February, 1984
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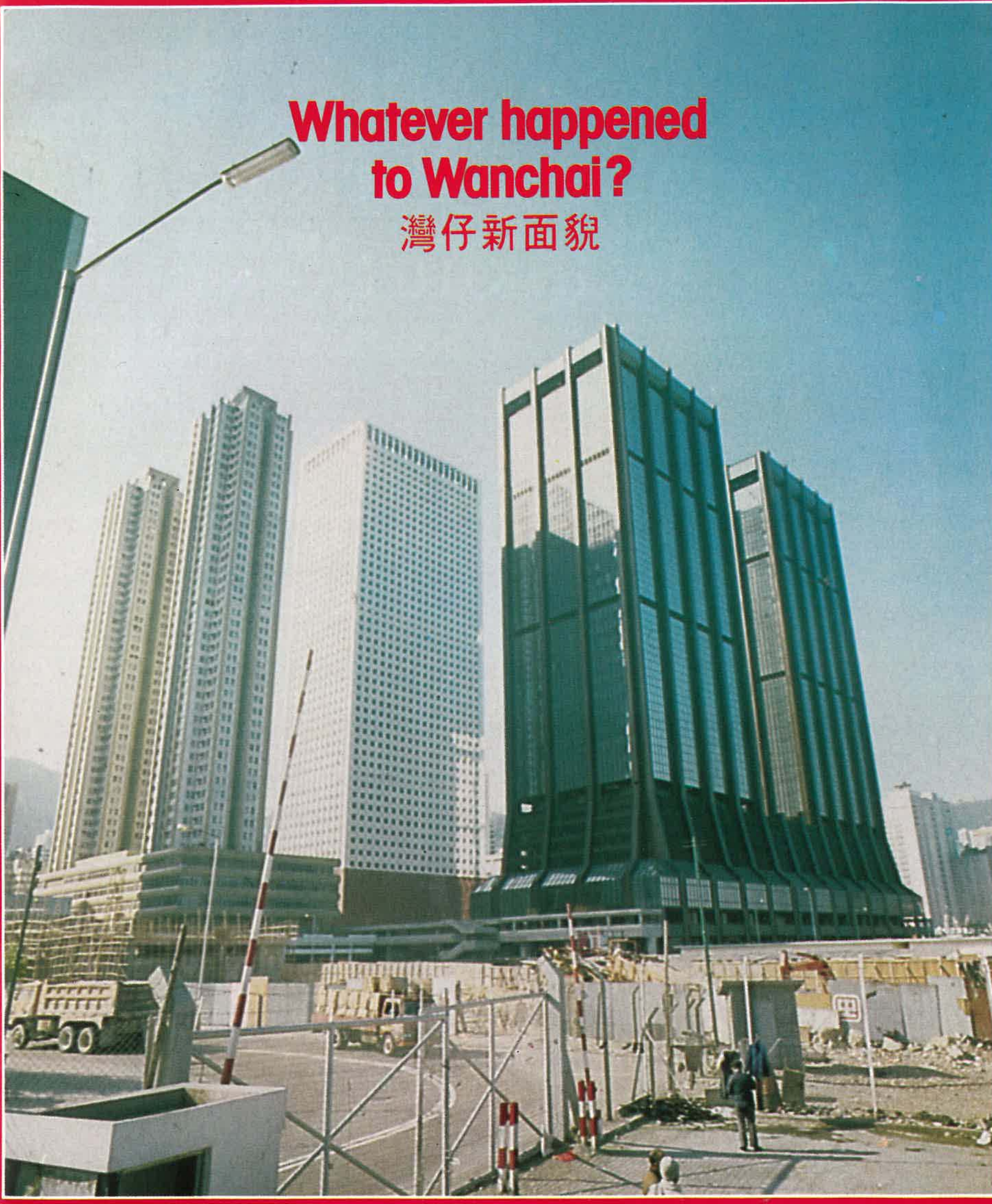
工商月刊 THE Bulletin

A Hong Kong General Chamber of Commerce Magazine 香港總商會月刊



Whatever happened to Wanchai?

灣仔新面貌

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Jimmy McGregor Reports...

Membership

We are now engaged in the always interesting exercise to gather in members' annual dues and, in order to allow us to arrive at early conclusions on likely losses of members (and their money), we run a weekly record which compares results last year and this year which provoked a good deal of thought in the Chamber Directorate. Despite our best endeavours during the year, we did not fully make up this loss and finished the year 4.61% down on our best 1982 figure.

We therefore wait with considerable interest to see whether our normal average annual loss of members at fee paying time of 6% is exceeded this year. I greatly hope not.

New Office

In order to improve our certification service to Kowloon based exporters, we have opened a new office on the 12th floor of Ocean Centre. This will be particularly convenient for exporters required to obtain export licences from the Government offices on the 13th floor of the same building.

As members know, we have another certification office in the Hongkong and Shanghai Bank Building in Mongkok and, of course, our main offices in Central handle a high proportion of all Chamber documentary services.

Investment

As members are aware, the Hong Kong authorities, assisted by a number of the principal trade and industrial organisations, have systematically promoted Hong Kong as an attractive investment prospect for the development of trade and industrial operations. The success of this promotional activity is well known and needs no elaboration. However, perhaps less well known is the constant activity in Hong Kong by overseas agencies seeking to attract Hong Kong investment into their countries. Some operate through private sector organisations, some by sending missions or organising seminars and some through leading members of their Governments. The Chamber has often been involved in assisting such promotions in the past, as a matter of reciprocal assistance to organisations helpful to Hong Kong's own efforts to obtain overseas investment.

The Chamber has recorded over thirty specific promotions during 1983 seeking Hong Kong investment. These include many countries like China, the United States, Canada, and Britain which have consistently promoted their attractions for Hong Kong investors but also countries which are not perhaps as well known here in this specialised field. These include Sri Lanka, India, Portugal, Jamaica, Nigeria, Luxembourg, Fiji Islands and Dominica whose delightful and very determined Prime Minister, Miss Eugenia Charles visited the Chamber for this purpose during May.

It would be interesting to know how many of these promotions are reasonably successful although it can be safely assumed that some are not, especially those which are single promotions and are not repeated as a part of a consistent programme.

As far as I am aware, Hong Kong has been, and remains, probably the third largest investor, after the U.S. and Japan, throughout the South East Asian area. Conversely, we have certainly the largest U.S. investment in any country in East Asia and that might well apply to our investment status with Japan as well. Investment is a two way flow.

I ask members to forgive these few inessential paragraphs on investment which have little to do with the work of the Chamber during December. Members might have some interest however in the general observations.

Labour Advisory Board

It has been agreed that the Joint Associations' Committee on Labour Relations will meet before each meeting of the Labour Advisory Board to consider and, if possible, take an agreed view on issues to be discussed at the LAB meetings.

This should help to coordinate the expressed views of employers' organisations and prevent misunderstandings such as those which occurred when the Employment (Amendment) Bill was under detailed consideration recently.

The Joint Associations Committee comprises the Chief Executives of the Employers' Federation of Hong Kong, the Hong Kong General Chamber of Commerce, the Chinese Manufacturers' Association of Hong Kong and the Federation of Hong Kong Industries, together with the four members of the Labour Advisory Board nominated by these organisations and the two additional employers' representatives on the LAB selected by the Commissioner for Labour.

The Work of the Trade Committees

On the recommendation of the Arab Committee, the Chamber is organising jointly with the TDC a business group visit to Dubai, Muscat, Doha and Kuwait from 19th February to 6th March, 1984. The group will consist of 17 Hong Kong companies interested in selling a wide range of consumer products. Mr. Sidney Fung, Manager, Trade Division, will accompany the group throughout the tour.

With advice from the West Europe

The Chamber in Action

Committee, the Chamber is organising two trade promotional missions to Europe in May 1984. The first mission will visit Frankfurt and Vienna from 6th to 20th May and the second will promote in Rotterdam and Barcelona from 13th to 27th May. With European economies slowly gaining strength, these missions should be quite timely.

Following a meeting of the Shipping Committee on 1st December, the Chamber made a submission on behalf of the Committee to the Marine Department expressing concern at the apparently relatively slow progress of dredging operations taking place at the Kwai Chung container port. A helpful reply was received from Percy Davy, Director of Marine.

