economy and employment growth should lead to slower consumption growth.
- The structural shift toward increased reliance on consumption will likely only happen gradually, while the balance is expected to shift toward investment again in 2012.

#### **Exchange Rate**

- CNY has appreciated around 4% against the USD and around 3.9% in trade weighted basis so far this year.
- We expect the CNY to continue appreciating modestly against the USD, trading at 6.0 by end 2012.
- Beyond 2012, we think increasing exchange rate flexibility will replace the recent trend of CNY appreciation against USD as the key focus.

在瑞银 2012 年中国经济展望中这样写道:预计政府将增加财政开支并放松信贷政策以支撑内需增长,这将推动社会民生和基础设施建设投资。本文介绍了中国当前的经济"热点"概况及展望,以下评论由瑞银提供。



**经** 济增速放缓。我们预计 2012 年实际 GDP 增速将从今年的 9.2% 降至 8% 左右。随着欧元区陷入衰退,外需将会走弱,我们预计中国明年出口停止增长,而房地产建设活动也将显著放缓。另一方面,我们预计政府将增加财政开支并放松信贷政策以支撑内需增长,这将推动社会民生和基础设施建设投资。

通胀回落。食品价格再次主导了中国的通胀周期。我们注意到过去一年里,CPI 通胀率主要由食品价格推动,主要受到了恶劣天气、自然灾害频发以及新一轮猪周期的影响,长期的结构性因素也是原因之一(尽管是次要因素)。随着粮食丰收、猪周期进入下行区间,食品价格已经回落。我们预计这一趋势、以及基数效应将至少能够主导 2012 年上半年的通胀走势。流动性收紧和政策限制已经使非食品通胀得到控制,而全球需求走弱带来的大宗商品价格回落、以及劳动力市场压力减轻也帮助抑制了非食品通胀。我们预计,2012 年 CPI 通胀率将回落至 35%,并将于夏季见底。通胀的下降为政府再次提供了调整能源及公用事业价格的机会,再加上流动性放松以及经济增速回升,我们预计 CPI 通胀率将于 2012 年三季度反弹。

保障房将避免经济硬着陆。在持续的限购限贷政策下,商品房销售面积和新开工面积已经走弱,可能将于2012年进一步下跌。我们预计房价仅会小幅下跌,对居民部门的影响也有限,但商品房新开工面积可能会下跌10-15%。而保障房建设将能够避免整体建设活动出现下滑。虽然官方公布的明年保障房开工目标可能会有所减少,但我们仍然认为今后12-15个月里会有更多实质性的建设活动。保建设资金充足、实质性地推进保障房建设并交付使用应当是中央政府的首要任务。尽管无法阻止房地产建设活动和实体经济明显放缓,但保障房建设继续增长应能避免二者出现硬着陆。

适度放松财政及信贷。最近几个月政府对宏观政策进行微调,以扭转 2011 年三季度过紧的信贷条件。随着欧债危机加剧,央行已于 11 月 30 日下调存款准备金率 50 个基点、正式启动货币政策的全面放松。未来几个月,随着出口、建设活动和工业生产出现更大幅度的下滑且通胀持续回落,我们预计财政和信贷政策将进一步放松。由于政府仍在处理上一轮大规模信贷扩张和刺激措施所遗留下来的负面因素,我们认为政府将保持谨慎、适度且逐步地放松宏观政策。我们预计政府将在未来 12 个月里增加占 GDP1% 左右的财政支出,主要投向保障房和民生相关领域。我们预计银行新增贷款将从现在开始攀升,今年可能会达到 75 万亿,2012 年将增至 8 万亿左右。央行可能需要进一步下调存款准备金率以支持信贷增长。

人民币继续升值。虽然近几个月来,中国的经常项目顺差大幅减少并且据报道出现了资本外流,但我们预计 2012 年人民币兑美元将继续温和升值。由于担心升值可能对疲弱的出口带来进一步冲击、并对资产价格和金融业带来影响,因此政府可能仍不愿意让人民币更快、更大幅度地升值。不过,为了避免贸易战并帮助中国逐步调整经济结构,我们认为人民币明年将再升值 3-5%。我们预计人民币兑美元汇率将于今年末升至 6.25,并于 2012 年末升至 6.0;此后,人民币兑美元汇率可能将保持平稳。

**政策保持连续性和稳定性**。地方政府已经开始换届,中央政府也将在2013 年初之前完成换届。在此期间,我们认为政府将保持宏观政策的连续性和稳定性。中央政府既会关注外部环境的恶化、也会提防地方政府高涨的投资热情。因此,我们预计当出口和建设活动出现下跌时,中央政府将会放松宏观政策,但对于放松房地产调控政策或再来一轮大规模的信贷扩张仍将保持谨慎。

### 经济概览

#### GDP 增速

- 我们预计 2012 年实际 GDP 将增长 8%,这一预测反映了出口大幅走弱和建设活动放缓。
- •基础设施与保障房投资的增加应抵消制造业和商品房投资的放缓。
- 下行风险或主要来自欧元区危机可能引发的全球性衰退、以及房地产建设活动更大幅的放缓。上行风险可能来自欧元区危机早于预期达成解决方案、以及政策刺激力度超预期。

#### 宏观政策

- 在央行下调存款准备金率之后, 宏观政策微调已经转向全面的货币政 策的放松。
- 我们预计 2012 年将实施一个规模约占 GDP2-3% 的温和刺激政策,主要通过财政赤字和提高信贷额度来实现,政策重点将是保障房和其他 "民生"类投资。
- 存款准备金率有可能进一步下调,以支持贷款增长,但利率将保持不变。我们预计商品房紧缩政策不会很快转向。

#### 诵货膨胀

- 我们预计 2012 年 CPI 通胀将跌至 3.5%, 主要由于食品通胀回落以及 国内与海外总需求全面下降。
- •长期来看,受结构性因素及相对价格调整影响,通胀率可能维持在 4-5%之间。

#### 房地产和建设活动

- 我们预计受当前房地产调控政策的影响,2012 年商品房销售和建设活动都将下跌。
- 我们预计在中央政府的推动以及多渠道筹集资金的支持下, 2012 年保障房建设步伐将会加快。
- 因此,我们预计 2012 年整体房地产建设活动和投资虽然会显著放缓, 但仍能维持正增长。

### 投资

- •由于财政和信贷政策放松,我们预计2012年固定资本形成增速将略有加快。随着上游价格和土地交易下滑,名义固定资产投资增速将会放缓至20%。
- 我们预计房地产投资将显著放缓,出口走弱可能会影响制造业投资。
   基础设施和社会民生投资将会反弹。
- 社会和基础设施投资的主题包括:保障房、水利系统和灌溉项目、环保项目、学校和医院以及其他城市基建项目。

#### 消费

- 消费一直是经济中最稳定的一个组成部分, 并且一直保持着快速增长。
- 食品和通胀下降以及小规模减税应有助于支撑 2012 年的消费,虽然 随着经济和就业增长放缓,消费增长很可能也会放缓。
- 经济重心向消费转移的结构性变化应该会是一个渐进的过程,我们预计 2012 年经济重心将再度偏向于投资。

#### 汇率

- 自今年年初以来,人民币兑美元已升值了 4% 左右,按贸易加权的名义有效汇率升值了约为 3.9%。
- 我们预计人民币兑美元汇率将继续温和升值,到 2012 年底人民币兑美元汇率将达到 6.0。
- •我们认为 2012 年以后,汇率的灵活性将会上升,这将会取代人民币 兑美元不断升值的趋势。





Silvio Napoli: Eight.

### B And for the next 5 years?

Silvio Napoli: 8.5

### ☑ This is slightly above the average confidence of the Swiss business leaders in China. And what are your top five business concerns in China?

**Silvio Napoli:** Managing growth with all it entails, securing and retaining talent, having the right products for the Chinese market, then, linked to number three, is cost competitiveness, and managing constant change. In exactly this order.

### Are there fundamental differences across the markets of Asia Pacific?

**Silvio Napoli:** Yes, there are. And frankly, this is what makes the excitement to me of operating in this region. There are three categories. Firstly, the mature, well established markets. Or from a financial point of view on could say places generating regular sustained cash flows. In this category one has developed economies with moderate yet steady GDP growth like Japan, Australia or New Zealand. Overall, they are very similar to the West in terms of business structure. The second category consists of countries formerly known as the "Asian tigers". Here we have much faster GDP growth, markets evolve rapidly because of cutting edge technology requirements and very high customer demands. There are huge opportunities for us. Lastly, there are the "super growth" countries with China above all. But, on a much smaller scale, one could also include Vietnam and Indonesia. Depending on where one operates, a different set of skills is required.

#### B Which one is the most important market for Schindler?

**Silvio Napoli:** China, by far. To give you an idea: China alone is more than 50% of the world market.

### $\blacksquare$ This is reflected also in the fact that every second newly built sky scraper in the world is located in China.

**Silvio Napoli:** Correct. And that's even a conservative estimate. High rise are what we call buildings above 200 meters. Even two out

of three newly built skyscrapers are in China. And every second lift sold in the world is sold in China. This particularity does not apply on that many industries. Except presumably other construction related businesses, too. And pianos, interestingly, as I learned recently.

#### B What is your operational set up in China?

**Silvio Napoli:** Shanghai is the headquarters of Schindler China, but also for the Asia Pacific region, including the necessary central functions. Our Asia Pacific R&D operations are just here down the alley. And we just transferred our world wide purchasing (corporate procurement for components, raw materials, electronic parts etc.) to China in October 2011. China is the factory of the world so you have all types of component producers. Hence, purchasing managers need to be focused on China.

### B How about the manufacturing procedures?

**Silvio Napoli:** We have here in Shanghai, just next door, our escalator factory. It supplies the whole world. You should come here in the morning. Trucks are lining up the road to deliver to the whole world. The other big production site is in Suzhou, where we manufacture elevators. As well, it supplies China and the global markets.

Then we have "lead branch offices" like Beijing with fully fledged engineering and maintenance operations. Our network is completed by a number of smaller branches which cover all big cities in China. We have doubled our branches since the last year and we plan to continue with this growth pattern for the foreseeable future.

# E Let's take a look at some macro trends. The population is increasing, cities are getting more densely populated and grow vertically and the need for mobility in urban environment goes up. It all goes pretty much in your favour.

**Silvio Napoli:** Indeed, we can't complain. Urbanization is accelerating. Today, 60% of the world population lives in cities, whereas 50 years ago, this figure was at 20%. It is a fact, that urban development planning more and more supports vertical planning. This, not only opens up for more elevators and escalators, but also for innovation.

What is the single most critical parameter Schindler's success is depending on?

**Silvio Napoli:** Urbanisation is the crucial factor. The vacancy rates are also of much importance to us. Cities with a surplus of offices – a high vacancy rate – see little construction coming in.

### ☑ Horizontal vs. vertival - Escalator vs. elevator. What is more important?

**Silvio Napoli:** In China, the ratio is more than 1:10, meaning one escalator for 10 elevators. In addition to urbanisation, the escalator business is driven by public transportation infrastructure. Chinese consumers, as a whole, are important too, as shopping malls lead to escalators.

