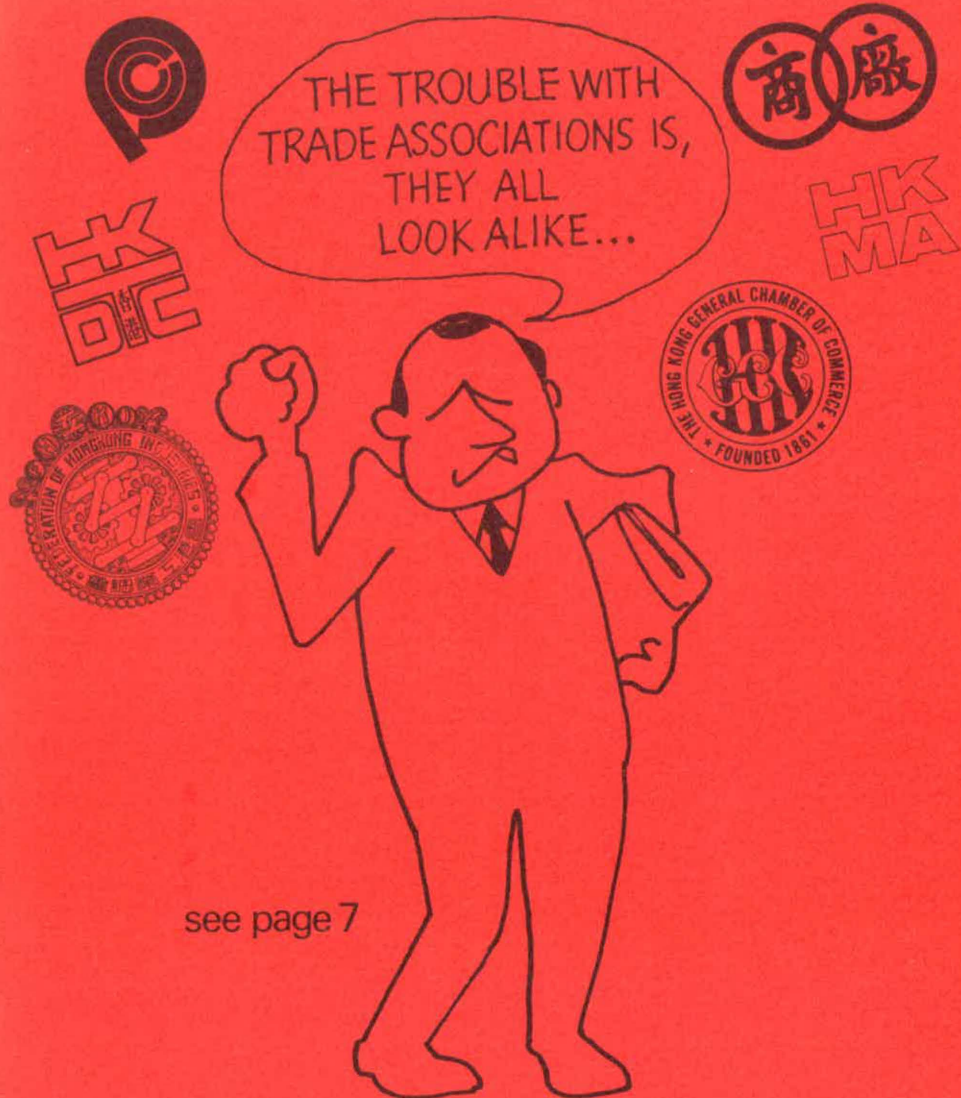




The Bulletin



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本會執行董事麥理覺短評

歡渡春節

迎接龍年

本會於二月十二日假座新都酒樓舉行首次春茗聯歡晚會。會員商行踴躍赴會，歡聚一堂，席開近六十桌。酒菜豐盛、表演精彩、氣氛熱烈，大獲成功。本會主席霍沛德於席上祝酒，希望今後年年舉行春茗，歡渡佳節。本人謹感謝各會員商行之支持及協助。本會並已與美國商會聯合舉辦二次午餐會，邀請美國著名經濟學家作專題演講，極為成功。

貿易方面，本會近數月來十分繁忙，積極籌組海外貿易團。非洲貿易分區委員會及南亞太貿易分區委員會合作策劃，準備邀請會員商行，於四五月間赴南非及澳洲訪問。阿拉伯貿易分區委員會亦正計劃於四月組團訪問埃及與蘇丹。中南美洲貿易分區委員會已決定於下半年組團訪問巴拿馬城、加拉加斯、聖保羅及馬瑙斯等。日台韓貿易分區委員會正計劃五月南韓之行。

工業事務方面，本會已與貿易發展局及工商署合作，籌組促進工業投資訪問團，由本人率領，於四月初前往澳洲雪梨、墨爾本、坎培拉等地。希望至少會晤三十間澳洲工

業公司董事會，並舉辦座談會及演講會等接觸更多工業界人士。本會馮若婷女士及工商署貿易主任李友石已先行赴澳，作兩週訪問，進行必要之準備。此外，訪問美國及日本之籌備工作亦已開始。工業促進協調委員會主席鍾信亦已同意一項有關計劃。本會積極促進外國工業來港投資之努力，獲得各會員商行、各領事館及商務專署、各大銀行及其他商行之巨大鼓勵及協助。

龍年已有良好之開端，應盡力爭取良好之結果。

最後，本人願藉此為香港協會作義務宣傳。該會設於倫敦，代表香港利益報導實情及加強聯絡，在許多對本港關係重大之問題上（並非只是死刑）！對英國輿論尤其是國會輿論施加影響。許多曾在港居住之知名人士參加該會各委員會。該會在香港設有分會，羅理基爵士任分會委員會主席，本人任義務秘書。分會職責為維持協會在英國活動之經費，會員費每年個人會員二百元，公司會員四百元。協會目前徵求更多會員，有意加入者請撥電五・二三七六五〇與本人聯絡。

香港工商業組織研討

百餘組織 名目繁多

香港共有一百七十多個工商業協會組織。大部份規模甚小，會員商行不滿一百。有些協會也許有名無實，或者祇屬會所性質。有些組織却規模較大，活動頻繁，頗具影響，會員商行往往數以千計。

此種商會之功能職責，大都可以顧名思義，例如米商聯合會、蔬菜業商會等等。有

些商會代表特定之地區，例如大埔商會、筲箕灣商會等等；或者代表特定之國度，例如美國商會，印度商會等等。還有少數組織，其名稱並不表達任何特定含義，例如香港總商會。

香港工商業形式各式各樣，僅有一百七十多個代表組織，較之於本港工商企業及就業人口之龐大數目，實在並不算多。與其他工業國家，擁有此種商會遠遠多於本港

香港人口相似之。然而，究竟何一機構負責何種工作，時會令人感到困惑，實亦情有可原。表面看來，不同機構之職責，重複之處甚多，尤以較大組織為然，例如本會與中華廠商會；又如香港工業總會、生產力促進中心、科學管理協會及貿易發展局等政府資助機構。

宗旨職責 各有分工

研讀各種組織之章程條例，對於澄清此種惑亂並無裨益。例如，香港工業總會一九六〇年條例中規定有下列宗旨：「促進其他國家對本港工業之認識及重視，贊助及協助組織貿易及貿易團。」此條豈不亦正是貿易發展局之職責？另一條文關於「促進及提倡教育，提高經理及管理人員之水準」，亦正是生產力促進中心及科學管理協會之業務。

其他事例有：工業總會及中華廠商會均贊助香港產品設計比賽獎，本會與貿易發展局均有貿易諮詢服務，科學管理協會與生產力促進中心所設部份課程亦幾乎並無二致。

但事實却並非如此。不同組織經由各種途徑定期保持有效聯絡，儘量避免職責相互重複。因此，貿易發展局於一九六六年成立後，工業總會就不再從事海外貿易促進活動，將有關責任交由前者承擔。在海外貿易促進工作方面，本會與貿易發展局看來確實仍有重複之處；但兩者雖然均派遣貿易團赴海外訪問，但目的及性質却頗不相同。貿易發展局訪問團大都旨在推銷本港產品，而本會訪問團却往往純屬考察性質。而且兩者不時組織聯合訪問團。科學管理協會及生產力促進中心雖然開設同類課程，但性質及內容却全然不同。

相互協調 定期連絡

無可否認，職責重複時有發生，但經已竭力阻止在最小程度。實行各組織間之協調及分工，採用多種方式。其中最顯著之方法是經由相應之理事會或行政委員會進行。許

多工商界人士同時參加數個委員會。以本會理事會為例，其中九位理事參加科學管理協會理事會，七位理事參加貿易發展局理事會，二位參加生產力促進局，四位參加工業總會理事會，二位參加付貨人委員會。