The tariff Standing Sub-Committee of the Shipping Committee met on 21st December to prepare recommendations on possible improvements in the presentation of shipping statistics as set out in the "Hong Kong Shipping Statistics, January-March 1983". Following endorsement by the Shipping Committee, the Chamber will forward these recommendations to the Government for consideration.

A joint meeting of the Trade Development Working Committee of the Hong Kong/Japan Business Cooperation Committee was held in Hong Kong on 16th December to discuss matters affecting bilateral trade between Hong Kong and Japan and various ways to increase Hong Kong's share of Japanese imports into the market. The Chamber was represented by Mr. Sidney Fung at the meeting.

On the recommendation of the Committee, the Chamber will be organising a trade mission to visit Sydney, Perth and Melbourne in March. A circular was issued on 14th December to all Chamber members inviting their participation in the mission.

The Japan, Taiwan and Korea Committee agreed that the Chamber should organise a luncheon in early March in honour of the newly arrived Japanese Consul General, Mr. Hiroaki Fujii. Mr. Fujii has accepted an invitation to be the guest speaker at the luncheon which will be held at the Furama Hotel on Monday, 9th March.

Other Chamber Committees

The Taxation Committee met on 5th December to finalise a submission to the Financial Secretary regarding relief available on interest payments. The Committee suggested that the system should be revised so as to increase the tax yield. The submission was passed to the Financial Secretary on 13th December. It is understood that the Financial Secretary has responded by inviting comment on the Chamber's suggestions from the Chinese Manufacturers' Association and the Federation of Hong Kong Industries. A follow-up submission regarding past suggestions made to the F.S. was forwarded to him on 28th December.

The Legal Committee met on 3rd December to consider a series of suggestions put forward by the Commissioner for Securities regarding company disclosure. Following the meeting, a number of observations on the Commissioner's suggestions was forwarded to him.

The C.B.I. Scholarship Selection Committee met on 6th December and chose six candidates and one reserve, whose details were passed to the C.B.I. in London for placement with British companies.

Personal

May I wish all members a good and successful year in 1984. The Chamber will do its best to help make it so. ☐

From a 'sunset' to a Hong Kong 'sunrise' industry

The garment industry, with its 9,000-odd factories and over 260,000 workers, is spectacularly leading Hong Kong's export recovery as economic growth climbs again in the United States and begins to have some impact in Europe.

It seems certain to do well at least in the first six months of 1984. Indicators, like orders-on-hand and factory electricity consumption, have not looked better for years.

Yet the industry is beset with external restrictions and domestic production problems.

It is bound hand-and-foot by quota restrictions with little or no growth. It has suffered from quota cuts and frequently applied restraint mechanisms whenever specific export categories began to do well. It is threatened with new American restraints even on hitherto unrestrained categories that might have compensated for bi-laterally agreed restraint in others.

Besides, it faces in 1984 rising raw material costs, higher production expenditure and quota prices that are too dear. It suffers from a chronic shortage of skilled labour.

It has experienced hazardous exchange rate fluctuations. It continues to pay interest charges that often exceed those paid by its competitors. It has even had difficulty in finding capacity when it uses airfreight.

The Bulletin went to key people in the industry and government officials to ask why, despite all its difficulties, garments are doing so well?

Their answers (below) show the industry has met its challenges with a skill and an adaptability that has outmatched its competitors. In post-recession it has been reborn and begun to establish an identity all its own.

The re-birth has been due to three basic factors:

—Structurally, it mainly follows the familiar characteristic of all Hong Kong industries. Most factories are small, decision-making often almost immediate and operations flexible.

—Over the years it has built up vast experience and skills. It has invested heavily in cost-efficient machinery. Using these advantages it has been able to evolve to meet and take advantage of the post-recession increasingly diverse needs of today's new consumers.

—The people who work in the industry, from decision-makers to operatives, have produced the added-value goods that retailers in overseas markets find profitable to sell.

Hong Kong is no longer selling standard goods to the world's clothing mass markets. It is responding, at a reasonable cost, to the consumers' strengthening individuality in choosing what he/she wants to wear.

That garment is largely something new and different. It is only part of the consumer's bigger wardrobe as he moves with the times, enjoys more leisure and dresses with individuality for each of his increasingly diverse activities.

Hong Kong, though it has more quotas than other producing countries, can't expect to fill the post-recession consumer's bigger wardrobe. But within the limitations of its protectionist restraints, it has found a new medium-priced selling zone in world markets, especially in the United States.

John Chan, Deputy Director of Trade, describes it as an expanding "twilight zone," in the middle of the changing total market where Hong Kong's light, in the form of its added-value exports, is focusing and which will broaden and diffuse. It is producing a "sunrise" industry out of the mass production "sunset" standard garment industry.

This development justifies Francis Tien's bullish prediction for the future of the garment industry in Hong Kong. He says Hong Kong has become a leading world producer and will remain ahead of its competitors because of its capabilities.

Selling into a new 'twilight zone' — John Chan

John Chan, deputy director of trade, says the Hong Kong garment industry is emerging with an identity all its own as the world's leading producer for what he calls the "twilight zone" of the post-recession overseas market.

He says this is a rapidly developing fashion sales zone in between the haute couturiers of Paris and Rome and the mass market of standard garment styles.

Having got rid of its "sweat shop" image the Hong Kong garment industry is now in the process of shedding its "copy cat" image.

"We are establishing ourselves with our own identity as a world fashion design centre in addition to the reputation we have already acquired as the world's most flexible producer," he says.

He thinks the "twilight zone" will continue to expand as a growth market for Hong Kong's middle-priced fashion garments because standards are continuing to rise in the world as a whole. What Hong Kong is producing reflects this rising standards trend in the post-recession United States. Hong Kong merely is meeting that market's requirements.

The industry's place in its overseas markets is also the result of Hong Kong no longer being competitive at the lower end of the market in mass produced standard items.

"The only way we can survive is with new ideas and new designs and we are producing them," John Chan says. "Our products are not something a buyer can order in quantity in Paris nor in Taiwan and South Korea.

"We are where Japan used to be a few years ago. Now Taiwan and South Korea are where we used to be. Everybody is moving up the ladder."

John Chan says in 1983 in the overall restraint categories that matter quota utilisation was close to 99.9%. In the traditional "hot" categories, such as jeans and sweaters, it reached 100% back in September and October.

"We can expect to be using all our quotas up the hilt in 1984," he says. "There is still room for expansion in some restraint categories and in categories that are not subject to restraint."

He says 1983 proved an extremely good year for Hong Kong garments. Quota utilisation to West Germany and the United Kingdom was not as good as it was to the United States. But it was much better than in 1982.

Again in the "hot" categories quota utilisation was 100%. But overall in the restraint categories he expects 1983 will prove on final tally to be up in the 90-odd% bracket for both countries.

"In 1984," he says, "in terms of quantity our bi-lateral restraint agreements leave little room for growth. But Hong Kong will still do well and more than maintain its 1983 performance.

Upmarket

"The main way the industry will improve its profitability is by continuing to go upmarket and produce fashion goods for the 'twilight' market zone. Going up market is something our manufacturers have been doing ever since there have been quotas.

"The result is we have established ourselves in terms of quality, of reliable delivery and of having the necessary flexibility to export what the buyer overseas demands. Now buyers are coming to us for our designs which are often a blend of East and West and not something they could get in Paris or Rome.

"They know what we are capable of producing. They know we have our own developing identity and we are flexible and adaptable people. They know about added value and profits in the expanding 'twilight' sales zone."

John Chan mentions the £4.99 Hong Kong shirt on the British retail market to reinforce his argument. He says the consumer magazine, *Which,* voted it the best for value on the market. Shirts, he says, can be bought in London as cheap as £2.50. But it was Hong Kong's £4.99 shirt the highly discerning magazine tested and chose as the best buy for British consumers.

He describes Japan as an important contributor to the Hong Kong garment industry. He says Japan supplies a lot of the industry's high-quality raw materials. Japan also has some investment in the local industry.

John Chan says that assuming everybody takes his international obligations seriously he doesn't expect the bi-lateral restraint agreement scene to cause garment manufacturers further worries in 1984.

He says: "There will always be some problems but none that are insurmountable nor incapable of solution through consultation."

He expects this to be the case with the United States despite whatever restraints President Ronald Reagan may impose on unrestrained categories.

John Chan says Hong Kong's bi-lateral agreement with the U.S. runs until 1987. Hong Kong's agreement with the EEC runs until 1986.

The only country Hong Kong is still talking to about a bi-lateral restraint agreement is Norway. His Department is still trying to reach agreement.