#### B How did this ratio evolve?

**Silvio Napoli:** The big governmental push into affordable housing has pushed the elevator ratio enormously. There is the famous plan to build 10 million dwellings a year over a period of five years.

### Does Schindler as a premium player really benefit from social housing projects?

**Silvio Napoli:** Today, to a very limited extend. I mentioned to you earlier, having the right products for China is one of my key concerns. We were always strong in high rise and escalators. But we didn't have the right products to compete in a lower price segment. That's why we started launching less costly products specifically for the Chinese market in 2008. We are pushing this segment heavily. We are in the process of launching a lift to specifically meet the requirements for the residential mass volume market in China.

### B How big is this market?

**Silvio Napoli:** To give you an idea: Affordable housing projects account for a third of China's elevator market. And demand is coming increasingly from ambitious third tier cities with a lower purchasing power. It's a segment that can't be ignored.

### ☑ Interesting. Top notch player Schindler runs a downgrading strategy in China, launching a cheaper product line.

**Silvio Napoli:** Allow me to say "less costly" instead, because it is still excellent quality for money. Similar maybe to a non-pricy Swiss



watch. Also, we don't call it a "downgrading strategy", but "made in China - made for China". In the past, companies developed in Europe, for Europe, and then eventually sold to China. These times are over. Now, it's reverse. We develop in China and then adapt to other markets.

#### Are the more affordable lifts also easier to install and maintain?

**Silvio Napoli:** They have to. Otherwise they would not meet the market requirements. Shafts in China are a lot dirtier, dustier and more humid than any shaft in Europe. Hence, we develop products taking different construction standards into consideration.



#### B What else is specific to China?

**Silvio Napoli:** Two factors clearly stand out. The incredibly stiff cost competitiveness and the pace of market changes. There is no other market like China where you have to come with new models every year, but at lower costs. So on top of being cost competitive, you are being required to be more sophisticated. One of the latest trends demanding our attention is energy efficiency.

### ② You established the operations of Schindler in India. How is China compared to India in this respect?

**Silvio Napoli:** China is clearly one of the most demanding business environments in the world. I can't speak for them all. India is a challenging and incredibly interesting market, too, but what makes China unique is it's size and unprecedented speed.

#### Any local competitors?

**Silvio Napoli:** Yes. They are getting more and more numerous. They start in the low price segment and move up progressively. Some of them are within the top 10 players.

#### B So no serious threat for Schindler?

**Silvio Napoli:** We take the challenge very seriously. One should never underestimate eager competitors. We know from other business cases like Japanese motorcycles or cars how quickly they eventually can take over the whole market.

# One billion people are transported by Schindler products every day. And every second lift sold in the world is sold in China.

每年有 10 亿人、每天有 4000 万人乘坐迅达公司生产的电梯。 迅达每卖出两部电梯,其中就有一部是卖给中国的。



### ☑ A way to make a difference is providing innovative solutions. Can you give me some examples of "smart elevators"?

**Silvio Napoli:** It is no longer just a question of transporting people up and down. It's about how to transport and how to maximise the number of people in the shortest possible time. For instance, we were the first ones introducing a system to reduce energy consumption for passenger recognition at a distance. This provides unique building security and improves traffic patterns. Back in the nineties, Schindler was the first one launching intelligent elevators and a system called "destination control", whereby you do not call the floor when you enter the lift, but you are assigned a specific unit in a lift bank depending on your destination floor. Traffic is optimized and people are dispatched accordingly in order to reduce the overall travelling time.

#### ☑ So I spend less time in front of a closed elevator door?

**Silvio Napoli:** To be technically correct, you will get to your floor faster, yes. And use up less energy. This technology can be combined with double deck elevators to further increase capacities. Such improvements allow bigger population buildings to operate with fewer elevator shafts, hence leaving more space to rent out for the builder. Without a smart transportation control, let's say a 100 story building like ICC in Hong Kong, frequented by as much as 20'000 people every day, simply could not function. We improve the return of investment of our clients.

### B Where is all that innovation being developed?

**Silvio Napoli:** Traditionally, all our R&D was based in Switzerland. Progressively, this is being shifted across the world and to China in particular.

### ■ What kind of R&D does Schindler do in China?

**Silvio Napoli:** We focus on products for China, which evolve into global platforms exported across the world.

### ■ What is the next generation of lifts going to be like?

**Silvio Napoli:** This is what we call "transit management". Not only will the elevator be called automatically, but also the lights in your office and your computer will be switched on automatically. With this kind of access control we can also provide additional security features. Lifts will be an integral part of building security in the future. Schindler is clearly moving into this direction.

#### B What is the reason, if Schindler looses a tender to a competitor?

**Silvio Napoli:** If you ask our sales people, they will say price (smiling). Sophistication comes at a cost.

### ☑ As a passenger of a Schindler elevator, can I be sure maintenance has also been done by Schindler?

**Silvio Napoli:** No, you can't. Unfortunately, this is not in our hands. Our strategy is, however, to only sell when we see a high probability

of getting the maintenance contract as well. But as a matter of fact, the builder is not always the same person as the landlord. And some landlords do not appreciate the importance of having the original equipment manufacturer maintaining its own products.

### ☑ Can't it be part of initial negotiations that you only sell to a building owner in combination with an exclusive 10 year maintenance contract?

**Silvio Napoli:** In China, the market would not accept that. In some markets, however, it is almost a done deal when you sell a lift, because landlords usually want maintenance to be done by the manufacturer.

### As a passenger, this is all a little scary. However, surprisingly few accidents happen.

**Silvio Napoli:** True. Lifts are by far the safest transportation mean in the world. That's the good news.

### ☑ Looking at the revenue, an elevator generates over an average lifespan of 20 years. How much is maintenance revenue?

**Silvio Napoli:** In Asia, the relation is 50:50%. Maintenance revenue accounts for about 5% per year of the initial investment. In Europe, lifts tend to be older, we are talking about a lifespan of maybe 50 years, so maintenance revenue becomes even more important.

### B How many people use Schindler products every day?

Silvio Napoli: About one billion every day.

### B What are the figures in China?

**Silvio Napoli:** Honestly, I never did the math. But you are giving me an interesting assignment (laughing).

### ☐ Can you think of any other way of moving people up and down than elevators and escalators?

**Silvio Napoli:** In terms of hardware, no one has found anything as competitive as a lift yet. One day, there might be vehicles (passenger cabins) that can go horizontally and vertically and facilitate or enable mobility within one or between two high rise buildings. The big changes will happen on the software side.



### Silvio Napoli (1965)

Silvio Napoli has been a member of the Management Committee at Schindler with responsibility for the Asia/Pacific region since March, 2008. For three years prior to that date, the Italian by birth (Rome) was head of the Jardine Schindler Group. From 2003 to 2005

he was General Manager of Schindler Lifts (Hong Kong) Ltd. From 2001 to 2003 he was Director of Corporate Development (M&A) for ALSO Holding AG. Napoli, who is a sharp analyst and straight forward talker, joined the Schindler Group in 1994 and has held various positions, including Vice President South Asia, President and CEO Schindler India, and Head of Corporate Planning. For three years prior to joining Schindler, Silvio Napoli held different positions with The Dow Chemical Company in Germany. He holds an MBA from Harvard Graduate School of Business Administration and a degree in materials science from the Swiss Federal Institute of Technology (EPFL) in Lausanne. Napoli grew up in an international environment as his parents were diplomats. He is married, has three children and lives in Shanghai since four years.

### Schindler - A China Pioneer **Milestones**







迅达亚太区负责人 Silvio Napoli 谈论城市化、竖向城市规划、"智能电梯" 以及下一代电梯。本文介绍了瑞士公司迅达将如何通过征服低端市场实现在中国的地域扩张。

图中国瑞士商会最近开展了年度"商业信心指数"调查,如果用 0 - 10 表示的话,你对 2012 年的信心水平是多少?

Silvio Napoli: 80

### B 对未来五年呢?

Silvio Napoli: 8.5

### ③ 这比瑞士商业领袖在中国的平均信心水平略高。你对在中国经商的五大忧虑是什么?

Silvio Napoli:基本上是这个顺序:实现增长、找到并留住人才、开发适合中国市场的产品、成本优势以及应对不断发生的变化。

### **②亚太地区的各个市场间有着根本的不同之 处吗**?

Silvio Napoli: 是的。坦率的说,这是我非常喜欢在这一地区工作的原因所在。亚太市场可以分为三种:第一种是成熟的市场,或者从金融的角度说是产生不断的资金流的市场。这一市场包括 GDP 增长稳定的经济发达国家,如日本、澳大利亚和新西兰等。总的来说,这些国家在商业结构上与西方很相似。第二种是以前曾被成为"亚洲四小龙"的国家。他们的 GDP 增长更迅速,市场在领先技术要求和消费者需求高企的推动下迅速发

展。这些市场带给了我们巨大的机遇。最后一种是以中国为首的"超级增长"国家,当然,从更广阔的意义上来说,也可以把越南和印度尼西亚包括在内。企业在不同的市场运营,将需要不同的发展战略。

### **②以上三种市场中,哪一种是迅达最重要的市场呢?**

Silvio Napoli: 目前来看是中国。举个例子来说,中国一个国家就占据了我们在全球50%的市场份额。

### ② 这也反映在每三座新建的摩天大楼里有一座是在中国这个事实。

**Silvio Napoli**: 是的。这种估计其实是比较保守的。我们所说的摩天大楼是高度超过200米的建筑物,其实三分之二的新建摩天大楼都在中国。而企业每卖出两部电梯,其中有一部就是卖给了中国。

### **B 你们在中国的运营机构有哪些**?

Silvio Napoli: 上海是迅达中国的总部所在,同时也是亚太地区的总部,它发挥着必要的集中功能。我们在亚太地区的研发机构就在附近。2011年10月,我们还把全球采购中心(公司部件采购、原材料采购、电子配件采购

等)转移到了中国。中国是世界的工厂,这 里有各种零部件生产商。因此,采购经理应 该把注意力集中在中国。

### 日生产呢?

Silvio Napoli: 我们的自动扶梯工厂也在上海,就在隔壁。这个工厂为全球供货,你如果早上来的话,就能看到成队的卡车把我们的产品运往世界各地。另外我们在苏州也有一家工厂,主要生产升降梯,同样也向中国和全球市场供货。我们在北京等地区还设有功能齐全的工程和维护"办公室"。我们在中国的网络通过许多小的分支机构将所有的大型城市覆盖在内。2011年我们的分支数目同比翻了一番,未来我们将保持这种扩张模式。

# 回从宏观趋势来看,人口不断增长,城市人口越来越密集,城市发展趋于纵向规划,城市环境向上发展的要求更加迫切。这些对于你们来说都是十分有利的。

**Silvio Napoli**: 你说的不错。城市化正在加速。目前 60% 的人口居住在城市,而在 50 年前,只有 20% 的人口居住在城市。事实上,城市发展规划也越来越倾向于竖向规划。这不仅带来了更多的升降梯和自动扶梯需求,还打开了对创新的要求。