各組織職員間亦保持經常接觸，處理日常業務中相互有關之工作。

在某些特別場合，政府組成專門委員會實行協調。最佳例證為簽證協調委員會，政府及五個非政府簽證機構定期開會，商討簽證事宜。貿易程序簡化工作，工業投資促進活動（經由新近成立之工業投資協調委員會），以及香港時裝節及香港玩具及禮品展覽會之籌組工作，亦均實行此種官方協調。

或分或合 擇需而定

在許多情況下，若干組織對某一相互關心之問題，採取共同立場，因而聯合組成特別委員會。過去曾協調之問題，範圍極廣，從官地租金直至水費。近來則有郵政局建議案。各組織採取聯合立場，向政府呈提要求，會獲致詳細考慮。工商組織藉此方式，對香港之治理，發揮重要之諮詢作用。

在相反情況下，各組織雖然極少嚴重不和，但却很難或不宜採取共同立場。任何會員組織必須考慮本組織大多數會員商行之意見。正因為此，最近三個組織——本會、中華廠商會及工業總會分別就紡織品限額制度，向港府呈交報告書。此三份報告書根據之事實大致相同，但所提出之某些建議却迥然不同，足以反映此三個組織所代表之不同會員商行。

各工商組織首腦，每月首次週三舉行午餐例會，會晤商談相互關心之各種事務。

統一組織 孰利孰弊

各方面會一再建議，成立一「香港工商業協會聯合總會」統一進行各組織間之連絡及協調。此一聯合總會，究竟卓有實效，抑或弊多於利，尙無定論。

生產力促進中心執行幹事廖偉韜先生認為並不需要此一組織。「各組織執行委員會定期舉行會議，注意力求避免職責相互重複」。此外，協調相互活動終有限度。例如，包裝及技術訓練就無法協調。

「如聯合總會發號施令，亂加規定，結果會限止太多，非常不便。任何組織必須富於彈性，能隨時根據環境變化而改變其工作。」中華廠商會秘書長李澤培亦認為，各組織間之現有協調已行之有效。香港之工商組織，亦並非太多。

「本人認為香港應有更多協會組織代表工商各界。如此方才更民主，亦更具代表性。涉及各行各業之範圍亦能更廣泛。香港畢竟有二萬間左右工廠，但其中究竟有多少歸屬某一組織？大工廠當然均有歸屬，但數以千計之小廠甚或中等工廠仍然孤軍作戰，各行其是，並無任何代表組織。」

「組織增多並不一定意味減少合作或增加混亂。諸如簽證及簡化貿易程序等方面，合作業已卓有成效，如有需要，可以擴展至其他方面。」但李澤培強調指出，各組織合作時應該保持各自之相對獨立。

授課計劃 各有側重

香港科學管理協會洪煥先生解釋，該協會與生產力促進中心及理工學院等機構協調授課計劃。

「生產力促進中心所開設之課程着重於工業，而本協會課程則較為着重於商業。本協會與生產力促進中心及工業總會之間，經常不斷交換情況及消息。」

「本協會如舉辦非洲或阿拉伯國家市場拓展研討會，定必邀請貿易發展局代表及熟悉該地區之商人出席演講。」

「理所當然，本港不祇一個組織提供商業及技術課程。公共機構及私人組織均開設此類課程。許多公司往往派員進修不同組織提供之多種課程，可以藉此比較選擇。只要需求仍殷，幾個組織提供相同課程，有何不

可？」

特種服務 專門負責

然而，在有些方面，由一個組織負責提供某一特定服務，可能較為妥善。如工業總會提供之檢定服務即其一例。

工業總會聯席總幹事伊士美解釋：「檢定工作必須遵循國際標準進行，因此亦必須由完全合格之人員負責。如有許多組織進行檢定工作，勢必影響香港在海外之信譽。」

伊士美同意，各組織為求工作卓有成效，必須隨機應變。

「貿易發展局成立之前，工業總會與香港總商會密切合作，組織海外貿易促進活動。貿易發展局成立後就與工業總會之業務有所重複。經過研究後，對雙方之職責有更明確之分工。如今，貿易發展局從事海外貿易促進活動，工業總會則負責本港工業促進活動。」伊士美舉此事例，說明各組織必須根據香港工商業發展之形勢，經常調整各自之業務。

本港獨有 厥功甚偉

五十年代期間，香港只有兩大貿易或工業組織，代表本港工商業。一個是香港總商會，成立於開埠初期，已有近一百年悠久歷史。另一個是中華廠商聯合會，由香港早期工業家於三十年代創辦。

工業總會、貿易發展局、生產力促進局與促進中心、出口商會、出口信用保險局、科學管理協會、工業製品設計促進委員會及付貨人委員會，均成立於六十年代。每個組織之成立，均是香港經濟發展之成果。

世界大多數國家之經濟，不同程度均由國家經營。香港之經濟則不然，是由各工商業協會組織扮演重要諮詢角色，成為政府與工商界之橋樑。香港此種工商業組織制度，當今世界可謂獨一無二，毫無疑問將繼續大力促進工業、商業及經濟之發展，為香港帶來繁榮。

香港玩具及禮品展覽會簡評

首次展覽 旗開得勝

一九七三年底，香港出口商會一小部份會員商行，提出由本港舉辦一次玩具及禮品展覽會之想法，當時之普遍反應是猶豫不決，甚至漠不關心。一九七五年十月十一日中午十二時，香港首屆玩具及禮品展覽會得以開幕，大都應歸功於一位商界鉅子——英商高怡洋行董事長包偉能先生——之積極支持及努力組織。

包偉能先生於去年玩具展覽會之前，已在本港工商界素負盛名，但如今又以「玩具展覽專家」享譽本港及海外。

去年玩具展覽會之幕後策劃人雖是包偉能，但此種大規模國際展覽會決非單槍匹馬所能籌備。大量具體工作均由籌組委員會進行，該委員會由商業組織及玩具廠商委派代表組成。

再次展覽 今秋舉行

首次展覽大獲成功，以包偉能為主席之籌組委員會備受鼓舞，目前正計劃籌備一九七六年玩具及禮品展覽會。日期及地點與去年相同——十月十一至十三日於香港會議中心舉行。

製造商及出口商經已紛紛預定攤位，凡香港總商會會員商行，如欲預定攤位，請向九龍星光行六二二室香港出口商會一九七六年玩具及禮品展覽會秘書白莉安太太申請。

包偉能透露：「去年展覽會共有近三千位買家，今年預料將大為增多。海外買家來自本港主要玩具市場，尤以美國、歐洲及日本為數最多。」

儘早預定 設計攤位

去年參展廠商大都認為玩具展覽會極有價值，大獲成功；預料今年對攤位之需求將

會大增。而且籌組委員會竭力避免展覽會會場過份擁擠，故將攤位總數限於一百六十個。包偉能表示：「本人希望本港出口商及製造商，儘早預定攤位，且預定二個標準攤位，以便每間廠商之攤位可搭建成獨立單位，又可與買家當場洽商成交。」

「去年遇到之難題之一，是參展廠商不願展出其最佳最新產品，此種問題經常發生，亦可以理解。但解決方法亦很簡單：每間廠商各自搭建獨立攤位，使買家可以一目了然。」

「去年某些參展廠商建議八呎乘十二呎攤位最為理想，今年開始實行此一改革。」

包偉能證實數間參展廠商經已採用此種理想呎度攤位。

籌組委員會已為今年展覽會增加場地。除榮華廳外，且租用會議中心地下近停車場處空地。同時已與怡東酒店洽妥，參展廠商可租房用作臨時私人辦公室。

八呎乘八呎標準攤位租金為三千八百元。包括地毯、照明燈及電力。基本攤位將由獲准承造商興建；但歡迎參展廠商自行搭建攤位，唯須符合籌組委員會及會議中心之一般規定。

海外宣傳 大張旗鼓

海外宣傳運動經已開始，大張旗鼓，爭取買家來港赴會。貿易發展局主理其事，香港總商會等組織給予協助，海外宣傳小組委員會則給予指導。貿易發展局各海外辦事處業已與美國、歐洲及其他地區之主要買家接觸，遊說其派遣代表參加香港玩具展覽會。

包偉能指出：「今年本港玩具展覽會特意選在九月東京玩具展覽會及十月廣州市交易會之間舉行。因此大批海外買家屆時將雲集香港及遠東地區。」

Director's Viewpoint Pleasure Before Work

THE Chamber's first (as far as I can determine) Chinese Spring Dinner was held at the Metropole Restaurant on Thursday, 12th February. It was, I believe, a successful first effort and member companies took up nearly sixty tables. Entertainment was varied; the food, service and decor were all of a high standard and Peter Foxon decreed that there should be no speeches. In proposing the toast, he suggested that this function should be made an annual affair. With the support of members we shall make it so. A word of thanks is due to all the firms which contributed in one way or another to the evening's pleasure.