Renewal of Hong Kong's agreement with Finland will come up about the middle of 1984. The Multi Fibre Arrangement runs until July 1986. It is still too early to take a view about its renewal.

He says worrying reports about an increasing protectionist trend are coming from the United States. They usually intensified in a Presidental election year.

But, he says, he doubts whether the United States or any other major market would impose restrictions that would risk a trade war. That is the last thing the Americans would want to get themselves into in 1984. □

'Re-born' with speed and adaptability — Stephen Cheong

Legislative Councillor Stephen K.C. Cheong, managing director of Lee Wah Weaving Factory Ltd., describes the modern-day Hong Kong garment industry as re-born with its well-known ability to produce quality at a reasonable price and with a speed and adaptability that possibly puts it among the world's leading producers.

He says the re-birth is due to a combination of factors:

Stephen Cheong explains as the educational standard of society everywhere progresses stronger individuality of character is sub-consciously manifest by consumers in increasing ways. He gives a simple example of the impact of this upon the garment industry.

He says whereas in the 1950s and 1960s people conformed and wore a white shirt to work, now that shirt is replaced with many different coloured shirts that also have many different collars and designs.

He says it is the same for all other types of human attire, especially when it comes to casual wear.

The people who assert stronger individuality also have more leisure time. They spend more leisure time both indoors and outdoors. Occasions thus more frequently arise for wearing different and appropriate types of attire.

A need is generated for a wider wardrobe and this presents more opportunities for clothing manufacturers. Total demand rises quantitatively.

"You don't wear a business suit to play tennis, nor a jogging-suit to dinner," he says. "Hence one's wardrobe is more extensive than what is used to be."

Stephen Cheong says though there is growth in total demand Hong Kong's ability to supply that demand is restricted by protectionism to a fixed level. For manufacturers to take advantage of the modern-day average consumer's bigger wardrobe it would be foolhardy to continue to concentrate on making diminishing volume items of attire, such as the white shirt.

What manufacturers have done in Hong Kong is move into the more fashionable and faster moving items. That's why the re-birth of the garment industry has developed.

Incidentally, Stephen Cheong still wears a white shirt to work. But he says he's conservative. He is managing director of garment manufacturing companies in both Hong Kong and Singapore and he sits as a director on five other companies as diverse as the Wing On Bank in Hong Kong and an aluminium factory in Taiwan.

He says the re-birth has been a process of evolution so far as the manufacturer is concerned. Each and every manufacturer has gradually dove-tailed his own operations at his own pace according to his own capabilities away from the metaphoric white shirt.

Stephen Cheong says: "One can't say it's happened as a result of either the buyer's initiative nor the manufacturer's. It's been a combination of both."

"The buyer sees a niche in the market and the manufacturer is willing to explore the potential opportunity. It's been a combination of the buyer's design and the manufacturer's interpretation of how his own products can be made to fit the niche.

"By working together they have invariably been able to come up with a line."

New Lines

New lines usually result in small orders with short production lead time and fast delivery.

Stephen Cheong says they are necessary for the health of the industry. In advancing in a fast moving market environment it is important we don't get ourselves over-committed in any one particular area before it has been thoroughly tried out.

"Overall quotas are fixed. Manufacturers cannot increase their unit volume. The only way out is to improve design and market ranges. To sell more expensively. But not to waste quota on market losers.

"The trick of the garment manufacturing game in Hong Kong is to pick as many winners as possible, not losers," he emphasises.

Stephen Cheong describes Hong Kong entrepreneurs as "efficiency buffs." He says: "They'll try out and buy any machinery they think will cut their costs. In the past 10 years the capital investment in new machinery and equipment in any reasonably-sized factory has been tremendous.

"We are one of the few countries in the world to instal and operate automatic equipment that will bring more efficiency into our plants and widen our productive capabilities. But we don't manufacture this equipment ourselves because we don't have a heavy industry infrastructure."

Stephen Cheong says another factor that has been very important in general to the rebirth of the garment industry is that Hong Kong people do go out into the world to look for new opportunities. Opportunities both to improve their cost structures and to discover the still uncovered niches in world markets.

Where does the re-born garment industry in Hong Kong go from here?

Stephen Cheong says it would be foolhardy to expect the industry to go on producing miracle after miracle. He thinks possibly it is approaching a plateau. It needs to consolidate.

"In order to grow we must find new markets," he says. "Japan is our next big natural market. Southeast Asia is another we need to look at. The Middle East countries are probably a third we could spend more time in developing."

Should Hong Kong develop more of its own branded items?

Stephen Cheong says the industry in Hong Kong needs a combination of marketing techniques and concepts. He thinks a Hong Kong manufacturer's own brands should not exceed 35% of his production volume.

"If you market your own brand exclusively over a period and you are successful you may find you lose touch with the market," he says. "You could become rather egotistical and

be left behind. Your whole operation could be left too exposed."
Stephen Cheong agrees the Hong Kong garment factory operative is adaptable in producing for fast-changing markets. But he says as a race the Chinese don't naturally have the same flair in styling finished attractive products the Italians workforce has right down the workbench line. He says the Italian operative will almost naturally give a twist here or some other movement there as she sews to give a garment flair.
"The Italians are more expressive in what they do to produce the attractive finished product," he says. "Whereas, the Chinese as a race haven't developed that flamboyancy."
Stephen Cheong says Taiwan and South Korea are both catching up with Hong Kong as a garment production centre. But they have the disadvantage that their manufacturing units are basically mass production, conglomerate-type organisations.
"Structurally, it will take them that much longer to adapt to the fast-changing world market scene. They are not all entrepreneurs in their own right as we are in Hong Kong.
"One of our advantages is that we comprise so many small companies with so many bosses able to make our own decisions. Bigger organisations have got to have rules and regulations.
"The result often is that they are not as quick in their responses as we can be in the decision-making process."
Stephen Cheong describes Japan as out of the running in the fast-changing garment production.
He believes it is important that Hong Kong manufacturers should continue to be exposed to other people's values, their desire for convenience and for economic and social progress. They must understand the motivations of their consumers.
The American consumer, for instance, more readily accepts different designs and concepts than the European consumer. In terms of colour co-ordination and dressing correctly for an occasion, he thinks the European consumer generally speaking has slightly more flair.
"In styling the Europeans are more conservative than the Americans," he says. "The Europeans are more conformist."
Stephen Cheong produces knitwear for North America and jeans for Europe. He says his own products reflect these consumer characteristics. □

In the forefront of the progressive producers

Legislative Councillor Francis Tien says so long as people wear clothes the garment industry will not only be Hong Kong's leading industry but in the forefront of the world's most progressive clothing producers.
"Look at the situation 10 years ago, he says. "They were saying then electronics would surpass us. They thought South Korea and Taiwan would catch up with us. Now, they say it's China we've got to worry about.
"But consider what has happened in the past 10 years. We have never stopped moving forward quicker than any of them. We're progressive. We're in the top world class.
"We have computer aided design (CAD). We've got laser cutting. These are things they don't even have yet in England. We were the first to use permanent crease technology.
"And what is happening now? Buyers are coming to us to consult about designs. They say they have seen what we have done for someone or other.
"They wonder if we could modify it a little and supply them. We are still definitely Hong Kong's leading industry, biggest employer and the world's most flexible producer.
"We are going to stay that way."
Francis Tien sounds a bit like a football coach in the locker-room at the interval. He actually rather resembles an amiable but on-the-ball headmaster. He is indeed, not just "Headmaster" to the clothing industry but of all Hong Kong's industries.
Francis Tien chairs Hong Kong's relatively new Vocational Training Council working with the new Technical Education and Industrial Training Department. He is also chairman of the Clothing Industry Training Authority which is above the Clothing Industry Training Board.
The Training Board began in the Seventies largely as a result of Francis Tien's efforts. He was chairman of that, too. Now the Authority has its own training centre at Kwai Chung producing 400 skilled operatives a year. It is building another at Kwun Tong that will have a slightly bigger output.

Francis Tien is a big garment manufacturer himself and he fought in the latter 'Seventies for a small levy on clothing exports to fund craft training for that industry and others. He was against the usually accepted principle that the Financial Secretary's budget revenues should not be hypothecated (pledged in advance rather than annually allocated through the legislative process).
Francis Tien's argument was that each industry needed funds on hand quickly to buy new technology and train operatives and through that flexibility to adapt and be ahead competitively on world markets. The 1979 Diversification Report settled the issue with a compromise.