#### **B** 迅达成功所依赖的最重要的要素是什么?

Silvio Napoli: 城市化是十分关键的因素。 空置率也很重要。拥有许多闲置办公室的城市(即高空置率)将不需要新的建筑项目。

### ③ 水平相对于纵向——自动扶梯相对于升降梯、哪个更重要呢?

Silvio Napoli: 在中国,自动扶梯与升降梯的比例是1:10。除城市化外,自动扶梯业务主要由公共交通设施需求推动。中国消费者群体很重要的,因为购物商场需要自动扶梯。

### **B** 这一比例是怎么发展变化而来的?

Silvio Napoli: 政府对于保障性住房建设的推动大幅度提高了升降梯的比例。中国计划在五年内每年建成1000万套保障性住房。

### ②作为一个高端竞争者,迅达能从保障性住房项目中获益吗?

Silvio Napoli: 目前来看,获益不大。正如我在前面提到的,我的担忧之一就是开发适合于中国市场的正确产品。高层升降梯和自动扶梯一直都是我们的强项,但在低价格领域我们没有什么产品可以与其他企业竞争的。这也是我们在 2008 年开始针对中国市场推出成本较低的产品的原因。目前,我们正着力推动这一领域的发展。我们目前正在推出专门针对中国居民住宅市场要求的电梯。

### **B** 这一市场有多大?

Silvio Napoli: 基本上,保障性住房项目的需求会占到中国升降梯市场需求的三分之一。而来自于购买力较低的三线城市的需求在不断增长,这一市场绝对不容忽视。



### ③ 这些价格较便宜的电梯安装和维护起来是不是也更容易呢?

Silvio Napoli: 是的。不然的话它们就无法满足市场的要求。中国的通风井比欧洲的通风井更脏、灰尘更多,而且也更潮湿。因此,

### ② 迅达在印度也建立了运营机构。你们如何 比较中国和印度?

Silvio Napoli: 中国市场很显然是世界上最严苛的商业市场之一。印度也是一个充满挑战的市场,但中国的特殊之处是其市场规模和前所未有的发展速度。

# Schindler is not a "me too" company and we distinguish ourselves through innovation.

迅达不是一家与其他公司同化的企业,而是一家通 过创新实现标新立异的企业。**■** 

### 回高端竞争者迅达将在中国采取低端战略, 并推出较便宜的产品线,这一点十分有趣。

Silvio Napoli: 不是较便宜,而是"较低成本",因为这些产品的质量仍然是很好的,可以比作是价格不太昂贵的瑞士手表。另外,这并不是"低端战略",而是"在中国制造——为中国制造"。过去是在欧洲发展起来的企业和针对欧洲市场的产品最后来到中国。现在不同了,一切都会反过来,我们为中国市场开发产品,然后再应用到其他市场。

我们在开发产品的时候必须把不同的建筑标 准考虑在内。

### **B** 中国还有哪些特殊之处呢?

Silvio Napoli: 有两大因素:成本优势刚性和行业规范变化迅速。很少有其他市场像中国一样要求企业每年以更低的成本对产品进行更新换代。因此,为了实现成本优势,企业必须十分娴熟。最近的趋势要求是节能。

### **B**你们有来自本地的竞争对手吗?

Silvio Napoli: 当然。本地的竞争者越来越多。他们从低价格领域开始进入,慢慢向高端市场发展,有些已经跻身于中国升降梯市场前十名。

### **B他们尚不能对迅达构成威胁吧**?

Silvio Napoli: 对于来自本地企业的竞争我们十分重视,我们不能低估热切的竞争对手的实力。从日本企业的机动车和汽车等行业我们都目睹了本地企业是如何迅速的抢占了整个市场的。

### B 脱颖而出的方法之一是提供创新性的解决 方案。你能给我们举一些"智能电梯"的例 子吗?

Silvio Napoli: 电梯不再仅仅是将人载上载下这么简单,而是如何在最短的时间内运载最多的客人。举个例子来说,我们是第一家引进通过识别附近乘客的技术来减少能耗的企业,这种技术保证了楼宇的安全并改善了





# 9

### Silvio Napoli (1965)

2008年3月,Silvio Napoli开始成为迅达管理委员会的成员,主要负责迅达在亚太地区的业务。在此之前的三年里,他一直担任着怡和迅达(Jardine Schindler Group)的总裁一职。2003年至2005年间,他曾出任迅达升降机(香港)有限公司总经理,在此之前的2001年至2003年期间,他曾担任ALSO Holding AG公司企业发展(并购)总监一职。Napoli为人耿直,对市场变化的反应十分敏锐,他于1994年加入迅达集团,并担任过不同的

职务,包括南亚地区副总裁、迅达印度总裁兼CEO和企业规划总监等。在加入迅达之前的三年里,他曾在陶氏化学德国就职。他曾就读于哈佛大学企管学院,并获得MBA学位,另外,他还获得了由瑞士联邦理工学院(EPFL)洛桑分校颁发的材料科学学位。Napoli的父母都曾是外交官,因此他在一个十分国际化的环境中成长。他已婚,有三个孩子,已在上海居住了四年。

交通模式。早在 20 世纪 90 年代,迅达就已 经率先推出了智能电梯和"目的层控制"系统,你不必等到进入升降梯才按下目的层,而是根据你所要到达的目的层由控制系统为你分配适当的电梯。通过这种方式,在使用电梯高峰期,人们可以乘坐系统分配的电梯,从而减少时间浪费。

### **B**也就是说我节省了等待时间?

Silvio Napoli: 技术上来说,你可以在更短的时间内、通过消耗更少的能量到达你想去的楼层。为了进一步增加容量,这种技术可以与双层电梯相结合。这一技术可以使拥有较多乘客的建筑物在较少的通风井下仍能正常运行,从而给住户留下更多的可使用空间。如果没有智能控制系统,像香港环球贸易广场这样的100层高楼是无法每天运载2万人上下自如的。我们帮助客户提高投资收益。

#### **③这一创新是在哪里研发的**?

**Silvio Napoli**: 传统的研发都在瑞士进行。 不过我们正逐渐将更多的研发工作转移到世 界其他地区,尤其是中国。

### B 迅达在中国主要有哪些类型的研发活动?

**Silvio Napoli**: 我们集中精力在针对中国市场的产品研发上,这些产品会逐渐演变并出口向世界各地。

### B 下一代电梯将是什么样的?

Silvio Napoli:就是我们所说的"运输管理"。乘客不但可以自动呼叫升降梯,还可以自动打开办公室的灯和电脑。通过这种控制方式,我们还可以提供额外的安全服务。未来,电梯将成为建筑物安全的一个组成部分。迅达就是朝着这个方向发展的。

### 回如果迅达在投标中失败,一般来说是什么原因呢?

**Silvio Napoli**:如果你问我们的销售人员,他们会说是价格(笑)。熟练需要付出代价。

### ③ 作为迅达升降梯的乘客,我可以确定电梯的维护也是由迅达公司提供的吗?

Silvio Napoli: 不能。很不幸的是,维护不是由我们来进行的。不过,我们的战略是尽可能在同时获得维护合同的情况下将产品卖给客户。事实上,建筑商并不一定就是大楼的主人。许多大楼不太希望电梯生产商来进行电梯的维护,往往选择与本地企业合作。

### 回你们不能在合同初期就提出提供 10 年维 护合同的要求吗?

**Silvio Napoli**: 在中国,市场是不接受这种做法的。在某些市场,这是约定俗成的,因为楼主希望维护由生产商来做。

### 目作为乘客,这多少有一点吓人。不过幸好没有什么事故发生。

**Silvio Napoli**: 是的。好消息是,电梯是目前世界上最安全的交通工具。

### 回从收入方面来看,一部电梯在平均 20 年的生命周期内不断带来收入。维护所能带来的收入是多少?

**Silvio Napoli**: 在亚洲,维护收入每年可以占到初期投入的 5%。在欧洲,电梯一般都比较旧,可能拥有约 50 年的生命期,因此维护方面的收入就占到相对重要的一部分。

### **日每天有多少人使用迅达产品**?

Silvio Napoli:每年约有10亿人使用。

### **B** 在中国呢?

**Silvio Napoli:** 我不知道。不过这些数据值得统计 ( 笑 )。

### 回除了升降梯和自动扶梯外,还有其他运载乘客上下楼的设备吗?

Silvio Napoli: 在硬件上,还没有可以与电梯相比的设备。有一天,也许会有可以横向移动、纵向移动并加快或实现在两座大楼间移动的交通工具。重大的改变将主要发生在软件方面。

# Increasing Cost of People in China

中国劳动力成本上升瑞士将为其国民争取社会保险豁免



Switzerland to take up issue of exemption of social insurance for its nationals

Written by **Nicolas Musy**, SwissCham Shanghai Board Member 作者 **Nicolas Musy**, 中国瑞士商会上海分会董事会成员

Since the issuance of the new social insurance tax that includes foreigners, which is valid from 1st July 2011 and its interim measures taking effect on 15th October 2011, Beijing has started collecting foreigners social insurance dues with retroactive effect on October 15th. While Shanghai did not start collecting the foreigners social insurance, companies should expect to pay an additional cost of over RMB 4'300 - per month per foreign employee, possibly accrued from 15th October 2011, while the foreign employee will have to pay almost RMB 1'300 -/month. This is assuming that foreign employees receive at least RMB 1'688 per month, level at which social insurance is capped. See table below for details:

Social Fund	Employee Rates	Employee Contribution (RMB)	Employer Rates	Employer Contribution (RMB)
Pension	8%	935	22%	2'571
Medical	2%	234	12%	1'403
Unemployment	1%	117	1.7%	199
Maternity	-	-	0.8%	94
Work Injury	-	-	0.5%	58
Total	11%	1'286	37%	4'325

Contributions capped at 300% of the average monthly wages in Shanghai, which is RMB 1'688 currently (RMB 3'896  $\times$  3)

## Rising labor costs for companies and higher disposable income for the lower middle class Chinese.

Additionally, Dalian has scrapped the cap on social insurance (set at three times the previous year's average salary) on an experimental basis. This action can only lead to two outcomes: Dalian re-instates the cap in order to remain competitive or the rest of the country follows. Needless to say, the latter possibility would potentially considerably raise the cost of Chinese and foreign talent in China. Other social measures are under discussion (such as an improvement of maternity leave and conditions) so that we may expect the current trend in increased social costs to continue, despite the fact that China is one of the countries collecting the highest amount of taxes (Second after France according to a Forbes 2009 report).

The personal income tax has also been revised as of the 1st July 2011. By raising the deduction from RMB 2'000 - to RMB 3'500 - it exempts from income tax all private persons with a net monthly income (after deduction of social contribution) of RMB 3'500 - or less. This is estimated to reduce from 84 Mio to 24 Mio the number of individual tax payers in China. At the same time, higher incomes are taxed more. By reducing the number of brackets from 9 to 7, the highest bracket (45% of taxable income) is brought down from RMB 100'000 - to 80'000 -/month. In so doing, the monthly income at which the highest tax rate is applied.