We have also organised jointly with Amcham (why can't we be Gencham?) two very successful lunches to hear influential American economists tell us what we wanted to hear — it's go, go, go, folks! We were upstaged by Herb Minich at the first one when the entire wall was devoted to the Amcham logo and name. However, this was probably not deliberate, since we were amused to find at the second luncheon in the series, that the hotel management had this time given entire credit to the General Chamber.

Turning to more mundane matters, the Chamber has been very busy during the past month with work preparatory to several overseas promotions on both sides of the house, trade and industry. The Africa Area Committee and the South Asia/Pacific Area Committee worked together to produce detailed plans for the proposed Business Group to South

Africa and Australia in April/May. Members have by now received a circular inviting them to participate. The Arab Area Committee is also planning a business visit to Egypt and the Sudan for April. The Central and South American Committee has decided to organise a business mission to Panama City, Caracas, Sao Paulo and Manaus (and possibly Mexico City) later in the year whilst the Japan, Taiwan and Korea Committee is working on a mission to South Korea in May.

On the industrial side, we have worked closely with the TDC and DCI in planning our forthcoming mission to Australia which I shall have the pleasure of leading to Sydney, Melbourne, Canberra and possibly Adelaide in early April. We hope to see at least thirty Australian industrial companies at boardroom level and a good many more by way of group discussion, speeches and so on. Cecilia Fung and Michael Lee, Trade Officer in the DCI will carry out the essential pre-mission work in an earlier visit within the next two weeks.

Planning has begun for the next missions to the US and Japan and a programme for these agreed by Derek Jones' Industrial Promotion Coordinating Committee. I am sure I don't have to stress the amount of detailed work involved in each of these promotions and we in the Chamber executive receive a tremendous amount of encouragement and help not only from our own

cont'd. Pg. 27

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The Associations — Conflict or Cooperation?

THERE are more than 170 trade and industrial associations in Hong Kong. They are mostly small, with a membership of less than 100. Some of them, one suspects, exist in little more than name, or else function mainly as social clubs for their members. Some are larger, more active and more influential, with a membership running into the thousands.

In most cases the function of the association is made fairly explicit by its title, for example the Rice Retailers Association, the Gunny Bags Merchants Association, and so on. The Association might represent a particular district — the Taipo Chamber of Commerce, Shauiwan Chamber of Commerce — or else a particular national grouping or interest — the American Chamber of Commerce, the Indian Chamber of Commerce, etc. In a few cases, the name of the association fails to convey anything in particular. The *General* Chamber of Commerce, for example must be one of the most vague-sounding of all titles! — General who? — General what?

In fact 170 or so associations to represent the multifarious interests of Hong Kong industry and trade is really quite a small number when one considers the large number of established commercial and industrial enterprises, the size of the working population and the fact that other industrialised countries of a similar population have far more such associations. Nevertheless, the casual observer might be forgiven for some-

times being a trifle bewildered as to exactly which institution is responsible for which area of work. This is especially true in the case of some of the larger associations, like the Chamber and the CMA, and the Government-subsidised organisations, such as the Federation of Hong Kong Industries, the Productivity Council and Centre, the Management Association and the TDC.

The confusion would hardly be cleared up if the casual observer were to study the articles of association, terms of reference, etc. of the various associations. For example, in the objects of the Federation of HK industries, as set out in its Ordinance in 1960, we find the following paragraph: 'To promote, in other territories, knowledge of and respect for the Colony's industries and to sponsor and assist in the organisation of trade and trade missions.' Isn't this fairly precisely what the Trade Development Council does?

Other instances could be cited: both the Federation of HK Industries and the CMA sponsor a Hong Kong Design Award, both the Chamber and the Trade Development Council provide a trade statistics service, and some of the courses run by the Management Association seem almost identical to those of the Productivity Centre.

But as with many phenomena, the truth is somewhat different. In practice the different associations maintain regular and effective liaison through various channels. Care is taken to avoid the overlapping of responsi-

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lities or the duplication of effort. Thus the Federation no longer carries out trade promotion overseas, having relinquished those duties to the TDC when the latter body was established in 1966. Admittedly there might still appear to be some duplication in this respect between the Chamber and the TDC, but where the two organisations are both sending business groups to a particular area one will generally find that the nature of the groups is rather different—the TDC group might be a ‘hard-sell’ mission, while the Chamber one might be purely exploratory. And of course, quite often joint promotions are organized. Both the Management Association and the Productivity Centre might be offering courses in, say, Supervisory Training, but the content and nature of the courses are likely to be quite different and even if they are not, both courses are usually fully attended.

Division of labour

This is not to deny that duplication does sometimes occur, but conscious efforts are made to keep it to a minimum. Coordination and division of work between the associations is carried out in a number of ways. The most obvious of these is through their respective Councils or Executive Committees. This is facilitated by the fact that many businessmen sit on these Committees. Take the Chamber’s Council for example—nine members sit on the Council of the Management Association, seven are on the Trade Development Council, two on the Productivity Council, four on the General Committee of the

Federation of HK Industries and two on the Shippers Council.

There is also official coordination in certain specific areas through specialised committees. A good example of this occurs in the field of certification, where the Government and the five approved non-Government issuing bodies meet regularly on the Certification Coordination Committee. The same coordination occurs in the fields of trade facilitation and industrial investment promotion (through the recently established Industrial Investment Coordination Committee) and in the organisation of the Ready-to-Wear Festival and the Toy and Gift Fair.

On many occasions the associations have taken a joint stand on a particular issue of mutual concern and joint Ad-hoc committees have been established. This happened fairly recently, for example, over the proposed Post Office Bill. When such a joint stand is taken in making a representation to the Government, it is certain that it will be most carefully examined.

On the other hand, there are occasions when it would be very difficult or not desirable for the associations to take a common stand—though really strong disagreements are extremely rare. Any membership organisation must consider the opinions of the majority of its members. (If it ceases to do so, it will rapidly find itself losing members). Thus recently three organisations—the Chamber, the CMA and the Federation—submitted separate reports to Government on the textile quota system. While

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these reports covered much the same ground, some of the recommendations differed quite radically, reflecting the different membership composition of these associations.

A further form of liaison between the associations is through the monthly 'First Wednesday luncheons' where the heads of the associations meet to discuss various matters of mutual interest.

A suggestion which has been made from time to time is that some kind of 'Confederation of Hong Kong Trade and Industrial Associations' might be established to officially carry out coordination and liaison between the various bodies. Would such a confederation really serve any useful purpose, or would it be more of a hindrance than a benefit?

Duplication avoided

The Executive Director of the Productivity Centre, Mr. W. H. Newton, does not believe such an organisation is needed. 'The Executive Committees of the various associations hold regular meetings and they are mindful of the need to avoid duplication. Besides, there is a limit to coordination of activities. For example, you can't coordinate packaging with technical training.

'If a confederation or committee were to say 'You must not do this or that' the result would be very restrictive and inconvenient.'

The Secretary General of the Chinese Manufacturers Association, Mr. J. P. Lee, also believes that existing coordination between the associations is effective. Neither does he

think there are too many associations in Hong Kong.

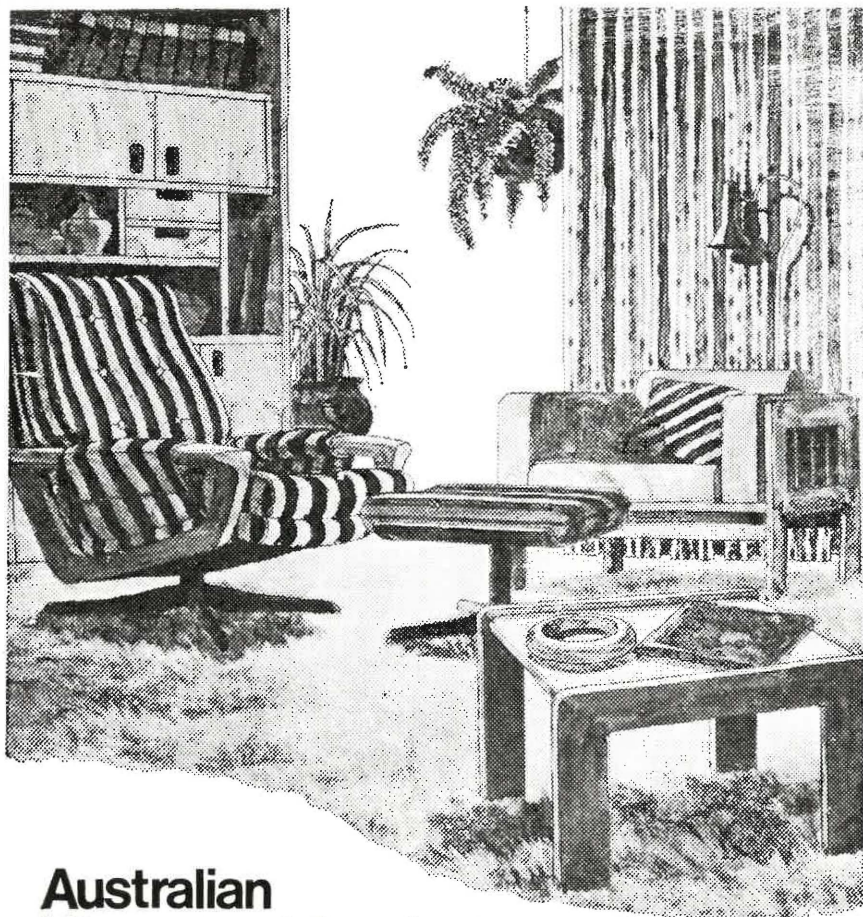
'I think there should be more associations representing trade and industry in Hong Kong, not fewer. This would be more democratic and more representative. It would provide a greater range and more diversity. After all, in Hong Kong there are some 20,000 factories. But how many of these belong to any kind of association? Of course, the large ones do, but there are thousands of small and even medium-sized factories just floating around without any kind of representation.