Elevated

It recommended a Government subvented Vocational Training Council but elevated the clothing and construction industries that had their own training centres to authorities and allowed them to fund their Training Boards by levies (30 cents per $1,000 on garment exports or part thereof).
And which does Francis Tien now think has worked out best?
"As chairman of both the Vocational Training Council and the Clothing Industry Training Authority I think I am in a position to judge," says Francis Tien. "I think both are working well. But the constraints of Government procedures are less on the Authority than the Council. The Authority can sometimes move a bit quicker than the Council."
The Bulletin put these questions to Francis Tien:
Q. Some garment manufacturers report difficulty in recruiting young newcomers into their factories. Do you think there are special socio-economic reasons for the shortage when we still have some unemployment?
A. The shortage is not only in the garment industry. All our industries are experiencing a shortage. I think there are two reasons for this:
One is that more and more young

world's
– Francis Tien

people are going beyond Form Three with their secondary education. They are not immediately coming through for employment in industry. But they do come through later. It's a delay in through-put.

The other reason is a healthy one. The garment industry grew by 25% in 1983. It is beyond the available young element in our community to sustain such growth in industrial manpower needs.

As a result, the trend in our garment industry has been to automate and employ a smaller number of people. Unemployment is largely in the construction industry. They are usually the wrong type for employment in manufacturing. They are often not much help to other industries.

Q. Could you please give your personal view on how serious the problem may be in garments and what are the long-term implications?

A. The shortage is not new. We have experienced it for 10 or 20 years. That's one of the reasons we have manpower training today. Most manufacturers are not now providing training facilities in their factories since we've had a Clothing Industry Training Authority and a training centre at Kwai Chung.

Our Kwai Chung centre produces nearly 400 operatives a year. It hasn't eliminated the shortage problem but it has reduced it by 400 a year. Our second training centre at Kwun Tong will be completed early this year (1984) and its output will be a little more than Kwai Chung.

Garment workers are mostly female. After each marries she does go back to work. But after she has more than one baby she usually quits the industry.

Q. Demographic projections suggest Hong Kong could face an increasing shortage of industrial manpower in appropriate age brackets in the future. Have you any details that could illustrate the problem?

A. We are really talking about the age bracket 15 years and above. If industry is not going to be starved of manpower then our education policy must be framed in such a way young people will not just consider commerce and the services but will continue to consider employment in industry. There is a danger there. Education policy requires careful consideration.

Something like 70% of those who complete Form Three are going on to Form Five level. Those who don't get subsidised places often find other places for themselves. Yet of those going on to Form Five many are showing they are hardly suitable Form Five material. They would do better to come out at Form Three, get industrial training and then into industry.

Policy

Q. Has the Vocational Training Council considered this problem and formulated policy recommendations?

A. The Clothing Industry Training Authority recently did another manpower survey. It is now in draft form. It is being discussed by both the Council and the Authority. There will be no delay in either body in dealing direct with appropriate problems.

Q. What so far has been implemented?

A. We will soon have two not one training centres for operatives skilled on sewing and knitting machines at the craft level. We are also pushing apprenticeships for people like maintenance mechanics. They are going to our technical institutes.

After the new manpower survey has been assessed for training needs policies will be formulated. The Clothing Industry Training Authority will do this for operatives at the craft level and the training centres will implement that policy. The Council will assess the apprenticeship need in relation to the courses at the technical institutes that have been going on for a number of years. The courses the institutes start are part of the implementation of the Council's policy.

Q. Post-recession orders in the garment industry suggest adaptability and flexibility are more important than ever. Does your Council have a role to play in enhancing this characteristic in our workforce?

A. Yes, most definitely. The Council must have the means to ensure that the garment industry will continue to be flexible and adapt to new needs and technology. It's not doing a bad job. After all the industry has established itself as a leading world producer. Only Hong Kong makes the five boutique brands of jeans, for instance, not the American manufacturers.

Q. Your Council recently employed a consultant on technical education. Is there a need for a consultancy on industrial training?

A. No. The best consultants are the Training Authorities and the Training Boards themselves. The composition of their memberships are people from our own industries. They know more in their own fields than someone else coming from outside. The chairmen of the several industrial associations are all members. We have buyers from abroad coming here to consult us on designs.

Q. Is computer aided design (CAD) being used in Hong Kong?

A. CAD is increasingly being used in our garment factories. About 10 years ago I went to the United States and looked at CAD and laser cutting. At that time it cost something like US$10 million. I decided I couldn't afford it. Two years ago the cost was down to US$250,000 and I didn't have to wait any longer. It is now an example of what is being extensively used in pattern-making and mock-up. So is automatic cutting.

We should have centres with this sort of equipment so that the small manufacturer can use these facilities. CAD is not our first technological advance in Hong Kong. We introduced, for instance, permanent-crease technology long before the rest of the world's producers.

Q. How do the tertiary education institutions contribute to the garment industry?

A. The Polytechnic trains our technologists and a lot of our technicians. On the management side we go to the universities. □

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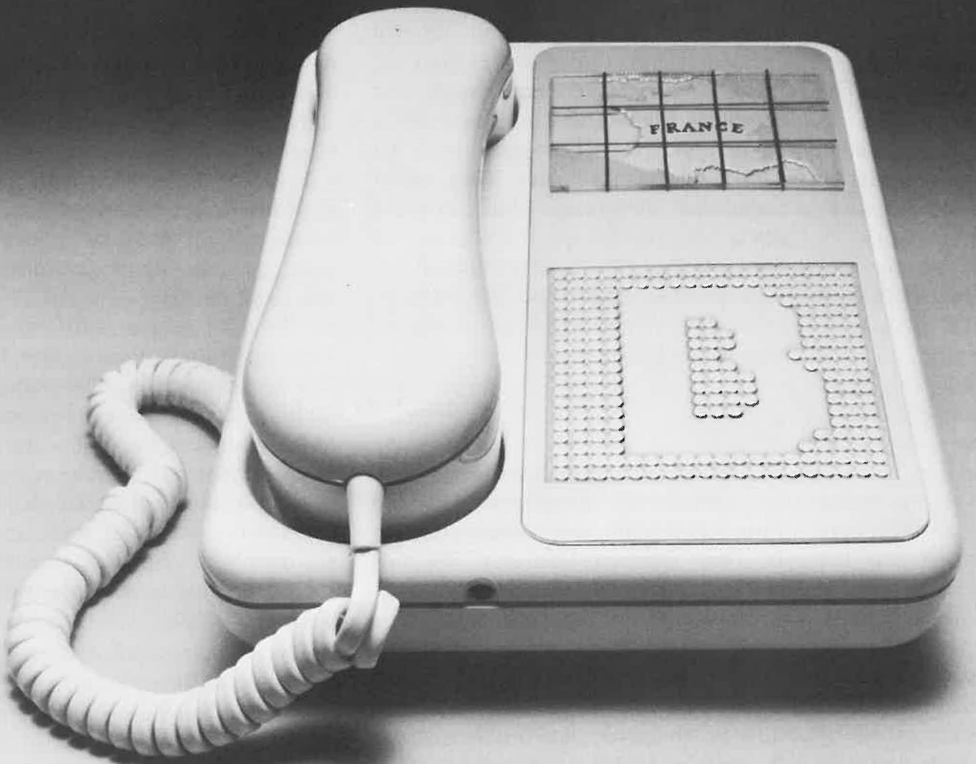

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______________________________ Telephone Number: ______________________________

Business/Trade Interests: ______________________________

Casual wear leads the export performance

Casual wear orders accounted for the major part of the garment industry's spectacular export recovery in 1983. Most manufacturers expect casual wear to continue to lead the industry's 1984 export performance.

Casual wear, where most quotas are available, embraces a wide variety of quickly changing fashion designs that are trendy and expected to be fast-movers on overseas retail store shelves. They are usually made in more colourful, attractive fabrics than denim, for instance, which is losing some of its popularity. The fabrics can be cotton, cotton blended with synthetic or pure synthetic.

The Bulletin interviewed one well-known medium-sized manufacturer of casual wear seeking his assessment of the industry's 1983 performance and its prospects in 1984. He asked to remain anonymous.

The manufacturer said he has two Hong Kong garment factories each employing 250 workers. He has another factory in Taiwan employing 1,900.

He said Hong Kong holds more cotton goods quotas for exports to the United States than Taiwan. But Taiwan has more for synthetic goods.