Taxable Monthly Income (RMB)  After deduction of social charges borne by employee & RMB 3'500	Tax Rate (%)	Employer Contribution (RMB)
less than or equal to 1'500	3	0
above 1'500 but less than 4'500	10	105
above 4'500 but less than 9'000	20	555
above 9'000 but less than 35'000	25	1,005
above 35'000 but less than 55'000	30	2,755
above 55'000 but less than 80'000	35	5,505
more than 80'000	45	13,505

The new policies, by raising costs of companies for high-income staff will put additional pressure on raising productivity, particularly on highly-paid staff. On the other hand, the increased tax collection on higher incomes is certainly aimed at reducing the gap in disposable incomes of the different wealth levels in the population, as well as increasing consumption by giving the lower income classes (most likely to spend more) more opportunities to consume. The other expected improvements of the social safety net go in the same direction by reducing the need to save.

#### "Battle for Talent" certain to continue

As a result of these rising labor costs, particularly on higher income employees, the "Battle for Talent" is certain to continue raging in the years to come, as companies need better and better trained professionals to improve productivity and remain competitive in the local and international markets.

To alleviate this situation, particularly in terms of foreign employees, SwissCham has communicated the situation to the Swiss representation in China suggesting the Swiss government to consider entering into a treaty for the exemption of Swiss nationals from social insurance in China. China has currently signed such treaties with Germany and Korea only. Confirmation has been given to SwissCham that the issue will be taken up by with the Chinese authorities.

Should negotiations start and be concluded positively, what can Swiss employers in China expect? If the German treaty is a guideline, essentially the pension insurance (representing 30% out of the total 48% that will be levied on foreign employees) could be waived provided that the foreign staff is registered with the home country welfare system. Germans paying at home are also exempt of unemployment insurance, whereas Koreans are only exempt of pension insurance.

公布在中国境内工作的外国人参加社会保险的暂行办法(自 2011 年 7 月 1 日开始生效)以来,北京已经开始要求在中国境内工作的外国人缴纳社保,并追溯至 2011 年 10 月 15 日。虽然上海尚未要求外国人缴纳社保,但是一旦开始缴纳,企业每月将增加为每名外籍员工缴纳 4,300 元社保的额外支出,并可能会被要求追溯至 2011 年 10 月 15 日。而外籍员工每月也将多支出 1,300 元的社保费用。以上数据的计算假定外籍员工每月的收入在 11,688 元的社保缴纳基数上限以上。具体计算方式见下表:

险种	个人缴纳比例	个人缴纳金额 (元)	单位缴纳比 例	单位缴纳金额 (元)
养老保险	8%	935	22%	2'571
医疗保险	2%	234	12%	1'403
失业保险	1%	117	1.7%	199
生育保险	-	-	0.8%	94
工伤保险	-	-	0.5%	58
总计	11%	1'286	37%	4'325

上海目前的社保缴纳基数上限为11,688元(3,896元x3),是上一年上海市日平均工资的三位



另外,大连已经取消了社保缴纳基数上限(上一年平均工资的三倍)。这种做法将会导致两种结果:在竞争压力下大连重新恢复使用社保缴纳基数上限,或者全国其他城市也都将采取大连的做法。毋庸置疑,后一种结果将会大大的提高中国劳动力成本和在中国境内工作的外国人的成本。尽管中国目前已经是赋税最高的国家之一(根据福布斯 2009 年的报告,中国的税赋仅次于法国),由于其他社保措施仍在讨论之中(如加长产假和增加生育保障等),我们认为目前中国增加企业社会保险支出的趋势将会继续下去。

自 2011 年 7 月 1 日起,中国政府也对个人所得税进行了相关调整。新规定将税收起征点从 2,000 元提高到 3,500 元,对所有月净收入(扣除社保后)低于 3,500 元的个人免征所得税。据估计,这一规定将中国的纳税人数从以前的 8,400 万人减少到了目前的 2,400 万人。与此同时,高收入者的税赋进一步增加。规定将税率等级从以前的九个减少到现在的七个,最高的税收等级(税率为 45%)从 100,000 元降到了 80,000 元,将更多的人包括在了适用最高税率的范围内。

全月应缴税所得额(元) 抵扣社保及 <b>3,500</b> 元	税率(%)	速算扣除数(元)
不超过 <b>1500</b> 元的	3	0
超过1500元至4500元的部分	10	105
超过4500元至9000元的部分	20	555
超过9000元至35000元的部分	25	1'005
超过35000元至55000元的部分	30	2'755
超过55000元至80000元的部分	35	5'505
超过80000元的部分	45	13'505

这些增加高收入员工成本的新政策将增加对员工尤其是高薪员工的生产力压力。另一方面,增加对高收入人群的税收无疑是为了缩小不同收入水平人群间的可支配收入差异,通过为低收入阶层(最有可能增加消费的人群)提供更多的消费机会来增加国内消费。通过改善社保网络,也可以降低人们对储蓄的需求,从而达到增加消费的效果。

### "人才之战"仍将继续

劳动力尤其是高薪劳动力成本提高的结果就是,"人才之战"将会继续,因为企业为了提高生产力和保持在本土和海外市场的竞争力,将必须找到更好的、训练有素的专业人才。

为了缓解外籍员工劳动力成本上升的压力,中国瑞士商会已就此问题与瑞士在中国的代表进行了沟通,并建议瑞士政府考虑与中国达成瑞士人豁免于中国社保规定的协定。目前,与中国达成该协定的国家只有德国和韩国。瑞士相关当局已向中国瑞士商会表示将与中国当局就此问题进行协商。

如果谈判顺利,那么在华的瑞士企业将看到什么结果呢?以德国协定作为指导,如果外籍员工在其本国已参加了社会保障体系,那么养老保险(占外籍员工需缴纳 48% 中的 30%)将可以免掉。在德国缴纳失业保险的德国人也可以免于在中国缴纳失业保险,而韩国仅获得了养老保险的豁免权。



作为世界五大独立能源贸易公司之一,摩科瑞能源集团有限公司 是一家广泛活跃于全球能源市场的国际集团公司,总部位于瑞士 日内瓦,主要从事原油及成品油、石油化工品、天然气、电力、 煤炭、生物柴油、植物油和二氧化碳减排指标等能源产品的实货 和衍生产品的交易。

在核心的能源贸易之外,集团还投资能源上游和下游的资产项目,包括阿根廷、加拿大、美国的油田项目,及欧洲和中国的石油仓储、码头项目,同时集团还在南非、印度尼西亚、哥伦比亚、俄罗斯大规模投资煤矿资产,并在德国和荷兰拥有生物能源的生产基地。

摩科瑞在国际能源市场上充分显示其充满活力、多元化及发展迅速的特色。集团在严格实施风险管控的前提下,根据客户的能源需求,通过灵活多变的定价公式和物流体系,为其设计个性化的解决方案。

目前,我们在中国设立了两家分公司——摩科瑞能源贸易(北京)有限公司和摩科瑞投资咨询(北京)有限公司,我们正在与中国的业务伙伴紧密合作,向中国供应能源产品,并共同投资包括仓储、码头在内的能源基础设施,从而为促进这一伟大国家的繁荣发展贡献力量。

Mercuria is a privately-owned international group of companies, with the headquarter in Geneva, Switzerland. Mercuria is active over a wide spectrum of global energy markets including crude oil and refined petroleum products, natural gas (including LNG), power, coal, biodiesel, vegetable oils and carbon emissions. It is one of the world's five largest independent energy traders and has a longstanding sector expertise.

In addition to its trading core, Mercuria has upstream and downstream assets ranging from oil reserves in Argentina, Canada and the US, to oil and products terminals in Europe and China, as well as substantial investment in the coal mining industry in South Africa, Indonesia, Colombia, and Russia, and bio fuels plants under construction in Germany and the Netherlands.

The company plays a dynamic, diversified and growing role in the global energy market. We provide our clients with customized solutions to their energy needs, using a creative flexible approach to pricing and logistics while maintaining strict risk management controls.

Our two Chinese-based subsidiary companies, Mercuria Energy Trading (Beijing) Co., Ltd and Mercuria Investment Consulting (Beijing) Co., Ltd work with important Chinese counterparts to bring oils to China and invest in logistic projects in energy sector including oil storage facilities and terminals to help this great nation grow and prosper.









摩科瑞能源贸易(北京)有限公司 摩科瑞投资咨询(北京)有限公司 北京市建外大街2号银泰中心C座4703室

邮編: 100022 电话: +86 10 8507 9800 传真: +86 10 8507 9899 www.mercuria.com Mercuria Energy Trading (Beijing) Co. Ltd. Mercuria Investment Consulting (Beijing) Co. Ltd. 4703 Yintai Office Tower C No. 2 Jianguomenwai Avenue Beijing 100022, P.R. China

Tel: +86 10 8507 9800 Fax: +86 10 8507 9899 www.mercuria.com

# Celebrating The 5th Anniversary

## The Swiss Consulate General and SwissCham in Guangzhou

### 瑞士驻广州总领事馆开馆暨瑞士商会 广州分会成立五周年庆

More than 80
Swiss companies
are currently
operational in the
"Greater Pearl River
Delta" in China's
South - a region,
which has become
one of the world's
most vibrant
economic regions.



From left: Hans Ruedi Kunz, Christian Guertler, Dante Martinelli (former Swiss Ambassador to PRC), Marc Aeschlimann, Werner Nievergelt (former Swiss Consul General Guangzhou)

Written by **Ulrich Hunn**, Consul General of Switzerland to Guangzhou 作者 **Ulrich Hunn**,瑞士驻广州总领事馆总领事

nly a few know that the first Swiss presence in South China dates back to 1847, when two missionaries from the Basel Mission were dispatched to this region. From the late 19th century onwards, the first Swiss business and craftsmen came to Canton. Many moved on to Beijing, where the imperial court was the main (business) partner.

Basel Mission in Laolong Town (Guangdong) still exists today, although now as a small Christian community. Reverend Tang

Zhaoping is very dedicated and under his guidance, two of the old Swiss mission buildings are now under renovation. The work is mostly done by volunteers. Let me know if you wish to get in touch with Reverend Tang, he is very proud of his Swiss connection and welcomes visitors and shows them around in the old campus and church.

As an important platform for versatile exchanges in culture, science, research, business and education, the Swiss Consulate opened





its doors in November 2006. It was the fourth pillar of the Swiss consular and diplomatic network in China, which includes our Embassy in Beijing and the Consulate General offices in Shanghai and Hong Kong. Besides the growing Swiss business community, one of the main reasons to open a consular representation in Southern China was the increasing demand for Swiss visas by Chinese citizens. Today, Switzerland is part of the Schengen space, and visa requests are continuously increasing. This year alone, we will have issued over 50% more visas than in 2010.