'More associations would not have to mean less cooperation or more confusion. Cooperation already works well in fields like certification and trade facilitation and this could, if necessary, be extended to other areas.' However, he stressed, while working together the associations must retain their separate identities.

Mr. John Hung of the Hong Kong Management Association explained how they coordinated their programme of courses with other institutions, such as the Productivity Centre and the Polytechnic.

'The courses offered by the Productivity Centre are industrially oriented, whereas ours are more oriented towards commerce. There is a constant flow of information between ourselves and the other organisations, particularly the Productivity Centre and the Federation of HK Industries.

'If we are holding a seminar on marketing in Africa or the Arab



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countries we invite a representative from the TDC to sit on the panel, together with businessmen who are familiar with the area.

'You will find that a company will subscribe to a variety of courses offered by different bodies, because people like a choice. And so long as the demand is sufficient I see no reason why several organisations should not offer the same course.'

However, there are areas where it is probably better that one organisation should be responsible for providing a particular service. An example of this is the testing service provided by the Federation of HK Industries.

'Testing must be carried out according to international standards', explained the Joint Director of the Federation, Mr. A. Ismail. 'And it must be done by fully qualified people. If too many organisations did testing, I think it might affect Hong Kong's credibility overseas.'

But Mr. Ismail agreed that flexibility was essential if the various associations were to continue to work effectively.

'Before the establishment of the TDC, the Federation worked closely with the Chamber in organising trade promotion overseas. Subsequently there was a bit of overlapping between the TDC and ourselves. This was a duplication of effort. But the problem was studied and our respective roles were more clearly defined. Now the TDC does external promotion while the Federation is responsible for local industrial promotion, despite the fact that overseas promo-

tion is written into our terms of reference.'

Mr. Ismail cited this as an example of the way in which the work of the associations must constantly be adapted in the face of HK's industrial and commercial development.

In the 1950s there were only two major trade or industrial associations representing the interests of commerce and industry in Hong Kong. They were the General Chamber of Commerce, which had already been in existence for nearly 100 years, and the Chinese Manufacturers Association, set up in the 1930s by some of HK's earliest industrialists. The Federation of HK Industries, the Trade Development Council, the Productivity Council and Centre, the Exporters Association, the Export Credit Insurance Corporation, the Management Association, the Industrial Design Council, the Packaging Council and the Shippers Council were all established during the 1960s. In each case their establishment was the result of the development of HK's economy.

Most economies are to varying degrees state-run. The Hong Kong economy is not, but the trade and industrial associations play an important advisory role and provide a link between the Government and the business community. As operated in Hong Kong, the institutional system is unique and there is no doubt that it will continue to promote commercial industrial and economic development vigorously and to the advantage of the community.

Toytown 1976

WHEN, towards the end of 1973, a small group of people mainly associated with the HK Exporters Association conceived the idea of mounting a toy and giftware exhibition, the general reaction was one of hesitancy — even perhaps indifference. The fact that at 12.00 noon on 11th October 1975, HK's first Toy and Gift Fair opened its doors to a host of buyers is largely a tribute to the enthusiasm and energy of one man.

Bill Blaauw, managing director of John Cowie, was well enough known in HK commercial circles before last year's Toy Fair. But now he is firmly established both here and overseas as 'Mr Toyfair'.

Although Bill Blaauw was the driving force behind last year's show, an international exhibition of this size cannot of course rely entirely on the efforts of a single individual. Much detailed work was done by the organising committee which included representatives of both local associations and companies within the toy trade itself.

Encouraged by the undoubted success of last year's exhibition, the same committee, under Mr Blaauw's chairmanship, is now deep into arrangements for the 1976 fair. This will go on at the same time as last year — October 11-13 to be precise — and at the same venue, the HK Convention Centre.

Manufacturers and exporters are already in the queue to register for stands, and Chamber member companies wishing to take space are

invited to apply to Mrs. Dorothy Balean, Secretary to the 1976 Toy & Gift Fair, c/o HK Exporters Association, 622 Star House, Kowloon.

'We had almost 3,000 buyers at the last fair, and this time we are expecting many more. Buyers attended from all our main toy markets, and principally from the USA, Europe and Japan,' Mr Blaauw reports.

A large majority of those exhibiting last year thought the event was well worth the effort, and in view of this success, demand for space is expected to be heavy this year, especially as the Committee is anxious to avoid too crowded a display area, and booths will be limited to a total of 160.

'My advice to local traders and manufacturers is simple,' says Mr Blaauw. 'Book early and book two of the standard booths, especially if you wish to construct a private area where you can talk serious business with your buyers.'

'One of the problems we encountered last year was that exhibitors were reluctant to display some of their best and newer lines. This is understandable and is always a problem. But the answer is really quite easy. Construct your stand so that you have a private area for the valued buyers,' Mr. Blaauw suggests.

'Anyone taking a double booth will be able to construct an 8 feet by 12 feet stand, which was a size that some of our exhibitors last year suggested to be an ideal size. Several exhibitors are already following a double space policy.'

The organising committee has increased the space available for this year's show. In addition to the Oriental Room, space will be hired near the Car Park area on the ground floor of the Convention Centre. And arrangements have been made with the Excelsior Hotel to allow exhibitors who wish to do so to book rooms in the hotel to act as private offices.

The cost of a standard 8 feet by 8 feet booth is \$3,800. This includes carpeting, basic lighting and electrical power. Basic booths will be constructed by the approved contractors, but of course exhibitors desiring to construct their own stands will be welcome to do so, provided these meet the overall conditions of the organising committee and the Convention Centre.

Bringing buyers here

An extensive overseas publicity campaign to bring buyers to HK is now underway. The TDC is carrying this out with the assistance of organisations such as the Chamber, and under the guidance of an Overseas Publicity Sub-Committee. TDC overseas offices are already in touch with leading buying organisations in the US, Europe and elsewhere, persuading them to send representatives to the show.

'The exhibition dates have been deliberately chosen to fit in between the Tokyo Toy Fair in September and the Canton Fair in October,' Mr Blaauw says. 'You can be sure therefore that there will be a large number

of buyers in HK and throughout the region at that time.'

'A special feature of this year's show will be the availability of premium positions for exhibitors near the entrance to the fair. These will cost more, of course, and we are encouraging exhibitors to develop a particular theme for these booths, such as Lilliput, or a castle, the old woman in a shoe, or any similar fairy tale theme.'

Potential items for exhibition include the full range of toys and games, and giftware items such as decorative giftware, novelty items, and advertising premium material.

The exhibition is open to exporters, manufacturers and a restricted number of service companies such as banks and shipping companies.

'The sceptics last year thought we couldn't do it,' says Mr Blaauw. 'We've proved we can. It was a first effort, sure, but now we can go on to better things. Believe it or not we even made a surplus last year, and this will be used to underwrite the cost of this year's show.'

'This year's exhibition will in some ways be crucial,' he adds. 'Many buyers would have looked upon the first show as a trial run. Now that they see we're serious, they'll come back. This second show will therefore go a long way towards fixing the HK Toy and Gift Fair as a permanent event in the buyer's annual calendar.'

'After all, it would be a bit ridiculous if the world's largest toy exporter didn't have its own major international exhibition, wouldn't it?'

Picture Briefing

- A. The Colonial Secretary, Sir Denys Roberts, was the Guest of Honour at the Chamber's second Annual Dinner held on January 14th. In his speech Sir Denys talked about Hong Kong's relationship with the United Kingdom. (l-r) Mr. D. J. C. Jones, Secretary for Economic Services; The Chairman, Mr. Peter Foxon; Sir Denys; The Vice Chairman, Mr. Leslie Gordon; and Mr. D. H. Jordan, Director of Commerce and Industry.
- B. The Chamber's Industrial Development Fund was officially inaugurated at a luncheon on January 26th. The Chairman thanked the donors for their valuable support and reviewed the Chamber's plans for industrial investment promotion this year.
- C. The Chairman presented Duke of Edinburgh Silver Awards to over 100 young people at a ceremony held at the Mariners' Club on January 16th.
- D. The Hong Kong Commissioner in London, Mr. S. T. Kidd, visited the Chamber on January 27th and met members of the General Committee. Mr. Kidd (2nd from right) is pictured with (l-r): Mr. Harry Paul, Sir Lawrence Kadoorie, Mr. Leslie Gordon and Mr. Nigel Rigg.
- E. Ten 'Good Citizens' received Good Citizen Awards at a presentation held at the Chamber on January 23rd. The Chairman presented the awards.