This, he explains, is the basic reason why he manufactures in both places. The EEC does not differentiate between cotton and synthetic the way the U.S. does in quota allocation.

Taiwan has changed its quota allocation system for 1984. At the time of the interview the manufacturer did not know the details. He says he is uncertain of his 1984 export prospects there.

The manufacturer says his factories experienced a record year in 1983, despite the fact that orders didn't begin to pick-up until the second quarter of 1983 and production wasn't in full swing until the third and fourth quarters.

The manufacturer expects in 1984 to be able to at least maintain his 1983 performance. He has orders on hand that will fill his plant capacity in the first six months.

He says demand throughout 1984 will depend, on the one hand, on the extent to which American buyers will continue to replenish their stocks run-down in the recession years. This was an important element of 1983 orders.

On the other hand, demand will depend on the continued expansion or otherwise of actual over-the-counter retail sales. Nobody knows yet how the equation is likely to work out.

But the Hong Kong casual manufacturer thinks he has enough time to wait and see and still take whatever action may be necessary in the second half of the year. After all he has six months' orders on hand.

Profit Margin

He explains manufacturers usually seek a 10% profit margin on their orders. Whether or not they achieve this often depends upon demand. The margin could go down to 5% or even as low as break-even point just to keep a factory running in bad times.

Quotas, he says, in 1984 are not going to increase. Profitability would thus have to be maintained over rising costs by manufacturers continuing to improve the quality of their casual wear products and by improving the productivity of their factories. Quality and design created added value and this is what both manufacturers and buyers are looking for.

The casual wear manufacturer said Hong Kong's flexibility in meeting buyers requirements for new designs and quality is better than in any other producing country. It is continuing to prove its capabilities by successfully producing more and more fashion garments.

Buyers, as their markets move out of recession, are not taking any chances. They order at short notice. Their orders are often small for new designs. They want a short production lead time. They want fast and reliable delivery.

As Hong Kong fulfils these overseas requirements it is running increasingly into competition with fashion producers in the buyers' home countries. The squeeze is being reflected in more frequent application of restraint mechanisms and talk of other protection.

But Hong Kong has to adapt to the changing overseas market requirements to survive. It has also to improve its productivity to cope with a chronic skilled labour shortage. Higher productivity as achieved enables manufacturers to pay higher wages and attract more workers.

The problem now is they are not attracting enough newcomers into the industry. Since Form Three education has become compulsory parents tend to want their children to continue their secondary education and to make careers in other occupations.

This presents the industry with a challenge. It has to invest in costly machinery that has a higher productivity capability, requiring a better-educated operative who must be appropriately rewarded for his skill.

Moving up in this way is proving expensive to the manufacturer. A standard singlestitch sewing machine, for example, costs $1,500-2,000. But a Juke single-stitch model with automatic trimming attachment costs $6,500. Auto-pocketing machines cost a lot more.

The smaller manufacturer, in the 10,000-15,000 square feet floor space range, can't always afford this expense. Some have been forced into liquidation despite more direct orders or more orders as a sub-contractor from a big factory.

Manufacturers' costs, he explains, are divided between the cost of the fabric he uses, the cost of cut-make-and-trim and the cost of having to buy quotas. All, he says, will be high in 1984.

For casual wear the major sources of fabrics are China, Japan, Italy, South Korea and Taiwan, as well as from local textile mills. Because most Hong Kong manufacturers don't produce their own brand-name products they don't tend to stock large inventories.

They tend to wait until they get orders then buy their raw material needs for those orders either direct or through a dealer. Overseas pruchases are made in US dollars or other foreign currencies. Local purchases are in Hong Kong dollars.

The casual wear manufacturer says cotton yarn prices rose 12-13% in

1983. Fabrics went up 10% in US dollar terms and 30% in Hong Kong dollar terms. High interest rates and a fluctuating exchange rate made raw material purchases a hazardous business.

The manufacturer has to make his purchases to meet his orders irrespective of whatever is the current level of interest and exchange rates. But that level over which he has no control could determine whether or not he actually makes a profit on his orders. He cannot safely predict the changing nature of his orders and buy forward.

Uncertainties through exchange rate fluctuations, he points out, were the highest on the list of business problems experienced in the third and fourth quarters of 1983 by firms in the wearing apparel industry that responded to Census and Statistics Department questionnaires.

Denim

High material prices came second and high interest rates came third among their problems. High wage rates were fourth and high quota costs and other restrictions came fifth.

He says the cost of denim increased the least of all fabrics in 1983. This reflected diminished demand. But even then denim rose 4% in US dollar terms.

Fabric price increases have added 10% overall to the selling prices of manufacturers, he estimates. At the same time the cost of cut-make-and-trim has gone up by 20% compared with the first quarter of last year.

Quota costs also reflected the increased demand in 1983. At mid-year "hot" items like trousers rose to $250 a dozen. Quotas for that item for 1984 are about 60% of the $250 peak.

Cotton pants quotas cost HK$40-50 a dozen in the first quarter of 1983. The price now is $150. To the United Kingdom quota for the same item cost $30 a dozen in the first quarter of 1983. Now they cost $70-80. For West Germany they were $60 a dozen. They now cost $120.

Current quota prices in all the sensitive categories show about the same percentage increase as cotton pants

180,000 women on 150,000 sewing machines

The profile of the average Hong Kong garment worker is predominantly female. There are about 180,000 women working on at least 150,000 sewing machines in over 9,000 clothing factories.

Most factories are small, employing 20-50 workers. They are often sub-contractors or make simple garments, like T-shirts and padded garments.

The rest (80,000) of the total garment industry labour force of 261,000 mainly comprise male supervisors and cutters. Other males employed are described as casual workers, men who have not acquired any great skill. They do the heavier manual jobs.

The average woman garment worker at her sewing machine is between 25-35 years. She has up to Form 3 education. She lives, often nearby, in a public housing estate with her husband. She often has a baby.

Her mother or her mother-in-law takes care of the child while the mother herself does a six-day working week. When she has more than one child she usually quits working.

The female garment worker earns between $1,500 and $1,800 a month. Her pay is daily rated but her total income also depends on her output. She banks her money with a passbook account and draws her cash needs from local bank branch electronic teller machines.

The total family income, if her husband has a reasonable skill, is between $4,500 and $5,000. She lives the usual public housing estate lifestyle. As part of that so-called "privileged society" the family of the garment worker pays relatively low rent and has above-average disposable income.

In the housing estates some save and invest. Most don't spend a lot on clothes.

What they wear — often jeans and a T-shirt — is cheap in Hong Kong. For some their idea of good living is good Chinese dinners. They visit Chinese restaurants more than the average.

The family has a television set and most of the electrical and electronic conveniences. They have a refrigerator but not an air-conditioner because public housing estate wiring cannot always take the load.

The female garment worker's fringe benefits include being driven to work and back home in a company bus, if she works for a bigger company that attracts the cream of the workforce. She is able to buy a company subsidised meal in the factory canteen. Some are able to go to China or on package tours abroad for short holidays.

The female worker at least in the bigger garment factories is better off than other industries, except for those who work in electronic factories. In electronics they are usually paid more. Recruits tend to be younger. Good eyesight is the employment criterion.

The 25-35 age bracket prefer not to work through microscopes. But they are skilled just the same. And they develop speed spurred by their pay incentives based on output.

Because they live in an open society

though the price level for each item differs. They reflect the extent of demand in 1984.

The total cost picture in practice is sometimes confounded by other variables and imponderables. The exporter, for example, can make a bonanza out of whether his invoices for the proceeds of his sales are demoninated in US dollars or Hong Kong dollars and depending on how the exchange rate has moved since he took an overseas buyer's order.

On the other hand his proceeds may be disputed by the buyer if he is late with delivery through no fault of his own. If the fabrics to be used come from China a manufacturer may be in difficulties in getting delivery. The buyer may ask for compensation.

Orders can also be cancelled on some other technical point. But this seldom happens now when garments are a supplier's market rather than a buyer's one.

The casual wear manufacturer expects fabric prices to go higher in 1984 if buyer demand continues at current pressure. But he doubts whether the increases will be as steep as they were in the latter part of 1983. He sees sportswear prices rising 10-15% in 1984.

The casual wear manufacturer *The Bulletin* interviewed sees many Hong Kong manufacturers reluctant to turn to Japan as a major market for their exports, though Japan has imposed no quotas. He says when Japan buys jeans for instance it expects them to be of the same quality as a kimono. Yet it wants to buy at the price ruling for less demanding overseas buyers.