The development of the Pearl River Delta with its special economic zone has now reached full speed, but still attracts new Swiss businesses, investments and joint ventures. This year's visit of Federal Councillor Didier Burkhalter to Shenzhen, together with the ETHZ and EPFL presidents, shows that also exchanges in science and technology are on the agenda of our bilateral relations. This visit was followed by a very successful exhibition about Albert Einstein in the Science Centre in Guangzhou. The presence of 150 Swiss university sportsmen and women at the "Summer Universiade" in Shenzhen 2011 has also increased our exposure, as well as this year's "Music Home Festival" in Guangzhou, where we could once more welcome Swiss musicians.

The Consular district of the Consulate General has increased to 6 provinces from the beginning of 2011 and now includes Guangdong, Hainan, Jiangxi, Hunan, Fujian Provinces, as well as the Autonomous Region of Guangxi. The aim for the coming years is to increase our relations with those regions and show an even larger Swiss presence outside the Guangdong Province. These provinces too, often present extremely attractive business environment and are keen on knowing more about our beautiful country.

The Greater Pearl River Delta has become one of the most vibrant economic regions in the world. The majority of over 80 Swiss companies, including joint ventures and representative offices are still doing good business. The Consulate General and the Swiss Business Hub, with her representative in the Consulate General, are able to offer them, as well as newcomers, all the necessary assistance to be successful.

Since 2006:

### Swiss Business Network in Southern China

SwissCham Guangzhou is a platform to meet, connect and exchange

Written by Rene Forster, President of SwissCham Guangzhou 作者 Rene Forster,中国瑞士商会广州分会总裁

In the afternoon of March 31st 2006, around 40 representatives of Swiss companies gathered in the China Marriott Hotel in Guangzhou for a special purpose: To launch a new chapter of SwissCham in Guangzhou, covering the Southern China provinces of Guangdong, Guangxi, Fujian, and Hainan. Under the presence of the Ambassador of Switzerland in China, Mr. Dante Martinelli, the foundation stone was laid to the newest addition of SwissCham.

The new chapter primarily aims to set-up a network between the Swiss companies in Southern China. There are around 80 Swiss companies in the area of Guangdong, Guangxi, Fujian and Hainan and it is our major goal to create opportunities for these companies to meet, connect and exchange. The situation in Southern China is a challenging one, because most of the Swiss companies are widely scattered. There are many manufacturing companies that are located in more remote places. Nevertheless, the Guangzhou chapter has defined an additional goal: to bring its members together at least 6-8 events a year, which will further strengthen and develop the relationships between Swiss companies in Southern China. Since the inauguration in 2006, memberships have increased from a handful to almost 40 members by the end of 2011.

Swisscham is continuing to improve. We are delivering services to the existing members as well as prospective members. Last year has proven that new ideas, such as "GM round table" discussions are greatly appreciated events. Furthermore, inter-chamber activities will be discussed with other smaller chambers to enable Swisscham to participate in, and organize high quality forums. Since Swisscham Guangzhou is in the middle of Pearl River Delta, we also plan to develop a new relationship with SwissCham Hong Kong.



#### 世界最活跃的经济区之———大珠江三角区汇集了超过80间瑞士公司

**1** 少人知道,瑞士在华南地区最早的交流活动可以追溯到 1847 年,那时有两个传教士从巴塞尔的巴色会被派遣到这里。从 19 世纪后期开始,首批瑞士的生意人和工匠也来到了广东。他们很多人搬去了北京,当时朝廷是他们主要的生意伙伴。

在老隆(广东)的巴色会延续至今,尽管现在只是一个很小的基督教会。汤兆平牧师非常富有奉献精神,在他的带领下,两幢瑞士传道会的旧建筑正在翻新,翻新工作主要是由志愿者完成的。您可以向我索取汤牧师的联络方式,他为自己跟瑞士的联系而感到很自豪,他欢迎大家来访并会带访客参观旧的校园或者他的教堂。

作为文化、科研、商业和教育领域的各种交流活动的重要平台,瑞士驻广州总领事馆于 2006 年 11 月开馆。这是继北京的大使馆,上海和香港的总领事馆之后,瑞士在中国的领事和外交网络的第四根支柱。除了不断扩大的瑞士商业界之外,在华南地区开设领事代表处还有一个重要原因是中国居民对瑞士签证的需求增加。今天,瑞士是申根区的一部分,签证申请持续增长。光是今年,我们已经比 2010 年多签发了超过 50% 的签证。

珠三角地区及其经济特区的发展已经达到全速,但它仍然吸引着新的瑞士商人、投资者和合资企业到来。今年联邦委员迪·布尔克哈尔德(D.Burkhalter)到访了深圳,同行的还有瑞士联邦理工学院和洛桑联邦理工学院的校长们,表明在瑞中双边关系里科技交流已被提上日程。在此之前,爱因斯坦展在广州科学中心展出,非常成功。2011年深圳的大运会上,150 名来自瑞士大学的运动员同样增加了瑞士的曝光率。此外,今年广州的"音乐'家'音乐季"活动我们也再次迎来了瑞士的音乐家。

从 2011 年开始,瑞士驻广州总领事馆的领区扩大到了六个省区,现在包括了广东、海南、江西、湖南、福建和广西壮族自治区。未来的目标是增进我们跟这些区域的合作关系,在广东以外的区域更多地开展瑞士和当地的交流活动。同样地,这些省区也展示了极富吸引力的营商环境,同时渴望增进对我国的了解。

大珠三角地区已经成为世界上最有活力的经济区之一。这里汇集了超过80间瑞士公司,包括合资企业和代表处,他们中的绝大部分经营状况良好。瑞士驻广州总领事馆,以及代表处位于总领馆内的瑞士商务促进中心,能为这些商业机构以及新来的企业提供所有必要的协助以帮助他们获得成功。

中国南部的瑞士商业网

瑞士商会广州分会是华南地区的 瑞士企业进行联络的平台

In 2006: SwissCham expands in Southern China

2006 年开始,瑞士商会就已 经进入中国南部。

2006年3月31日下午,40位瑞士公司代表齐集中国万豪酒店,在瑞士驻中国大使马提内利先生的见证下,瑞士商会广州分会正式在广州成立。瑞士商会广州分会覆盖整个华南区域,如广东,广西,福建,海南等省区。

新分会的主要目标是为华南区域的瑞士公司设立一个沟通平台。在广东,广西,福建和海南分布着约有 80 多家瑞士公司,而新分会的设立,就是为了向华南区域的瑞士公司提供联络平台,以满足相互之间的联络与沟通需求。华南地区是一个具有挑战性的区域,瑞士企业广泛地分布在不同的省市内,当中有着大量制造和生产的企业,而这些生产型的企业一般都设在较为偏远的地区。为此广州分会担负着一个重要使命,每年为会员提供不少于 6-8 次的活动,以进一步加强与巩固华南区各瑞士企业的沟通联系。5 年前来,广州分会由 2006 刚成立时仅有的几个会员,逐步增长到 2011 年底接近 40 个会员。

瑞士商会秉承创新,持续改善的新思路,不断地为瑞士商会的准会员及新会员提供更好的服务。在去年的活动中,总经理圆桌会议便是其中一个标志性的事件。此外,商会将联合其他商会共同探讨参与或组织高质素的论坛活动。瑞士商会广州分会凭借着珠江三角的地理优势,能与香港瑞士商会发展新的合作关系,开拓新思路,共同承办商会活动。





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## **Diplomatic Traffic:**Recent and Upcoming Visits and Events

### 外交往来: 近期的外交访问和活动

Information kindly provided by the Embassy of Switzerland in China 由瑞士驻华大使馆提供

#### **Past Events**

#### **3rd Round of FTA Negotiation:**

The third round of the negotiations on the Switzerland-China Free Trade Agreement was held from November 7-11 in Montreux, Switzerland. The Swiss delegation was headed by Ambassador Christian Etter, Delegate of the Swiss Government for Trade Agreements, State Secretariat for Economic Affairs, (Federal Department of Economic Affairs). The Chinese delegation was led by Mr. Zhu Hong, Deputy Director General of the Department of International Trade and Economic Affairs, Ministry of Commerce of the People's Republic of China. During the third round, expert level discussions continued and further exchanges of information on respective regulatory systems and FTA-practices took place with regard to the following areas: trade in goods, trade in services, rules of origin, customs procedures and trade facilitation, technical barriers to trade (TBT) and sanitary and phytosanitary measures (SPS), trade remedies, intellectual property rights, competition and dispute settlement. Heads of delegations and experts discussed investment promotion, cooperation on trade and sustainable development, and cooperation on government procurement. Follow-up work was agreed in all areas. A next round of negotiations is expected to take place in the first quarter 2012 in China.

#### 5th Round of IPR Dialogue

From November 21st to 25th, 2011, a delegation from the Swiss Federal Institute for Intellectual Property (IPI), led by their Deputy Director Dr. Felix Addor, visited China to attend the 5th Working Group meeting in the framework of the Sino-Swiss annual dialog on IPR issues (Intellectual Property Rights). The delegation used the opportunity to hold also a series of bilateral meetings with Chinese agencies involved in these questions, to have contacts with Chinese academics and foreign experts.

#### **Upcoming Events**

#### Visit of State Secretary Ineichen-Fleisch

At the beginning of 2012, the Swiss State Secretary for Economic Affairs, Marie-Gabrielle Ineichen-Fleisch, is expected to pay her first official visit to China, in order to discuss various topics and meet her Chinese counterparts. However, this visit is not confirmed yet.

#### Visit State Secretary Mr. Mauro Dell'Ambrogio

In March 2012, the State Secretary for Education and Research, Mr. Mauro Dell'Ambrogio, is expected to visit China. He is expected to meet with his counterparts, the ministers of education, science and technology and to consolidate the cooperation which has been intensified in this field of growing importance in our bilateral relations over the last years.

#### Visit of Federal Councillor Johnann Schneider-Ammann:

This visit of Federal Councillor Johann Schneider-Ammann who presides over the Federal Department of Economic Affairs is scheduled for July 2012 but still needs to be confirmed.

#### **Non-official Events**

#### Inaugural Swiss Flight on February 12th, 2012

February 12th, 2012 is scheduled for the inaugural flight of Swiss Airlines' direct connection between Zurich and Beijing. It is possible that some senior officials from Switzerland will come to Beijing on this occasion.

#### **Opening Einstein Exhibition**

On March 2nd, 2012 the Opening of the Einstein Exhibition is expected to take place at the Wuhan Science and Technology Museum. The Einstein Exhibition of the Berne Historical Museum has been a big success so far, with over 800'000 visitors in Beijing, Guangzhou and Hong Kong. Therefore, we have decided to show it again in Mainland China, in Wuhan. The exhibition will increase Switzerland's visibility and promote our country as a modern, high-tech place of innovation in the rapidly developing capital of central China.