Speaker's Corner

Bill Bailey on Censorship

TF the crime rate has been adversely influenced by some forms of communication media, it almost certainly isn't TV features or films. It's more likely to be things like newsreels and the afternoon newspapers, together with the accepted conventions of HK society, which include admiration for violence. I feel a little bit restless when I see people condemning films and TV, when I know that in fact the same people admire violence.'

S.F. 'Bill' Bailey, although well enough known for his work with the University Grants Committee, is for many people HK's 'Mr. Arts'. In particular, his fight to see the establishment and construction of an Arts Centre in a society that is often described as the ultimate in philistine materialism can be seen, one might say, almost as a parallel to the efforts Noah devoted to the construction of his ark. But despite indifference or outright hostility, events proved Noah right; and the fact that the Arts Centre is now at a relatively advanced stage of construction gives the lie to those who claim HK is indifferent to creative and imaginative endeavour.

Bill Bailey is not only an administrator of the arts however. He has been chairman of Studio One, the film appreciation society, and of Garrison Players, and he still works on the creative side of theatre. He has up his sleeve for the near future a production of a play which, although an accepted classic, could, he fears, be taken personally by some sectors of HK society. He thus has

reason to take a personal interest in the workings of HK's censors. This interest covers not only the official actions of the Television and Films Authority, but also the pronouncements of entirely unofficial self-appointed guardians of public taste and morals.

At this time, when HK's fourth Arts Festival is successfully under way, it seemed appropriate therefore to invite Mr. Bailey to give a different view of the case advanced by Mr. Ian Kingsley of the TV and Films Authority, as reported in *The Bulletin* for October 1975.

Bill Bailey is interested in censorship in all its aspects, including political censorship, although it is artistic censorship that touches him most closely. Censorship, he says, covers a complex field of human activities.

'There's a long spectrum of things from purely criminal actions at one end, and, at the other end, simple suppression of ideas you don't happen to like. I'm primarily interested in censorship in the obvious sense, that is to say, official censorship of plays, films, of the written word and the visual arts. And—although it must sound a bit odd—of music since at various times people have argued that music was disgusting, obscene, or outrageous.'

He goes on to add that censorship in an official sense cannot be separated from the wider social context in which it operates. Often this becomes apparent not only in official acts of suppression, but in the attitude

of individuals towards particular forms of communication, both in the arts and in the mass media.

'In the arts generally people get worked up — and rightly so, as it's the function of an art to arouse enthusiasm and interest and understanding. But if you don't want to understand, you get very annoyed when someone wants to make you understand.'

Audience reaction

He repeats a story related by Anthony Chardet, artistic director of the Arts Festival, concerning a recent production of Ibsen's *Enemy of the People* in the UK. 'This is a play that has some very harsh things to say about people like local councillors and corrupt reporters and in particular building contractors. And some people in the audiences reacted very strongly to these remarks. One gentleman even tried to attack one of the actors with his walking stick. This of course is quite irrational. But it's a fact that people do not like to hear opinions that are different from their own.'

'And if you've got censorship, if you've taken over a system, as we have in HK, one might as well recognise that it's going to be irrational. This is partly because it's trying to cater for people with likes or dislikes who are themselves partly irrational.'

'Violence that I personally find offensive is entirely accepted in HK. This is the violence that you get in films, the mindless repetition of kung-fu fights, of sword fights, of children's

comics that are really quite revolting. But the community accepts that. It doesn't want to censor that.'

'I doubt whether anyone has yet made out a case for any art form literally being dangerous. What happens is that it's felt to be objectionable—which isn't the same thing.'

The Bulletin pointed out that many would dispute this claim, and insist that art could indeed be dangerous. Although the evidence is incomplete and inconclusive, was it not reasonable to believe that the models set by television—probably the most prevalent if not necessarily the most persuasive of communicators—had contributed to a change in standards? Was it irrational to believe that a casual link exists between violence on the screen and crime in the streets?

'Well, there's no censorship of newsreels, which probably do harm, with constant reiteration of dead bodies all over the place. All the newspapers do this. They show photographs of criminals if they can, and they show photographs of bodies if they can. No-one censors that.'

'TV is churning stuff out morning, noon and night—nearly always without any thought, (and, by definition with any art form, you do some thinking about it). I suspect you'll find the harm is being done by newsreels and sometimes advertisements, and not by the feature sections.'

'HK is a place that tends to live on a peculiar mixture of myth and gossip and teahouse chat and cocktail party chat. One gets things bandied around

as facts that never have been facts. People say "ah, yes, we know about that." In fact, they don't know about it. The effects of TV and film on the crime rate is one of these topics. If there is an effect, no-one's been able to identify it.'

Switching its stance somewhat, *The Bulletin* asked if perhaps entertainment violence, far from being a cause of real-life violence, might not act in a directly opposite manner, and serve as an outlet for feelings that might otherwise spill over into aggression?

'That's a very difficult one. They do test runs with laboratory controlled samples, and so on. But it cuts both ways. You can find groups that are excited by violence, but not excited into wanting to take action, just excited. On the other hand you get people whose response to excitement is to want to take action.'

The topic popularly supposed to occupy much of the censors' attention is of course sex. Many locally produced films today are more explicit in their treatment of sex than their western counterparts. Was the censors' concern justified?

'Film censorship is of course almost one hundred per cent local, and it is done in terms of local tastes and local feelings. Yet it's almost always the sexy bits and not the violence that is cut out.'

Quite apart from the principles employed by the censors, Bill Bailey has views on the effectiveness of some of their methods.

'It's not only what goes on in the censors' mind, it's what they actually

notice. If they don't notice something, it doesn't get censored. Political censorship has always run foul of the fact that an ingenious man, especially a comedian, can get in many rude remarks which you can't quite pin down.'

'I can quote examples of films that have gone on, where the censor was either dozing, or simply didn't notice or didn't recognise. I know of two films, one following the other. The first one got censored because the censor noticed it, the second one didn't because he didn't.'

'Censors set out to keep off the screen, whether film or TV, scenes or words or suggestions which they think would upset ordinary people.' Basically, of course, they're looking for what they think upsets them. They are constantly staring at their moral navel and deciding that it's the same as everybody else's navel.'

'HK has got four and a quarter million people and there's rather less than a quarter of a million who are well off, but if you look at the panel of censors they're all from that quarter million. They tend to be respectable housewives and retired gentlemen, and inevitably they are a little bit older. But if they don't notice, and the film goes on, everyone is quite happy. There are no riots in the streets, or anything like that.'

If then the censors are unrepresentative of the 'ordinary man', and one allows for the fact that HK's population contains a majority of young people, most of them with different

standards from their parents; might not censorship soon be expected to wither away?

Bill Bailey admits that censorship has in some ways already changed in the recent past. 'In theory, there's a form of censorship in HK on stage plays. In the past you had censorship on stage plays in Britain exercised by the Lord Chamberlain. So when you sent a copy of the script to the HK police, they looked at it to see if the Lord Chamberlain had said it was alright or not. But the Lord Chamberlain's office has now been abolished, so of course he never says anything. So if you send a copy of the script to the HK police today, they usually haven't anything to say about it. The police are not fools and know jolly well what the situation is, but censorship of plays have been quietly allowed to sink down.'

The censor's future

'Censorship will weaken, but I'd be very surprised if it withered away. I wouldn't expect dramatic changes but there will be a slow change.'

'There is a large generation gap here and some of it is not expressed, but suppressed, notably in the family context.'

'On the whole I find those of the student age group set far better standards than their parents. I find it very upsetting—for instance, we run a student finance scheme, and regularly have to prosecute someone for putting in false declarations. In nine cases out of ten, the student is distressed and didn't want the false state-

ment made in the first place. It's the parent who thinks it's clever to get away with it.'

We had diverged somewhat from the question of censorship. Nonetheless, mention of students did lead to another topic—the censorship of dissenting ideas, commonly associated in almost any society with the student population.

'There's surprisingly little political censorship in HK. It's often talked about, but there doesn't seem to be very much. Some of the student population have developed rather mixed political arguments. They're partly straight Maoist arguments, partly a derivation from the world revolutionary arguments that used to be associated with Trotsky. They talk about this, they write, they print, they make little public speeches, some of which are occasionally reported, but no one stops them. They have to get close to inciting people to cause trouble, which verges on the criminal, before anyone will step in and stop them.'