He says Hong Kong manufacturers prefer to sell elsewhere if they can because they can make more profit from less effort. Difficulties in meeting the Japanese specifications on quality are often very time consuming.

Japan's own garment industry is not as flexible as Hong Kong has become. Difficulties with labour shortages and wages have forced the Japanese manufacturers into greater automation than Hong Kong. To make a profit they need bigger orders than overseas buyers are bringing to Hong Kong. □

and are exposed to the media they have an interest in fashion even if they don't always keep up with the Joneses, like the middleclass tend to do. This makes them personally interested and adaptable in producing garments of the latest design. This developed characteristic puts Hong Kong competitively ahead in meeting post-recession overseas orders that are becoming increasingly trendy. The worker is not subjected to union or other institutional labour barriers restricting job description.

Some say the female garment worker is better off following her own lifestyle than, say, the young female teacher of about the same age. The teacher earns more ($3,000) but her job status requires a lot more personal expenditure on clothes, rent, transport, etc.

However, the female garment worker is subject to a constant hazard if she doesn't obey the law and keep the finger guard on her sewing machine. She can get an extremely painful needle through a finger.

Yip Yuk-lun, acting chief factory inspector at the Labour Department, says there are about 2,000 accidents like this every year. But these accidents are seldom permanently disabling.

The more serious garment industry accidents, sometimes involving amputations, happen to male cutters using electric scissors. There are a few hundred like this every year. Some lose the tip of a finger, or more.

Y.L. Yip specialises in occupational safety. He attributes most accidents to the psychological outlook of the garment worker rather than to the pay incentive to work fast. He says the experienced worker sometimes thinks the finger guard is "for the birds" or the "greenhorn."

The experienced worker knows the danger of not using the finger guard but he or she believes they can avert the risk. Even if they do get caught they know it is not going to be fatal.

Y.L. Yip asks: "How do you argue with somebody who has been getting away with it for so many years? Yet they could get used to using the finger guard in a few days and it would not then affect their speed."

He says his Department places its hope for reducing the number of accidents in the garment industry on the younger generation. They tend to listen to a safety message better than the older more experienced hands.

The experienced sometimes listen only to be polite. The safety message goes in one ear and out the other. The garment worker sometimes thinks long experience without an accident is proof he or she can avoid trouble.

The Department, Y.L. Yip explains, believes in in-depth publicity through TV, radio, open-air entertainment and multi-vision shows to arouse awareness and a safety sense. "We employ pretty faces having fun and going on outings to get across the message: 'If you want to enjoy life don't do silly things like injuring yourself.' "

The Department also has an educational programme. It teaches ways and means of avoiding accidents and safety know-how. Its officers go to the vocational training schools, technical institutes and apprenticeship classes to spread the safety message. They give safety talks with movies or an in-depth lecture series.

The Department does routine factory inspections and its inspectors consult on-the-spot with the workers and factory management on accident prevention and promotion of safety standards. It prosecutes to enforce the law in serious cases, usually involving fatalities or publicised accidents that alarm a concerned public.

Y.L. Yip says the incidence of accidents to garment workers is not all that great considering the large number of sewing machines, etc. used in the garment industry. The incidence is second only to the construction industry but garment industry accidents are seldom disabling and rarely fatal. □

Workforce will grow to over 300,000

The Clothing Industry Training Board last surveyed the manpower needs of the clothing industry in collaboration with the Census and Statistics Department in September 1983. The survey has not yet been published but analysis of the information collected is expected to show vacancies reported by employers to be over 25,000, or nearly 10% of the clothing industry workforce of 269,810 at that time.

Workers are engaged in 31 principal jobs in the industry. Their distribution according to skill levels is about:

Level of Skill	Male	Female	Total	Percentage of Total Labour Force
Technologist	3 098	429	3 527	1.3%
Technician	10 712	4 868	15 580	5.8%
Craftsman	5 529	4 225	9 754	3.6%
Operative	36 629	167 840	204 469	75.8%
Unskilled	13 357	23 123	36 480	13.5%
Total	69 325	200 485	269 810	100%

Males represent 25.7% of the workforce, females 74.3%.

The two principal jobs at each level of skill with the largest number of employees last September were:

Level of Skill	Job Title	Number of Workers
Technologist	Production Manager	2,148
	Merchandising Manager	1,027
Technician	Production Section Supervisor	7,306
	Production Department Supervisor	2,905
Craftsman	Clothing Operator Instructor	4,956
	Pattern Grader/Marker Maker	2,448
Operative	Lockstitch Sewing Machine Operator	97,535
	Special Purpose Sewing Machine Operator	38,549

About 1,400 trainees/apprentices are employed in the industry. Their distribution by level of skill is believed to be:

Level of Skill	Number of Trainees/Apprentices	Percentage of Total Number of Workers at the Same Level
Technologist	3	0.09%
Technician	205	1.30%
Craftsman	97	0.10%
Operative	1 110	0.50%
	1 415	

Employers believe it takes two years to train a technician, four years to train a technologist, three to four years to train a craftsman and under half a year to train an operative. Vacancies by level of skill are believed to be:

Level of Skill	Number of Vacancies	Percentage of Total Number of Workers at the Same Level
Technologist	31	0.9%
Technician	126	0.8%
Craftsman	158	1.6%
Operative	23 657	11.6%
Unskilled	1 139	3.1%
	25 111	

By September 1984 the clothing industry workforce is expected to grow by about 11.3% to over 300,000. The distribution by level of skill will probably then be:

Level of Skill	Forecast Number of Worker September 1984
Technologist	3 575
Technician	15 944
Craftsman	10 072
Operative	232 513
Unskilled	38 087
	300 191

At the technologist level (production manager, quality control manager, fashion designer, merchandising manager and development/engineering manager) about 550 now earn over $7,000 a month, 750 earn between $5,501 and $7,000, 1,400 earn $4,201-$5,500, and 630 earn $3,201-$4,200.

At the technician level (supervisors, co-ordinators, inspectors and merchandisers) most are paid $2,500-$3,200. At the craftsman level the major wage brackets are $2,001-$2,500 and $2,501-$3,200. They include mechanics, pattern graders and marker makers and operative instructors.

At the operative level the majority earn between $1,500-$2,500. But over 38,000 earn up to $3,200 or more. The majority of the unskilled general workers (over 36,000) earn under $1,500. About a third earn more.

Across the whole labour force 36,000 earn under $1,500; 84,000 earn up to $2,000; 83,000 earn up to $2,500; 50,000 earn up to $3,200; 12,000 earn up to $4,200; 3,000 earn up to $5,500; over 1,000 earn up to $7,000 and about 570 earn over $7,000. □

Classic case of urban renewal

Wanchai is one of the most densely populated areas of Hong Kong and has always been a showcase example of high-density, mixed commercial-residential landuse. Demographic figures, however, indicate signs of diminished residential population as a result of an increased proportion of land used for offices or for other non-residential purposes. The 1961 Census showed that 184,000 people lived in Wanchai. This dropped to 124,000 in the 1976 Bi-census.

Wanchai's rapid development is traceable to the Fifties when the government decided to embark on the enormous task of urban renewal. Wanchai, together with Yaumatei, Taikoktsui and Sai Ying Poon, were designated as the four Environmental Improvement Areas (EIA) in the years from 1969 to 1971.

The EIA scheme was conceived as a means to improve urban landuse, a measure which Wanchai then, with all its old and unsightly pre-war buildings, badly needed.