#### 第三轮 FTA 谈判

中瑞自由贸易协定第三轮谈判于11月7日至11日在瑞士蒙特勒举行。 瑞士代表团由瑞士政府贸易协定代表团大使、国家经济事务秘书处(归 属瑞士联邦经济事务部)负责人 Christian Etter 率领。中国代表团由中 国商务部国际司副司长朱洪率领。在本轮谈判中,双方继续进行了专 家级的讨论,并进一步就商品贸易、服务贸易、原产地规则、简化海 关手续、技术性贸易壁垒 (TBT) 和动植物卫生检疫措施 (SPS)、贸易救济、 知识产权、竞争和争议解决等方面的规范制度和 FTA 实践进行了信息 交流。双方代表团的负责人和专家还就投资促进、贸易与可持续性发 展合作以及政府采购合作等方面进行了讨论。双方一致表示将对这些 领域进行进一步的探讨,下一轮谈判将于 2012 年第一季度在中国举行。

#### 第五轮知识产权对话

自 2011年11月21日至25日期间,由瑞士知识产权联邦机构Felix Addor 博士率领的代表团对中国进行了访问并参加了中瑞年度知识产 权问题对话框架第五次工作小组会议。代表团也利用这次机会就知识 产权问题与中国相关机构召开了一系列的双边会议, 并与中国学者和 外国专家建立了联系。

#### 国务秘书 Ineichen-Fleisch 访华

2012年初,瑞士联邦政府经济事务国务秘书 Marie-Gabrielle Ineichen-Fleisch 将首次对中国进行正式访问,就不同的经济课题与中方展开讨 论。目前该访问尚未最终确定。

#### 国务秘书 Mauro Dell'Ambrogio 访华

2012年3月,瑞士联邦教育与研究部国务秘书 Mauro Dell'Ambrogio 将访华。他将会见中国教育部和科技部部长,并进一步巩固双方在过 去几年里不断强化的双边合作关系。

#### 联邦议员 Johnann Schneider-Ammann 访华

瑞士联邦经济事务部部长、联邦议员 Johnann Schneider-Ammann 计 划于 2012 年 7 月访华, 具体日程尚未确定。

#### 2012年2月12日瑞士航班首次通航

2012年2月12日,瑞士航空首班直飞苏黎世和北京的航班将 正式通航。届时瑞士高级官员将可能趁此机会访问北京。

#### 爱因斯坦展览

2012年3月2日,爱因斯坦展览将在武汉科技馆开幕。迄今为 止, 伯尔尼历史博物馆的爱因斯坦展览在北京、广州和香港共 接待了80万余名观众,取得了很大的成功。因此,我们决定 在中国的内陆城市武汉再次推出该展览。展览将增加人们对瑞 士的认识, 使中国迅速发展的中部地区了解瑞士这个现代化和 高科技创新的国家。

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- Receive a free membership directory

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- Key contacts and networking opportunities
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- Translation and interpretation
- Event consulting and venues search

#### Contact the Swiss Chinese Chamber of Commerce

#### SwissCham Beijing

Address: Room 1108, Kunsha Center, Tel: +86 10 8468 3982

Email: info@bei.swisscham.org

#### SwissCham Shanghai

Address: Room 1612, Regus Silver Center No 1388 North Shaan Xi. Road. Shandhai Tel: +86 21 6149 8207 Email: info@sha.swisscham.org

Address: 27th Floor Grand Tower **Tel:** +86 760 8858 1020 Email: info@swisscham-gz.org

SwissCham Guangzhou

#### SwissCham Hong Kong

C/O Consulate General of Switzerland in Hong Kong Address: Suite 6206-07. Central Plaza. No.18 Harbour Email: admin@swisschamhk.org

### "实现2011"——

### 架起瑞士苏黎世联邦理工大学与同济大学的桥梁

### ETH Zurich Ballbot Builds Sino-Swiss Bridge

"The "Realize 2011" will be an outstanding experience for all the students involved and a starting point for more collaboration and innovation between Tongji and ETH."

Prof. Dr. Roland Siegwart, Vice President Research and Corporate Relations

The project "Realize 2011" arose from the development of a ballbot, a robot able to balance and move on a single sphere (http://www.rezero.ethz.ch/project\_en.html). Due to strong market demand the project "Realize 2011" aims at further developing the ballbot's omni-directional wheels. Prof. Dr. R. Siegwart, ETH Vice President Research and Corporate Relations, initiated the project not only to advance with the technical development but also to seize the opportunity to work together with a Chinese University in order to gain further experience in Sino-Swiss collaborations. To find a best-matching partner Prof. R. Siegwart received support from swissnex China: The platform which promotes knowledge exchange between Switzerland and China in science, research, higher education and art connected Prof. Zhou Aiguo and his students from Tongji University with the ETH Zurich. The common project was kicked off in September 2011 and includes a 6-month stay from the ETH Zurich students Michael Neunert and Fabio Diem at Tongji University. The goal is to bring back to Switzerland the first batch of wheels

#### Cultural exchange through academic collaboration

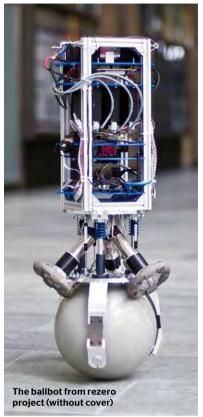
The advantages China can offer for the "Realize 2011" project are various: shorter lead times and faster production, which means considerable cost savings. At the moment the special wheels cost 15000 RMB per piece and the students aim at bringing the costs down to around 300 RMB per piece. To find a matching company which will produce the wheels, the two ETH students could count on personal contacts from

their Chinese colleagues as well as business to business platforms on the internet. Michael Neunert states: "Chinese companies are very quick, flexible and eager to make business and they know their métier very well, therefore it was quite easy to find suitable partners for the production". However language is a big barrier, as many company websites are in Chinese and this makes the support from Tongji University very important. As a partner Tongji University participates in all stages of the project, most important during the redesign phase as well as in the search for production sites and manufacturing partners. Besides the institute's good infrastructure its renown paves the way for business opportunities. "We cannot emphasize the importance of Tongji University, our local contact, Prof. Zhou and his students enough. Without them this project would be impossible", clarify the two ETH students. Also the Chinese side is pleased about the very fruitful exchange of this Sino-Swiss project, as student Hong Jia explains: "Both sides can learn a lot from each other on a professional as well as personal level, through academic collaboration we exchange our culture and ideas."

The end-consumers will find the development of the joint project for example on shopping and push cars, sack borrows, toys or sport equipments and later also in new transportation devices or house-hold robots.

swissnex China accompanies and supports the students during the whole project duration. If you wish more information on "Realize 2011" and the robot rezero visit our website: www.swissnexchina.org

made in China.









"通过 Realize2011 这一具有启发性的项目,同济大学和苏黎世联邦理工大学工程学科的学生们共同合作,互相学习。我相信,所有参与此项目的学生都将获得一次非同寻常的经历。这个项目也是同济大学和苏黎世联邦理工大学开展更多合作和创新的开始。"

Prof. Dr. Roland Siegwart, 苏黎世联邦理工大学科研及国际关系副校长

实现 2011"(Rezero 2011)项目源自于球形机器人的发展,此类机器人能够在单 一球面上保持平衡并行动自如。(http://www. rezero.ethz.ch/project en.html )。为了迎合市 场的强劲需求,该项目正进一步研发球形机 器人的万向轮。"实现 2011"项目由苏黎世联 邦理工大学主管研发与企业关系的副校长 R. Siegwart 教授发起,此举不仅旨在促进技术 发展, 更是为了抓住与中国院校合作的机会, 从中获取更多的中瑞合作经验。为了寻求最 佳合作伙伴, Siegwart 教授找到了瑞士联邦政 府科技文化中心(swissnex China)-个致力于在科学、创新和技术领域推广和联 结瑞士优势资源,并且促进中瑞双方交流与 合作的平台。在此项目中, 瑞士科技文化中 心促成了同济大学周爱国教授及他的学生与 瑞方的通力合作。合作项目于2011年9月正 式开始,两位来自苏黎世联邦理工大学的学 生 Michael Neunert 和 Fabio Diem 将在在同 济大学进行为期6个月的科研工作。其任务 是将中国制造的第一批万向轮带回瑞士。

#### 瑞士联邦政府科技文化中心——中 瑞关系发展之桥梁

中国能够为"实现2011"项目提供帮 助的优势是多重的:缩短工程时间,加快生 产步伐, 这意味着可以降低一笔相当可观的 生产成本。为了寻求到匹配的车轮生产商, 苏黎世联邦理工大学的学生可以借助他们中 国同事的人际网络平台讲行联络, 也可以 通过企业对企业的电子商务平台进行联系。 Michael Neunert 指出:"中国公司的行动非 常迅速、灵活而且对生意态度积极。他们对 自身的专长了如指掌, 因此我们能够很容易 找到合适的生产合作商。"尽管如此,彼此 之间的语言障碍仍然是一个大问题,许多中 国公司的网站语言都是中文, 因此同济大学 的帮助极为重要。作为合作伙伴, 同济大学 参与了项目的整个过程。包括再设计层面、 产品调查,以及制造商等重要方面。除此之 外,学院有着良好的基础设施,这为商业合 作铺平了道路。中方对整个项目有着举足轻 重的作用:"我们的当地联络人——同济大 学,周教授以及他的学生们对我们的帮助实在太大了。如果没有他们的帮助,这个项目是无法完成的",两位瑞士学生感慨道。同样地,中方也十分乐意帮忙,一个中国学生宏霞(Hongxia)说:"在专业领域及个人交流方面,我们都能从对方学到很多。通过学术合作,我们增进了文化和思想的交流"。

通过这个项目,终端消费者将会看到万 向轮在诸如购物推车、玩具、运动器械,以 及未来新型交通工具和家用机器人等诸多领域的广泛应用。

若要了解更多详细信息,敬请登录 www.swissnexchina.org



#### 瑞士苏黎世应用技术大学

### 跨越边界是我们的座右铭

### Used to Crossing Borders – The Zurich University of Applied Sciences



In January 2011, a delegation from the ZHAW travelled to Southeast Asia to witness for themselves the rapid economic growth and the broad interest of the Asian countries in application-oriented research and teaching in the West. Since then, several delegations from Asian universities have visited the ZHAW. With the recent visit of the North China University of Technology in Peking, we agreed to deepen the exchange.

#### **ZHAW School of Engineering in China**

The growth rates of the Asian markets are striking. It is still more striking to see an example of this tremendous development taking place in a production facility there. Master's students at the ZHAW School of Engineering had this opportunity. As part of a module in the MSE Master of Science in Engineering in China they visited Chinese firms and the Suzhou industrial park. Thirty-six of the world's 500 strongest companies invested in China's third largest industrial park. With the five pillars of microelectronics, precision instruments, biopharmaceuticals, new synthetic materials and highend routing industry, the park has quickly moved to become a high-

tech area. There, the students visited a production facility of Unitron Hearing (Suzhou) Ltd., a subsidiary of the Swiss Sonova-Gruppe (Phonak), as an example of a how Swiss companies are building their international supply chain through investments and partnerships in China. In addition to site visits, group work and homework was overseen by various Swiss and Chinese professors of precision manufacturing in Asia.