In this respect, HK is a lot freer than many other developing societies. 'It's possible to argue that the society which can afford to be relaxed on this subject, (a) is very rare and (b) by definition is not a tight, centrally controlled, single party state. In the Far East, HK, I think, is outstandingly easy in its censorship. Name anywhere out here that is for instance quite so casual about the printed word. You never see blank spaces in HK papers.'

Well, Was it a Disaster?

The Export League Table for 1975

HAD anyone ventured to predict around July or August last year (our Director did!) that Hong Kong would manage to finish the year with only a marginal drop of 0.2 per cent in its domestic exports it would have been difficult to take him seriously (he wasn't). Hong Kong's domestic exports during the first eight months of the year were running at a level 12 per cent below the same period of 1974.

The upturn came rather late in the day, but the strength of it must have come as a surprise to most people. Exports rose by 18.2 per cent in September, and then by 25.5 per cent in October, 24.6 per cent in November and 32.3 per cent in December. In fact the value of HK's exports in each of these four months was almost double that of the lowest month, February. Even allowing for the fact that the pre-Christmas months are always busy ones for exporters, that is still a very impressive recovery. If Hong Kong can maintain that kind of performance throughout the next 12 months then 1976 promises to be a bumper year indeed. But most exporters and manufacturers would probably agree that that is a big "if".

Despite the overall gloom surrounding our general export performance, the year was not without a few bright spots. Recessions can do strange things to the pattern of exports. On the one hand, some markets which had been showing very strong growth for several years suddenly did an about face, while on the

other hand a few markets actually registered an accelerated growth rate, and these weren't all in the oil-exporting countries.

It was a bad year, for example, for HK's exports to Australia and New Zealand, although in both cases the sudden drop can be explained by the imposition of strict import controls and other protectionist measures. Sales to Australia had been growing strongly at the rate of 73 per cent in 1973 and 69 per cent in 1974, but in the first 11 months of last year they fell by 23 per cent. The value of exports to New Zealand, which had in the previous two years leapt ahead by 59 per cent and 56 per cent respectively, slipped by a whopping 44 per cent. Although Australia still managed to remain our fourth largest market, New Zealand dropped down the ladder from 12th to 21st place.

It was also a bad year so far as HK's sales to most of its Asian neighbours were concerned. *The Bulletin* commented nearly two years ago on the potential for HK's exports which our own Asian/Pacific regional market offers. This is one of the fastest growing economic areas in the world. Nothing has happened in the last two years to fundamentally change this assessment, certainly not the change of government in Vietnam and Cambodia, nor the increase in insurgency in some other South East Asian countries. But like Hong Kong, most Asian countries are heavily dependent on exports. If their exports are badly hit, then they

are forced to buy less. This largely would appear to have been the case last year.

Another important factor influencing the performance of these countries is the Japanese economy, which last year went through a particularly bad period. In the first 11 months of the year our exports to Japan fell by 11 per cent. Those to Taiwan fell by 36 per cent, Singapore by two per cent, Malaysia by one per cent and Indonesia by 37 per cent. Taking Asia as a whole, HK's exports fell by 16.5 per cent last year.

It is not always remembered that these countries are leading markets for our re-exports. In fact in almost every case they purchase more from us in the way of re-exports than they do in direct exports. Our re-exports to Japan, for example are worth more than \$1,000 million per annum, while those to Singapore are valued in excess of \$900 million. If re-exports are considered together with direct exports, then the regional market actually remained quite strong last year.

Expressed in money terms rather than in percentage points, much the largest fall in HK's exports last year was to the United States. The US market's share of HK's total exports has been declining steadily in recent years. In 1969 and 1970 the US accounted for 42 per cent of HK's total exports. By 1974 this had fallen to 32 per cent and the proportion remained about the same last year.

This of course is not necessarily an unwelcome trend, since over-depen-

dence on any one market is risky. Hong Kong's exporters, assisted and encouraged by the TDC, the Chamber and other organisations, have striven with considerable success to diversify HK's export markets, and, in particular, to seek out new markets in developing countries. Nevertheless, the US is still our largest market by far, even if we consider it as a 'region' rather than a single country. Thus a decrease of only five per cent in HK's sales to the USA represented a decline in value terms of \$340 million. This decrease was greater than our total exports to South and Central America. Or put another way, the fall in the value of exports to the US was not offset by the increase in sales to any market, including West Germany, although in percentage terms HK's exports to West Germany increased by more than 15 per cent.

EEC up

While the US share of HK's exports has been steadily diminishing, the same has not been true of the EEC. Sales to the EEC Nine increased by three per cent during the period January to November. Admittedly one country, West Germany, accounted for a large part of this increase, but HK's performance in some of the other EEC countries was quite respectable. Exports to the United Kingdom fell by two per cent which, given the sorry state of the UK economy, is better than might have been expected. However the UK inevitably relinquished its position as HK's second largest market to

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West Germany and does not seem likely to recover the number two spot in the near future.

Sales to the Netherlands, HK's eighth largest market, fell by three per cent, those to France increased by three per cent and purchases by Denmark rose by seven per cent. The gloomy spot in the EEC so far as HK was concerned was Italy, to whom political and economic crisis seem to have become a part of life these days.

Demand in other West European countries appears to have been virtually unaffected by the world recession last year, if HK's performance is anything to go by. The growth in our exports to some of these countries actually accelerated. This was the case for example with Sweden, which in the first 11 months of last year increased purchases from HK by \$82 million, or 24 per cent, compared with a growth rate of 20 per cent in 1974. The same thing was true in Austria where HK's sales increased by 41 per cent compared with a growth rate of 26 per cent in 1974. Switzerland and Norway also remained very strong last year.

Turning to the region where our exports might have been expected to record their strongest growth, overall sales to the Middle East last year were up by 24 per cent. This compares with an increase of exactly 50 per cent in 1974. Clearly it was unreasonable to have placed very high hopes in the oil-rich Arab states, at least in the short term. As *The Bulletin* commented last August, the long term potential of the region is

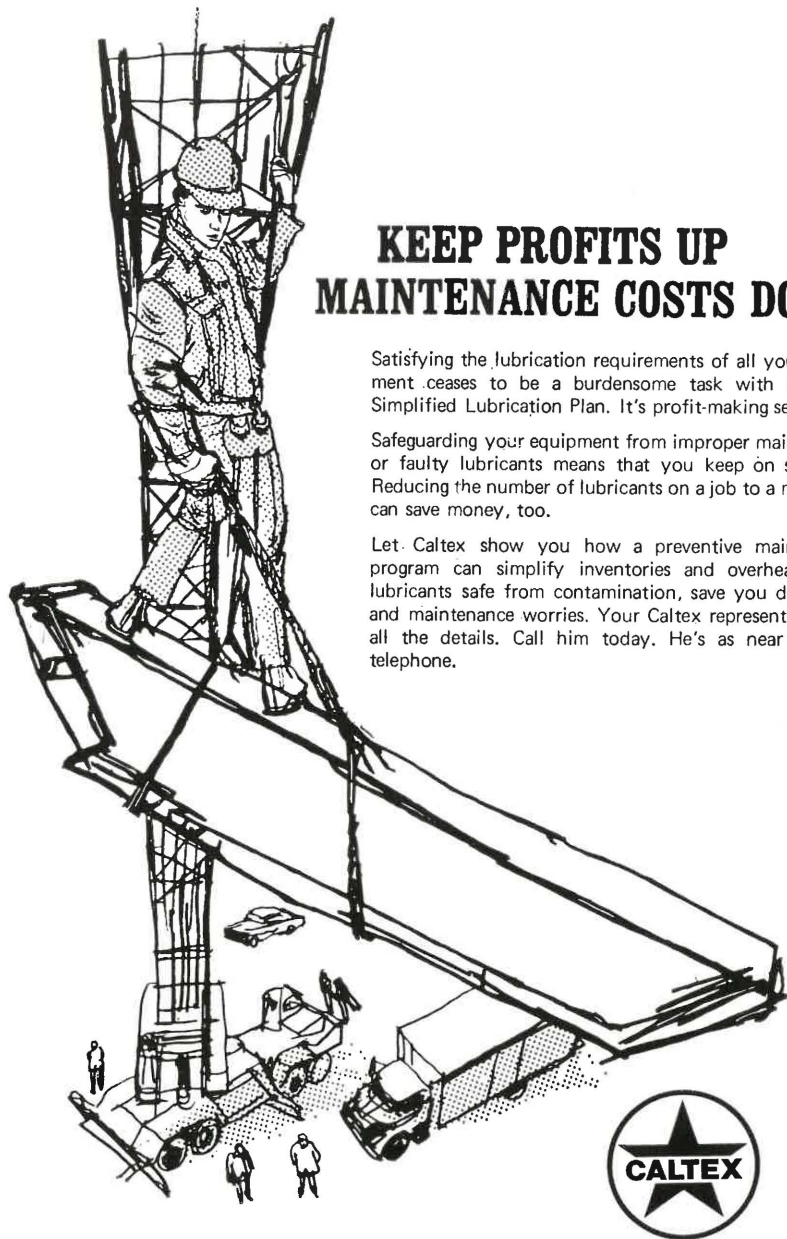
very considerable, but we cannot expect all the growth to come about at once. Despite the massive increases in oil prices two years ago many of the oil producers have failed to accumulate the vast revenue surpluses predicted, largely due to ambitious development plans, coupled with a declining demand for their oil from the industrialised countries.