It was not until the late Seventies that Wanchai became what it is today, with fairly modern highrise blocks and a fast growing amount of commercial landuse. According to the Urban Area Development Organization of the Lands and Works Branch (UADO), there are two major mixed commercial-residential zones in the district:

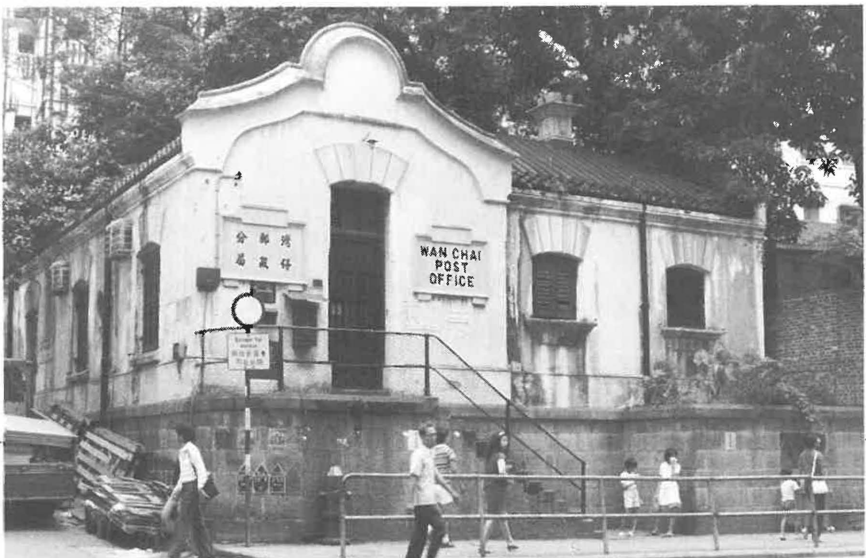
The Old zone, which falls between the boundaries of Arsenal Street, Gloucester Road, Percival Street, Leighton Road, Morrison Hill Road, Wanchai Road and Johnston Road. Originally a piece of barren reclaimed land in the 1920s, the zone has prospered into a high-density area well-known to Hongkong people and tourists alike as a major shopping, entertainment and service centre.

The New zone, which is the newly reclaimed Harbour Road waterfront north of Gloucester Road. This brand new commercial-residential zone – though only one block is so far actually rented for residential use – has been planned to attract investors.

Property development on the 7.6-hectare new zone began in 1974. A Wanchai development zone map drafted by the UADO shows that the zone is about 6% of the entire Wanchai area which totals 126.18 hectares. The old and new zones together make 26.74 hectares, which means that 21.19% of land in the district is utilised for mixed commercial-residential purposes.

In the eyes of UADO town planner Henry Kwok, the new zone is a well-planned area complete with all the major infrastructure and utilities necessary for a business area. The zone consists of five blocks, four of which are already completed:

– Great Eagle Centre and Harbour Centre
– China Resources Building
– Causeway Centre
– Sun Hung Kai Centre
– Government land on which will stand an Urban Council sports stadium, recreational and cultural complex, a permanent exhibition centre, a pro-



menade and a bus terminal.

Much has been said about the 'office exodus' from Central to Wanchai for cheaper rents. Kwok sees the phenomenon as an example of landuse ultimately determined by socio-economic factors rather than pre-conceived town planning alone. Wanchai's cheaper rents in the last property boom not only lured many private establishments to Wanchai. The migrants also include government departments such as the UADO itself which now operates in Harbour Centre.

"Developments in urban landuse is a dynamic process, and there is always the possibility of a Wanchai-to-Central backflow once Central offices are competitively priced. There are signs that a backflow is already under way now that some Wanchai office rents are going further down to gain a sure edge over Central," says Kwok. "Urban development is indeed a quick indicator of trends in the economy."

"In a market-force controlled economy such as Hong Kong, town planning contributes to an area's development through landuse zoning and setting up basics such as roads, traffic flow pattern and recreational spaces," says Kwok.

As a potential business centre, the Harbour Road waterfront must be ready to take an increasingly heavy traffic volume. Kwok expects the traffic flow to expand substantially in the coming years, particularly after 1987 with the completion of the exhibition centre.

Currently the waterfront traffic is served by two exit/entrance points, namely Marsh Road Eastbound to Causeway Bay and Fleming Road Westbound to Central. According to Kwok, the Trade and Industry Department, keeping in mind the potential of the area as an exhibition centre, are reviewing the situation and proposals made to add more traffic points to serve the waterfront area.

More exciting still for pedestrians is that the MTRC is considering building an elevated walkway linking the future O'Brien Road, MTR station with the Harbour Road area. The government is also studying the possibilities of constructing an impressive elevated walkway network running all the way from Central to Wanchai and Causeway Bay.

Kwok says that 70% of what the EIA plan set for Wanchai's environment improvements has already been accomplished now. The rest is mainly the redevelopment of sites for government, institutional and community usage.

The Harbour Road strip is the last piece of reclaimed land of its kind on Hong Kong island, says Kwok. However, the Lands Department has already appointed consultants to investigate future reclamation possibilities and overall urban land availability with respect to an ever-expanding population. The investigations have materialised in a report with the abbreviated title of the SHRUG report, which is to be made public in due course. Wanchai is projected to have a population of 174,000 people by 1996, a strong reason for its inhabitants to expect further development in that area. □

New waterfront — and a new business zone

Towering over the Wanchai Harbour Road waterfront is the 46-storey Sun Hung Kai Centre, headquarters of Sun Hung Kai Properties Ltd, one of Hong Kong's property giants. SHK offices occupy five floors, with the rest leased to companies including Dow Chemical Pacific Ltd, Caterpillar Far East Ltd and the Hong Kong Government.

Sun Hung Kai is one of the many companies that have moved to Wanchai waterfront in the past few years to get away from skyrocketing office rents in Central during the last property boom.

Thomas Chan, project planning manager of Sun Hung Kai Properties Ltd, points out that the site where the SHK Centre now stands was purchased as early as 1978, when the company decided to help make the then newly reclaimed waterfront a new business zone.

"Before moving our headquarters here in 1981 we used to rent offices in Connaught Centre. We were lucky to secure the rent at about $20 per square foot, which was already lower than the then average rate of $30 a square foot in the same building," says Chan. The attractions of much lower rents in Wanchai cannot be emphasized enough, for the per-square-foot rate in SHK Centre was a mere $8 in 1981; $17 in 1982 and approximately $12 in 1983.

Chan is quick to add that SHK Centre (and other new office blocks along Harbour Road in general) offers first rate office flats comparable to any prestigious building in Central. It goes without saying, therefore, that SHK moved its operation base into the self-owned Centre and started offering the rest of the building to potential tenants.

Other factors that prompted SHK to invest $200 million ($140 million of which was for the land) in the SHK Centre project include the area's proximity to Central, easy access to major roads and public transportation systems and a beautiful harbour view, all of which Chan reckons to be crucial considerations for any company moving office.

Expanding

It turned out that SHK had been right. The first phase of SHK Centre was offered to the public in 1980 and 1981 when rentals peaked and many companies were keen on expanding offices. The result was an acute shortage of spacious, up-market and affordable commercial premises. Wanchai was the answer. The new blocks rising over the waterfront triggered off an exodus of companies from Central. In retrospect, however, Chan believes that despite a sustained high percentage of leasing in the area, less companies now moving from Central to Wanchai are making the move for rental reasons alone. What tenants actually look for these days are well-managed, top-class office space and facilities. Wanchai has a ready and abundant supply found nowhere else on the island.

David Davies, managing director of Hong Kong Land Co. Ltd, said at the Hong Kong Club Building topping out ceremony last December that the Central-to-Wanchai exodus is on the wane as a result of eased rents in Central.

This is certainly not what the Hong Kong Trade Development Council thinks. The TDC, the largest trade-promoting body in Hong Kong, is moving this year from its present premises in Connaught Centre to three leased floors totalling 40,000 square feet in Great Eagle Centre opposite SHK Centre. Does the move indicate that instead of a backflow to Central, the Wanchai waterfront is indeed threatening Central as the commercial zone?

"What might happen is a merging of the two districts into one continuous central business area bridged by new blocks in the in-between zone around Admiralty, such as Admiralty Centre and the Hong Kong Club Building among others," says Chan. "But the Wanchai waterfront development in itself will be remembered for its phenomenal contribution to Hong Kong's property development history. Tsimshatsui East is perhaps its only counterpart," Chan says.

SHK's other investments along Harbour Road include the Harbour Centre, a joint project with other property developers; and Great Eagle Centre, parts of which the company owns.

Chan is optimistic about office accommodation demand this year. "The market is certainly there, and after the past two sluggish years a high percentage of new office premises should have been leased by the latter half of 1984. Current rents should be able to hold because of high construction costs. An overall rise in office rentals is likely later this year as the economy pulls itself further out of recession," Chan concludes. □

Suzie Wong wouldn't know the place now!

Richard Mason's Suzie Wong would be surprised by the many changes that have occurred in Wanchai's bar business since Suzie's hey day. *The Bulletin* interviewed Mrs. Pauline Ng of the Wanchai Police Station Licensing Office on the changing face of Wanchai's bar business.