The ZHAW School of Engineering is cognizant of the importance of such cooperation and exchanges with Chinese Universities as partners for the future. Therefore, they would like to launch joint research projects, motivate faculty sabbaticals in China, or arrange for students to attend summer schools in China during the semester breaks. A summer school – similar to the established one in Minnesota (USA) – in cooperation with the North China University of Technology in Peking or at Hong Kong Polytechnic University is envisioned. The students should on the one hand be taught technical subjects and visit local businesses; on the other hand, and above all, they should get to know the country and its culture.



2011年1月,ZHAW 组团到东南亚,亲眼目睹了亚洲经济的飞速发展以及亚洲国家对于西方应用技术的研究与教学的浓厚兴趣。此后,许多亚洲大学代表团也拜访 ZHAW。最近来访的中国北方工业大学与 ZHAW 就进一步加深交流达成共识。

#### 苏黎世应用科技技大学工程系在中国

亚洲市场的增长率令人叹为观止。更吸引人的莫过于能在当地生产企业亲历这种飞速发展。作为他们课程的一部分,ZHAW 工程系的研究生们,就有机会参观中国企业和苏州工业园区。苏州工业园是中国第三大工业园区,已有 36 家世界 500 强企业在此投资。随着微电子,精密仪器,生物制药,新合成材料,和高端通信科技这五大支柱产业的迅猛发展,工业园区已发展为高科技园区。在那里,学生们参观了瑞士 Sonova-Gruppe (Phonak) 的子公司优利康听力技术苏州有限公司并以此为案例介绍瑞士企业是如何通过投资、合伙人关系来建立他们的国际供应链的。来自中瑞两国精密制造业的教授还辅导学生分组讨论和课后作业。

苏黎世应用科技大学工程系已经认识到日后与中国大学合作和交流的重要性。大学希望开展联合科研项目,激励教师来中国交流访问或组织学生暑期到中国参加夏令营。一个与中国北方工业大学(北京)或香港理工大学合办的,类似于在美国明尼苏达州创立的令营活动已经在孕育当中。通过该活动,学生们不仅能学习专业知识,参观本地企业,而且还可以从中了解中国和中国文化。



#### Contact 联系方式

ZHAW Zurich University of Applied Sciences

#### Dr. Frank Wittmann

Head of International Affairs Unit

Phone **+41 58 934 89 46** E-Mail **frank.wittmann@zhaw.ch**  ZHAW 苏黎世应用科技大学

#### 弗兰克维特曼博士

国际事务部主任

电话 +41589348946 电邮 frank.wittmann@zhaw.ch

#### **Zurich University of Applied Sciences**

The Zurich University of Applied Sciences ZHAW is one of the leading Swiss Universities of Applied Sciences with national and international significance. Its three facilities are located in the heart of the Greater Zurich Area, a platform in the globalized world. In addition to the ETH Zurich and Zurich University, the ZHAW complements the educational spectrum in this region.

The ZHAW offers numerous bachelor's and master's programs and training opportunities in the fields of architecture and civil engineering, health, applied linguistics, life sciences, facility management, applied psychology, social work, engineering, management and business law. The university is practice-oriented but scientifically grounded - in teaching, research, development and consultancy. Cooperation with national and international academic and business partners is hence extremely important.

ZHAW graduates are competitive in the job market after graduation, because in contrast to research university graduates, they have already acquired professional experience. Work skills today include international competencies: foreign language skills, intercultural know-how, international knowledge and openness. These skills are central to the effective cooperation in multinational teams and for the successful handling of foreign contacts. The teaching of these skills is therefore a clearly formulated goal of ZHAW. To this end, the ZHAW offers internationally-oriented programs and continually diversifies the mobility programs. Already there are more than 200 agreements with partner universities on all five continents - including several in China. The ZHAW has recognized that China offers great possibilities and opportunities, not only for businesses, but also for universities.

#### 苏黎世应用技术大学

苏黎世应用科技大学(ZHAW)是瑞士职业技术类大学的典范,其声誉享誉全球。它有三个学院位于大苏黎世地区中心,是世界大融合中的一个平台。与苏黎世联邦理工学院,苏黎世大学并存,ZHAW有力补充了空缺,使苏黎世区的教育体制更完善。

ZHAW设有丰富的本科、硕士及职业培训专业,涉及领域分别为:建筑工程学、健康学、应用语言学,生命科学、设施管理学、应用心理学、社会学、工程学,学和法律学。大学将以科技为基础、以实践为方向一的思想贯穿教学、研发及咨询工作中;并把与国内外知名学府及企业界伙伴合作放在举足轻重的地位上。

与只懂理论的大学毕业生相比, ZHAW的毕业生具备职业技能和经验, 在人才市场上有强大竞争力。如今职业技能的定义中还包括国际竞争力, 具体说是: 多语言能力, 跨文化交际能力, 国际知识及开放的胸襟。这些能力是实现多民族团队有效合作及国际合同顺利签订的中心保障。ZHAW在教学中明确规划了对学生国际竞争力的培养, 为他们安排了与国际接轨的项目,并不断丰富这些项目。大学已与5大洲的200多个大学建立了伙伴关系(其中包括几所中国大学)。ZHAW认识到, 不仅对于企业, 对大学来说中国同样有着巨大的潜力与机遇。



### The Chinese Viewpoint

#### Impressions and anecdotes of living in Switzerland

### 中国视角

旅居瑞士的印象和轶事

Interview • Jeyanthy Geymeier, General Manager SwissCham Beijing 访谈\_Jeyanthy Geymeier, 中国瑞士商会北京分会总经理

My traditions and my identity will never change

我的身份和我所遵循的习俗 永远不会改变。 Chinese national Ms. Liu open-heartedly shared her experiences as a Chinese immigrant in Switzerland. She was born into a well educated family in Anhui Province and migrated to Switzerland at the age of 34, because of personal reasons and lived there for over ten years. She has now permanently returned to China and is the General Manager of a Swiss graphic design company. In the following, she tells us how she integrated herself into the Swiss society and how she perceives the Swiss mentality in comparison to her homeland.

hen I arrived in Switzerland, I told myself that I am now in a new country, a country that has welcomed me. I needed to follow their rules, to respect their customs and culture, and to adapt. So, I tried to act like a Swiss person and also attended French classes. In the end, however, I didn't' really follow the Swiss traditions and culture. Christmas was just an occasion for my family to have a nice meal in a restaurant. But at home, we wouldn't decorate a Christmas tree. It is the same with the Swiss National Day: On that day, we would enjoy watching fireworks and celebrate with everybody. However, it does not have a special meaning for me.

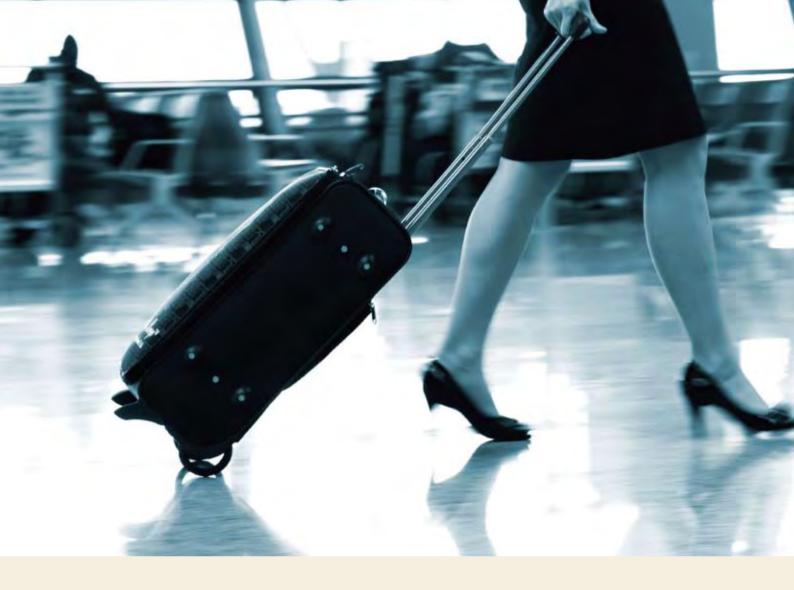




I didn't find it difficult to live in Switzerland at all. Nevertheless, I often gathered with my Chinese friends to ease my homesickness. I will always be a Chinese. No matter where I live, in Switzerland or in another foreign country, my traditions and my identity will never change. I have always kept a close contact with my homeland by returning at least twice a year to China to see my family. This way, I constantly kept my Chinese identity alive.

However, what has changed over time is not my identity, but the way I am being approached by Swiss people. Ten years ago, I felt like they were looking at me as if I was an exotic person and they wouldn't know the difference between China and Japan. To them, I just came from some Asian, remote country. But now, the first thing people would ask me in the street is whether I am Chinese. The Swiss have become very curious and want to know more about my country by asking me all sorts of questions.

There are of course differences between the two mentalities. One thing that impresses me most in Switzerland is that the Swiss people like to do everything by the rule. They cannot conceive doing something that is against it. They would always think first what is allowed and what is not before acting. Chinese people, on the contrary, are more opportunists. Once a goal is set, Chinese use any means to achieve it no matter whether it is within the legal frame or not. They would find a way to go around the law to reach that goal in a 'non criminal' way. In my opinion, Chinese people have always been like that. This doesn't mean that there are no laws in China. The problem lies in its implementation.



Another difference is the focus. Swiss people focus on one single activity. They would focus, for example, only on one job by growing into it and perfecting it. Chinese people, on the other hand, think in all directions. It is uncommon to see them focusing only on their actual job. They might have another side business and even be involved in a third one during the weekends to help their friends. In other words, they don't put all their eggs in one basket. This could be explained by the need and desire of Chinese people to earn enough money for their retirement or to provide a good education and extracurricular activities for their only child.

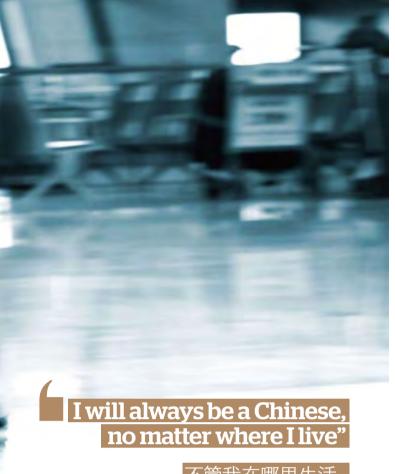
To satisfy this need, Chinese people would use as many means as possible and would not mind working seven days a week. Actually, there is no concept of weekend in China; Sunday is as busy, if not more, as a Monday. The competition among Chinese is very high in the job market and this adds a lot of pressure on themselves. If they won't go the extra mile, they will quickly be overtaken by others, who will get promoted or receive a salary raise. So compared to China, Swiss people live in a comfortable country with various benefits, such as a good social insurance. There is little competition on the job market, so everyone gets more or less a part of the cake.