Our leading markets in the Middle East last year were Libya (exports up by 22 per cent), the United Arab Emirates (up 16 per cent) and Saudi Arabia (up 50 per cent). Libya is now HK's 15th largest market.

Suffered more

Generally speaking HK's exports to developing countries did not fare at all well last year, confirming that these countries have suffered rather more from the recession and increased oil prices than the developed countries. Although sales to Africa increased by 14 per cent, this was entirely due to the phenomenal growth of the Nigerian market, whose purchases from Hong Kong more than doubled both last year and the year before. Nigeria has overtaken South Africa to become HK's largest African market and our 11th largest market overall. Between them Nigeria and South Africa accounted for over a half of HK's total sales to Africa.

It was a poor year for our exports to South and Central America, which declined by ten per cent. Most of these countries have highly protective import policies and one can see little prospect for any real improvement in the situation in the near future, al-



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EXPORTS —continued

though a Chamber mission later this year will be exploring the potential of the Free Trade Zones in the region. HK's leading market in Latin America is Panama, which operates large-scale Free Trade Zones in Colon and Panama City.

HK's exports to Eastern Europe remain at a low level. Sales last year were valued at \$62 million, which is roughly equivalent to our exports to Iran or Spain. However, continued progress was made during the year and HK can be pleased with a growth rate of 30 per cent in this direction. But there is still a long way to go before East Europe catches up with the Middle East, or even Latin America.

The key to our trade growth remains the US and Western Europe. These two markets between them accounted for well over two thirds of our total exports last year. While efforts must continue to explore developing markets and to further diversify our exports, it will be a long time yet before our export pattern assumes a truly diversified pattern.

The Chamber, having listened to a great deal of business advice, examined the statistical and economic analyses available and consulted its crystal ball, predicts that export trade in value terms will be at least 22 per cent higher in the first six months of 1976 than in the same period of 1975. Sticking our collective neck out even further, we predict that the 1976 annual figure will be at least 15 per cent higher than in 1975. Now that places us on record.

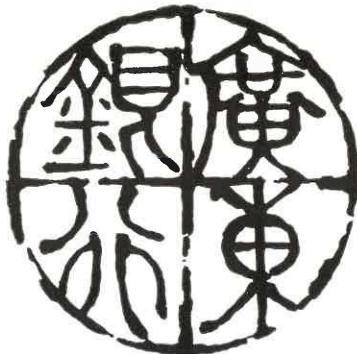
DIRECTOR'S VIEWPOINT —continued

members but from many other agencies, consulates and trade commissions. We are also getting an increasing flow of contacts from banks and other companies as they become aware of our initiatives with industry.

We've made a good start to the Year of the Dragon but we must be judged by the results later on. That seems a fair criterion.

I want to finish this piece with a plug for the Hong Kong Association. As most of you will be aware the Association, based in London, works quietly on Hong Kong's behalf to influence British opinion and particularly British Parliamentary opinion in regard to those issues which are of importance to us (hanging isn't the only one!). The Association is essentially an information and contact organisation and many prominent past residents of Hong Kong serve on its committees and do much that is in our interest. We have a Hong Kong Branch. Sir Albert Rodrigues is the Chairman of the local committee and I am the Hon. Secretary. Our job, among other things, is to ensure that the Association's activities in Britain are financially viable. Our local members pay subscriptions of \$200 per annum for personal membership and \$400 per annum as corporate members. They don't get much back in the way of material benefits; but they know that the Association is working for all of us and for Hong Kong. We need more members and I would be glad to hear from you. My telephone number is 5-237650 and I work Saturday mornings as well!

Jimmy McGregor



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參展商將包括出口商、製造商及限定數目之銀行、船公司等服務機構。包偉能指出：「去年有些懷疑論者認為我們不會成功

。事實證明我們已成功了。而且我們去年還有盈餘，可用以支付今年展覽會之部份費用。」

「就某種意義而言，今年展覽會是關鍵之舉。許多買家將去年展覽會視為一種嘗試。他們今年見我們鄭重其事，再度舉行，自會再來。因為，第二屆展覽有助於使香港玩具及禮品展覽會成為一年一度之固定活動，載入玩具買家之日程；正如香港時裝節之於服裝買家然。」

「香港作為世界最大玩具出口地區，而沒有自己之國際展覽會，豈不有些可笑？」

香港檢查制度縱橫談

本會「會刊」一九七五年十月號曾刊載專文，報導港府電影電視管理局署理專員乾仕禮先生對檢查制度的觀點。值此第四屆香港藝術節成功進行之際，本刊特邀香港藝術中心主席白懿禮先生，從另一角度對此問題再作評論。

文化沙漠中的諾亞方舟

「如果犯罪率因受大眾傳播媒介的影響而有所增加，幾乎可以肯定不是電視節目或電影，而更可能是新聞短片及晚報之類，以及本港社會的傳統習俗，其中包括欣賞暴力。電影電視的譴責人，其實往往亦正是暴力的欣賞者，本人知悉此種情形頗感不安。」

白懿禮先生在大學教育資助委員會工作，本已素孚盛名；但對廣大市民而言，更以香港藝術中心主席而聲望卓著。他在物質至上的文化沙漠中，為建立藝術中心而努力奮鬥；將之比作諾亞建造方舟，並非太過。如今，藝術中心大廈的興建工程正在順利施工，足以證明香港並非對藝術創作活動漠不關心。

然而，白懿禮不僅是藝術活動的行政管

理人員；他亦是電影欣賞協會「第一影室」以及另一業餘藝術團體的主席，且仍然從事戲劇創作活動。他正策劃在最近的將來製作一個古典劇，預料本港某些階層會有所反應。因此他對香港文藝檢查制度極有興趣。此種興趣不僅包括港府電影電視管理局的官方檢查，而且涉及趣味及道義的純粹非官方剖析。

官方檢查及公眾好惡

白懿禮對各種方面的檢查制度均感興趣，包括政治檢查，當然對他關係最密切的還是藝術檢查。他指出，檢查制度涉及人類生活的各個方面，極為複雜。「從嚴重的犯罪行為起，直至簡單的不快念頭止，其間應有盡有。我對檢查制度的興趣，主要是對電影及戲劇、書面文字及視覺藝術的檢查制度。

還包括音樂，聽來似乎有點古怪，但人們却曾多次指責音樂令人討厭，猥褻淫蕩或兇狠殘暴。」

白懿禮續謂，檢查制度決不能脫離當地的廣泛社會環境。此種情況往往不僅見之於官方查禁行動；而且在每個市民對待特定形式的藝術及大眾媒介的態度中，亦顯而易見

「一般而言，藝術有感染力，會令人激動。因為藝術的作用之一就是激發起熱情，興趣和瞭解。但對於不想瞭解的人來說，藝術家想促進瞭解却令人惱怒。」

觀眾上台毆打演員

白懿禮引述藝術指導沙達曾講起，英國最近上演易卜生的「人民公敵」。「這個劇本對於地方議員及受賄者之類的人物，尤其是房屋承造商有極其尖銳的指責。有些觀眾對此等對白的反應非常強烈。一位男士突然衝上台去，揮舞手杖，企圖毆打演員。此人當然完全不合常理。但亦足以證明人們不喜歡聽不同的意見。

「但若推行檢查制度，如本港目前經已實行，人們同樣會視之為不合理。此種情形部份由於檢查制度亦為人們提出好壞愛惡的標準，其本身也有些不合理。

「我本人認為野蠻的暴力，香港却能完全接受。電影中隨處可見到此類暴力，千篇一律，拍完又拍的功夫片、鬥劍片、兒童滑稽片，其實都是十分令人厭惡的。

「我懷疑究竟是否有人已制定方案，查禁確屬危害市民的任何藝術形式。迄今為止，似乎只聽說檢查制度令人不快，如此而已。」

本會「會刊」指出許多人士不同意此種觀點，並堅持藝術確實可能危害市民。證據雖然不夠充足，尚未能遽作結論，但相信觀眾最多的傳播媒介——電視所定的規範對提高水準大有貢獻，究竟是否合理？相信銀幕上的暴力與街上的暴力並無必然關連，究竟是否合理？

新聞報導應否檢查

「此外，新聞報導沒有檢查，亦可能很有害。因為往往連篇累牘都是血流成河，尸積如山。報紙全都爭相效尤，千方百計拍攝刊登罪犯的照片，死尸的照片，對此却絕對不加查禁。

「電視幾乎經常不加思索，從早到晚連續不斷播映節目，我猜想觀眾會發現，危害不淺的不是特別節目，而是新聞報導及部份廣告短片。

「香港的生活往往充滿茶餘酒後的閒談，蜚短流長，故作神秘。許多所謂的事實其實純屬憑空杜撰。電視較電影對降低犯罪率有效之說，亦屬此類空論之一。如果確有效果，並無人能予以證實。」

檢查制度不會消失

但若檢查官確是「普通市民」的代表，而且又承認香港人口的大多數是年輕人，與父母的道德標準經已不同，檢查制度是否會因此很快煙消雲散？

白懿禮承認檢查制度近年來業已有所改變。「在理論上，香港對舞台劇亦予檢查。以前，張伯倫首相曾在英國實行過舞台劇檢查制度。如果香港將一份劇本寄給英國警方，對方就會遵循張伯倫勳爵的指示，判斷其是否有問題。但張伯倫勳爵的辦事處早已取消，他本人自然亦不能再作指示。英國警方明瞭此種局面，採取明智措施，舞台劇檢查因而消聲匿跡。

「檢查制度將逐步削弱，但真的煙消雲散，將會令人感到驚訝。我預料此種轉變將會相當緩慢，不會十分急劇。

「本港的代溝相當大，但未予注意，反予抑止，尤以家庭內部為然。總體而言，我認為學生的取捨標準比他們父母的要好得多。」

本港去年出口貿易統計詳析

本港貿易增長關鍵仍是美國及西歐。此兩地區去年佔本港出口總值達三分之二。本港須繼續分散出口市場及考察發展中國家市場，但本港出口貿易距真正分散化，為期仍遙。

回昇甚速 鼓舞人心

一九七五年一至八月，香港貿易總額急劇衰退，比一九七四年同期下跌12%。直至七、八月間，仍無人敢於相信到年底能回昇至僅低0.2%而已。

轉機雖然遲遲而來，但來勢之猛，確屬出人意料。出口貿易在九月上升18.2%，十月升25.5%，十一月升百份之24.6%，十二月升32.3%。在此期間，本港出口貿易每月幾達最低月份——二月之兩倍。此種復甦趨勢確屬鼓舞人心。

一九七五年整個出口貿易形勢雖然蕭條不景，但並非全無成績可言。經濟衰退對出口貿易會有反常刺激作用。一方面，有些市場之貿易數年來急劇增長，至此竟然一落千丈；但另一方面，仍有少數市場之貿易確實迅速增長，而且並非祇是石油出口國家。

澳紐兩國 跌幅較大

本港去年對澳洲及紐西蘭之出口貿易大幅下降，主要原因是兩國均實施嚴密入口限制政策及其他保護本國經濟措施。對澳洲之出口貿易，在一九七三年躍增73%，在一九七四年猛增69%；但在去年一至十一月份則劇降23%。對紐西蘭之出口貿易，前兩年分別銳增59%及56%，但去年却慘跌44%。雖然澳洲仍然是本港第四大出口市場，但紐西蘭卻從第十二位退居第二十一位。

亞洲市場 轉口仍穩

本港對大部份亞洲隣邦之出口貿易，在去年也因難重重。本會「會刊」兩年前撰文

，詳析亞太地區是世界上經濟增長最速地區之一，對本港出口貿易頗有潛力。兩年來之發展並未根本改變此一評價。雖然越南及高棉政權易手，其他東南亞國家動亂增加，仍不致改變此種大局。該等國家大都與香港一樣，大量依賴出口貿易，如果出口貿易嚴重下挫，就要被迫減少入口貿易。去年之情況就是如此。

影響該等國家出口貿易之另一重要因素，是日本經濟。日本經濟在去年遭遇嚴重衰退。一月至十一月期間，本港輸出口貿易下降11%，輪台灣出口貿易下跌36%，對星加坡下降2%，對馬來西亞下降1%，對印尼下跌37%。香港對整個亞洲地區之出口貿易，在去年下降16.5%。

必須強調，該等國家是本港主要轉口市場。每個國家所購來自本港貨物中，轉口貿易額均多於出口貿易額。本港對日本之轉口貿易，每年高達十億元，對星加坡之轉口貿易亦達九億元。如將轉口貿易與出口貿易合併統計，本港去年在整個亞洲市場之貿易確實仍屬穩穩。

輸美貿易 下降半成

如以金額結算取代百分比統計，香港去年對美國之出口貿易衰退最為嚴重。美國市場在香港整個出口貿易中之比重，近年來逐步下降。在一九六九年及一九七〇年，美國市場佔香港出口貿易總值之42%；到一九七四年及一九七五年，已下跌至32%。

此種趨勢應屬可喜，過份依賴某一市場並非善策。由於貿易發展局及本會等組織大

力提倡，本港出口商積極分散本港出口貿易市場，尤其是在發展中國家尋求新市場，迄今業已獲致可觀成果。然而，美國仍是本港絕對最大市場。本港輸美貿易雖僅下降5%，但以金額計算高達三億四千萬元。僅此下降值已多過本港對中南美洲之出口貿易總值。換言之，輸美貿易下降值，並非任何其他市場之增值所能抵銷。即使本港對西德出口增加15%，亦無濟於事。

共市貿易 尚有續增

歐洲共同市場情況與美國顯然不同。本港對共市九國之出口貿易，在去年一月至十一月，增加15%。無可否認，西德在其中佔極大比重，但本港在共市其他國家之貿易亦頗堪告慰。輸英貿易下降2%。但對照英國經濟之困境，已較預料結果為佳。然而，英國作為本港第二大出口市場之地位，已為西德所取而代之，而且在最近之將來亦不可能奪回亞軍榮銜。

本港對第八位出口市場——荷蘭之貿易，下降3%；對法國增加3%；對丹麥上升7%。本港在共市之出口貿易，最不景氣是意大利，政治經濟之危機近年似已成為意大利生活之組成部份。

如按本港出口貿易判斷，其他西歐國家似乎並未受到去年世界經濟衰退之影響。本港對該等國家之出口貿易確實迅速增長。如以瑞典為例，一九七四年購買港貨總值增加20%；一九七五年一至十一月間，續增24%，增值達八千二百萬元。又以奧地利為例，港貨在該國銷售總額，一九七四年增長26%，去年猛增41%。瑞士及挪威去年亦仍然相當堅穩。

中東油國 增長最巨

中東地區市場增幅最巨。本港對中東地區出口貿易額，一九七四年增加50%，去年仍增24%。本會「會刊」去年八月曾指出，中東市場之長期潛力十分可觀，但不應期望

阿拉伯產油國短期內將入口貿易猛增至飽和程度。二年前，油價雖然暴漲，許多產油商因為發展計劃野心過大，加之工業國對燃油之需求減少，所以產油國並未賺得預期之龐大超額利潤。

本港去年在中東之主要出口市場，分別為利比亞（上升22%），阿拉伯聯合酋長國（增加16%）及沙特阿拉伯（增長50%）。利比亞目前在本港出口貿易方面佔第十五位。

其他地區 乏善足陳

一般而言，本港去年對發展中國家之出口貿易乏善可陳。經濟衰退及油價飛漲，對該等國家之危害比已發展國家嚴重得多。非洲市場儘管增加百分之十四，但完全因為尼日利亞市場之意外劇增，竟比前年超過一倍以上。尼日利亞已取代南非，成為本港在非洲之最大市場，在全部海外市場中佔第十一位。尼日利亞及南非兩國市場佔本港對非洲出口總值之一半。

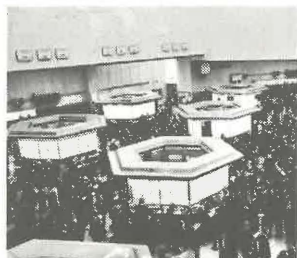
本港去年對中南美洲之出口貿易，下降10%。該地區國家大都實行嚴密保護主義政策，預料最近將來不會有真正改善。本會今年下半年將派遣貿易團，赴該地區考察各自自由貿易區。本港在拉丁美洲之主要市場是巴拿馬，該國在科倫及巴拿馬城有大規模自由貿易區。

本港對東歐國家出口貿易仍極低微，去年總額為六千二百萬元，大致與對伊朗及西班牙之貿易額相同。但增長幅度已達30%，頗堪告慰。然而，東歐國家與中東地區甚至拉丁美洲相比，差距仍然甚遠。

本會於聆聽工商各界意見，研審經濟統計資料之後，預測本港一九七六年上半年出口貿易總值，至少比一九七五年同期上升22%；而一九七六年全年總值將比一九七五年至少增加15%。

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