Master Degree Essay "Life Stories of families with Chinese origins in the French speaking part of Switzerland: Identity & Integration in the Swiss Society" by Jeyanthy Geymeier. Hard copy is available at the Chinese Library of the University of Geneva. The original text has been shortened and edited for The Bridge. 瑞士移民刘女士开诚布公的跟我们分享了她作为一个中国人旅居瑞士的经历。她出生在安徽省一个受过良好教育的家庭,在34岁的时候,由于某些个人原因,她移民至瑞士,并在那里居住了十年。现在,她回到中国,并成为一家瑞士制图设计公司的总经理。刘女士在本文中向我们讲述了她融入瑞士社会的经历以及她对瑞士人和中国人的比较。

**至**了瑞士以后,我对自己说,我来到了一个新的国家,一个对我表示欢迎的国家。我必须遵循这里的规则,尊重瑞士人的习俗和文化,尽快适应这里的生活。因此,我开始像瑞士人一样生活,并开始学习法语。不过,到头来,我还是没有真正的融入到瑞士的传统和文化中。圣诞节对于我的家人来说只是一次到餐厅美美的吃上一顿的机会,我们家里并不会布置圣诞树。另外一个例子是瑞士的国庆节。这一天,我们像其他人一样看烟花,和大家一起庆祝。不过,这个节日对于我来说并没有特殊的意义。

我发现在瑞士生活一点都不困难。不过,为了舒解对家乡的思念,我常常会跟许多中国朋友聚在一起。不管我住在哪里,不管是在瑞士还是另一个国家,我都是一个中国人,我的身份和我所遵循的习俗永远都不会改变。我每年至少会回国两次探望我的家人,这样,我就可以保持我的中国人的身份不变。

随着时间的流逝,发生变化的不是我的身份,而是瑞士人对待我的方式。十年前,他们看待我就像我是一个来自异域的怪人,他们分不清中国和日本。对于瑞士人来说,我来自于亚洲某个遥远的国家。现在不同了,当我走在街上,人们问我的第一件事就是我是不是来自中国。瑞士人开始对我和我的国家十分好奇,总问我各种各样的问题。



Swiss people like to do everything by the rule. That impresses me.

瑞士人给我印象最深刻的 就是他们做任何事情 都按照规则来。





## 中国人和瑞士人的思维方式是很不同的。瑞士人给我印象最深刻的是他们做任何事情都按照规则来,他们不能接受违背规则的行为。在做事之前,他们总是会考虑什么可以做,什么不可以做。正相反,中国人是机会主义者。一旦目标确定,中国人会采取一切可能的措施来实现目标。他们可以找到绕过法律的"合

法"的方式来完成目标。在我的印象中,中国人一直都是这样的。

这并不是说中国没有法律,问题是法律的执行情况。

另一点不同之处是专注。瑞士人会专注于某项单一的活动,比如说,他们会专注于某一项工作,在其中投入许多心思,使之变得更加完美。而中国人的思维方式则是多方面的,很少有人会只专注于他们的实际工作。他们常常会有其他的生意,甚至有在周末的时候帮助朋友这样的第三份工作。我想这一点可以用中国人希望并渴望赚到足够的钱来养老或是供应孩子接受良好的教育和课外活动来解释。

为了达到这一目的,中国人会利用一切可以利用的机会,哪怕一周工作七天。事实上,在中国并没有周末的意识:周日跟周一一样忙。中国人承受着巨大的找工作的压力,如果他们不做一点额外的事情,他们很快就会被其他人超越。因此,与中国人相比,瑞士人生活在一个拥有良好社会保障的舒服的国家里,工作竞争压力很小,每个人多少都能分到一杯羹。











 $\label{eq:local_problem} \begin{tabular}{l} he world's most extensive urbanization process is currently taking place in China. In the next twenty years, an estimated 280 million Chinese villagers will become city dwellers, attracted by urban jobs and opportunities. This process of rapid and massive urbanization has exacted a very high price in the countryside: China's cultural spaces in rural areas are steadily vanishing. The loss of old-established traditions, lifestyles, architecture and natural heritages is inevitable in the process of modernization. Many once historically and culturally important regions are already deserted, leaving behind only desolation and in some cases a feeling of nostalgia.$ 

Over the past eight years, Swiss scholar and photographer Matthias Messmer and Taiwanese cultural researcher Hsin-Mei Chuang have been working on a photo-text project: "The Vanishing World of Rural China." They have traveled to dozens of remote rural areas to collect material for this remarkable book. Much of their time was spent in regions that are still largely unknown to an international public, or even to the majority of Chinese people. This project is not focused on tourist attractions, but rather on the hidden traditional "Lebenswelten" beyond China's urban areas and the glittering lifestyles of those metropolises.

The "aesthetics" of these photos – although sometimes evoking a sad, despairing or melancholy mood – bring the reality of rural China to viewers in a deeper and more personal way. On the one hand, this book documents changing rural China, and on the other hand, it calls for reflection on the process of modernization, the loss of historical traces and the destiny of millions of peasant farmers who still lead lives full of hardship or even misery.

The authors say they hope that this book will stimulate readers' curiosity and awaken their interest in the fascinating diversity of rural China and its people, who still make up two-thirds of the country's population.

Interested companies, organizations and individuals are encouraged to sponsor this publishing project by direct co-financing or by placing prepublication orders (e.g. as a company gift) in bulk. Please contact either Hsin-Mei Chuang (hsmchuang@gmail.com) or Matthias Messmer (Matthias.Messmer@gmx.ch) for further information.





IZIS Elderly peasants make up the majority of rural inhabitants. While their children strive for a better future in cities, they have to cope with their own problems of life and health alone [Sicheng Village, Hunan Province; Lijiashan Village, Shanxi Province; Meitao Village, Hainan Province]

Many older farmers yearn for Mao's Era, as they consider the society back then more equal [Wuyuan County, Jiangxi Province]

El Although modernization has taken its toll even in remote regions, life in most Tibetan inhabited areas is still very traditional [Garze Tibetan Autonomous Prefecture, Sichuan Province]









界最彻底的城市化进程正在中国进行。在今后 20 年里, 受更多的就业机会和其他机遇的吸引,中国约 28 亿农村人口将移居城市。这一快速而大规模的城市化过程将迫使农村付出高昂的代价:中国在农村地区的文化空间正在不断消逝。现代化的过程不可避免的伴随着古老的传统、生活方式、建筑和自然文化遗产的丢失。许多曾经十分重要的历史和文化区域被舍弃,留下的只是一片荒芜的景象和对往昔的

过去八年里,瑞士学者、摄影师 Matthias Messmer 和台湾文化工作者庄新眉一直在进行着一个名为"消逝中的中国农村"的图文项目。他们前往中国边远的农村搜集资料,尤其是那些不为西方甚至是大多数中国人所知的地区,为这本书提供了大量的珍贵素材。该项目不为吸引游客,而是探索中国城市地区和都市生活之外隐藏着的传统"生活世界"。

这些图片所呈现的"美学"——尽管有的时候唤起的是悲伤、绝望和沮丧的情绪——以一种更深刻、更私人的方式向观赏者传达了中国农村的现实。一方面,这本书记录了不断变化的中国农村世界;另一方面,它激发人们对现代化进程中丢失的历史遗迹和仍在苦难生活中挣扎的农民的命运进

作者希望本书可以激起读者的好奇心,唤醒他们对多样 化而迷人的农村世界和占中国人口三分之二的农民的兴趣。

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☑ Kaiping, Guangdong Province

Actors of an itinerant wood puppet troupe, Hainan Province

Workers at a state granary [Songjianghe Town, Jilin Province]

☐ Dikan'er Village, Xinjiang Uyghur Autonomous Region









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Deepening the understanding of Chinese culture and traditions in the West:

### Titoni Ltd sponsors Peking Opera Exhibition in Basel

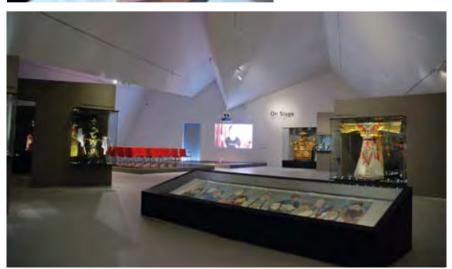




Above: Mr. Daniel Schluep, CEO of Titoni Ltd.; Mr. Jacques Herzog, founder and partner of Herzog & de Meuron Architects; Mr. Qin Huasheng, director of the Mei Lanfang Museum (from left to right).

Middle: A Peking-opera artist is getting dressed-up.

**Below:** On Stage - the Art of Peking Opera exhibition at the Basel Museum of Cultures.



Based on the long-standing relationship with China and a personal interest in Chinese culture, the CEO of the famous Swiss watchmaker Titoni Ltd., Daniel Schluep, is sponsoring a major Chinese exhibition in Switzerland. Following a ten-year renovation, the Basel Museum of Cultures, one of the most important museums of ethnography in Europe, re-opened its doors to the public at the beginning of September with the exhibition: On Stage-the Art of Peking Opera. Traditional objects as well as contemporary works of art inspired by the world-famous Peking Opera are on display in the city of Basel. The traditional building was partly designed by Swiss architects Herzog & de Meuron, the star team of the eye-catching National Stadium, the Bird's Nest, for the Beijing Olympic games in 2008.

The motivation for Titoni's sponsorship was not only Mr. Schluep's love of Chinese culture and arts but also the beautiful objects on show that had been owned by the late Peking Opera master Mei Lanfang. His extraordinary costumes and private art collection demonstrate the traditional Chinese elite's aesthetics perfectly. In addition, the Chinese name for Titoni Ltd. and the name of the late Peking Opera master do share something in common - the Chinese character "mei"(梅). At the reopening reception in Basel, the director of the Mei Lanfang Memorial Museum, Mr. Qin Huasheng, greeted Mr. Schluep and told him that "meihua" (plum blossom), was indeed one of Mei Lanfang's favorite painting objects. They chatted pleasantly about the celebrated artist Mei Lanfang and Titoni's long-standing popularity in China.

For the Grenchen-based Titoni Ltd. and Mr. Schluep personally, this sponsorship means a healthy return to society and

its cultural dimension as a responsible Swiss enterprise. "Titoni Ltd. has enjoyed the support of many Chinese clients over the past fifty years. We wanted to give something back in a positive way. We'd like to deepen the understanding of Chinese culture and traditions in the West," commented Mr. Schluep during the ceremony.

The newly designed space of the Basel Museum of Cultures invites the public to visit its lively yet quiet hanging garden in the courtyard before entering the building. The On Stage—the Art of Peking Opera exhibition presents works of art from several famous Chinese and Swiss institutions and artists. It runs from September 7th, 2011 to March 4th, 2012.



### Background

Daniel Schluep, the current CEO of Titoni Ltd., pays great attention to the welfare of the society where his company is doing business. For the grandson of the founder of this family enterprise, sponsoring cultural and social activities have always been part of Titoni's tradition of sharing its business success for many years.

In 2011, Titoni for instance sponsored a three-week long tour of a Swiss senior high school class from Solothurn to China. Furthermore, the company, which was founded in 1919, invited two Chinese grandmasters to the international chess festival in Biel in the summer of this year. Titoni Ltd. also vowed to continue its support of the Chengdu-based Giant Panda



Breeding Research Foundation. The company adopted another Panda baby-girl and named it "Haidi" - a symbol to further strengthen the relationship between Switzerland and the capital of Sichuan Province.