Figures in December 1983 show that there are 41 bars and pubs with liquor licenses (excluding night clubs) in Wanchai, most of which are located along Lockhart Road. The heart of the bar zone, though, is where Lockhart Road meets Fenwick Street and all the way to O'Brien Road.

According to Mrs. Ng the 'classical' Wanchai bar is actually a topless bar with a clientele mainly of sailors and foreigners but is usually Chinese-owned. A typical bar of this kind has a long counter where liquor is served by topless waitresses. All the major bars of this type still in business such as Suzie Wong, and Winner Bar are long-time establishments, while others have either closed down or been converted to massage parlours or 'Chinese-style night clubs' (also called 'fish-ball stalls'). Even the Crazy Horse, originally a topless bar, is now closed after a brief period of 'fish-ball stall' business. Competition is intense, and topless bars are on the decline now that numerous entertainment parlours and saloons have mushroomed in the district.

A 'fish-ball stall' is practically a bar. But instead of the liquor counter the premises is full of densely packed rows of seats for its clients and bar girls. "The stalls business peaked three years ago and almost knocked traditional topless bars out of business," says Mrs. Ng. Competition pressured many topless bars to renovate their interiors and take up the stalls business, but the entire business soon ran out of steam as a result of more effective enforcement of anti-vice-establishment laws.

After fish-ball stalls came massage parlours which now lead the trend. The parlours mushroomed, some have been converted from previous fish-ball stalls while others are brand new establishments. Currently only about 10 such parlours in Wanchai hold massage parlour licenses, though. Mrs. Ng estimates that there are as many as 50 licenseless massage parlours now operating illegally in the area. "Actually many of these parlours have filed license applications. The pile is enough to keep us busy for some time," says Mrs. Ng.

Another emerging trend is 'qing' bars, meaning non-girlie pubs where liquor sales make the bulk of turnover. These are the bars where folksong singers are hired to cater for the taste of local customers. Some also serve light meals and are becoming pub-restaurants. There are three to four bars in the district almost exclusively patronised by Filipinos, as well as a few discotheques which non-Chinese teenagers frequent.

Variety aside, Wanchai's bar business has made some positive progress. According to Mrs. Ng the new bars as well as massage parlours are generally clean and well-decorated. Another sign of improvement is a much lesser number of underage (i.e. under 16) bar waitresses, probably because management is deterred by the carry-your-ID-card policy. Thirdly, the new bars, especially 'qing' bars, tend to move away from the old cluster along Lockhart Road, to, for example, as far as Morrison Hill Road. Decentralization is mainly a result of more bars being set up in basements or ground floors of new buildings in various parts of Wanchai. However, no girlie bars have yet appeared in any of the new office blocks along the Harbour Road waterfront.

Other entertainment venues in Wanchai include 13 night clubs and ballrooms, 60 amusement game centres (3 of which are for children under 16) and 4 licensed public billiard saloons. There are also 49 legal registered boarding houses, while the number of illegal one-girl brothels is estimated at between 35 and 50.

"Nowadays it is Tsimshatsui and Causeway Bay instead of Wanchai that really lead in the density of bars in Hong Kong," concludes Mrs. Ng. But to the generation that still remembers actress Nancy Kwan playing Suzie Wong in the novel-based film, Wanchai and its once-glamorous bar business will continue to be remembered with an aura of nostalgia. □

The In-tray

New members

Eleven members joined the Chamber in January:-

Evergood Restaurant (Wanchai) Ltd.
Foundation Industrial Co. Ltd.
Frontier & Co.
Fu Lim Overseas Trading Co.
Guvana Enterprises (HK) Ltd.
Hanway International Supplies Ltd.
Intermagnetics Far East Ltd.
Skill Knitters Ltd.
Toppan Moore (HK) Ltd.
Trans World (HK) Associates
Tri Russ International (HK) Ltd.

Diploma In Business Management Programme

A Chinese diploma programme, the Diploma in Business Management Programme, is offered jointly by the Hong Kong Management Association and Hong Kong Polytechnic. The objective of the Programme is to provide in-service and up-and-coming executives as well as owners of smaller businesses whose main medium of on-the-job communication is Chinese, with in-depth and practical knowledge of the nature and scope of management.

The Programme is built on a modular system to enable participants to progress at their own desired pace and to select courses according to their specific needs. Participants will be qualified for the Diploma after the satisfactory completion of 8 Basic Modules and an additional 4 Modules of a particular Orientation of their choice. The 4 Orientations are Marketing, Personnel, Finance and Production.

Conducted in Chinese (Cantonese), this Programme has the distinct advantages of having the contents of lectures more easily comprehensible and directly applicable to their work than lectures conducted in English, for most Cantonese speakers. First of its kind in Hong Kong, this Programme aims to help Chinese-oriented companies in their manpower development programmes as well as individuals who desire a formal business education in Chinese.

The Hong Kong Management Association and Hong Kong Polytechnic endeavour to direct and control this Programme so that it will be an academic equivalent of our Diploma in Management Studies Programme (DMS) which is conducted in English and which has received high acclaims and popularity among government agencies and business firms in Hong Kong.

Applicants must be of age 23 or above, be in possession of the Hong Kong Certificate of Education or equivalent, be in employment and with an appropriate working knowledge of English.

The coming academic term will begin on 7 April 1984 and the closing date for applications will be 18 February 1984.

Requests for enrolment forms or details concerning the Programme should be addressed to the Joint Directors, the Hong Kong Management Association, Management House, 2/F., 26 Canal Road West, Hong Kong. (5-749346/730291)/(3-642203).

Photographs Transposed

We regret some photographs in the section on Holland in our January issue were transposed. Mr. J.D. Altink's photograph appears on Page 42 instead of Page 43. Mr. Harry Woulters appears on Page 43 instead of Page 31. Mr. F. van den Akker's photograph should have appeared on Page 42.

Mr. I.W. Harris, vice-chairman of the Chamber's Taxation Committee, explains at a press conference on December 20 a new means proposed to the Financial Secretary of making good the fall-off in tax revenue following abolition of the 10% withholding tax on interest earned on Hong Kong dollar deposits. Mr. Cameron G. Greaves and Mr. P.R. Gillespie (left), two Taxation Committee members, assisted Mr. Harris. Mr. Jimmy McGregor, Chamber Director, and Mr. Harry Garlick, Assistant Director - Administration, are sitting on the right of the picture. Mr. McGregor explained the Chamber's interest in the proposal, saying it might avert the need for any increase in standard tax rates or other measures that might seriously penalise companies now pulling out of recession.

Trade in Progress

Hong Kong Overall Merchandise Trade (HK$M)

	Jan.-Oct. 1983	Jan.-Oct. 1982	% Change
Imports	139,486	116,649	+20
Domestic Exports	83,091	67,493	+23
Re-Exports	44,331	35,917	+23
Total Exports	127,422	103,410	+23
Total Trade	266,908	220,059	+21
Balance of Trade	-12,064	-13,239	- 9
Visible Gap as % of Total Trade	8.65	11.35	

Imports : Major Suppliers (HK$M)

	Jan.Oct. 1983	Jan.-Oct. 1982
China	33,198	26,581
Japan	32,034	25,719
USA	15,542	12,675
Taiwan	9,869	3,397
Singapore	8,432	8,548
UK	6,051	5,627
South Korea	3,991	3,703
Fed. Rep. of Germany	3,726	2,833
Switzerland	2,571	2,149
Australia	2,197	1,911

Imports : Major Groups (HK$M)

	Jan.-Oct. 1983	Jan.-Oct. 1982
Raw materials	59,679	46,387
Consumer goods	37,055	31,089
Capital goods	17,990	16,437
Foodstuffs	15,519	13,544
Fuels	9,243	9,193

Domestic Exports : Major Markets (HK$M)

	Jan.-Oct. 1983	Jan.-Oct. 1982
USA	35,062	25,514
UK	6,746	5,727
Fed. Rep. of Germany	6,211	5,544
China	4,809	3,051
Japan	3,102	2,646
Canada	3,028	2,132
Australia	2,231	2,350
Singapore	1,783	1,590
Netherlands	1,531	1,321
Saudi Arabia	1,272	1,063

Domestic Exports : Major Products (HK$M)

	Jan.-Oct. 1983	Jan.-Oct. 1982
Clothing	27,350	23,394
Toys, dolls and games	7,333	7,751
Textiles	5,576	4,032
Watches	5,033	4,315
Radios	2,846	2,960
Electronic components for computer	2,515	1,236
Electric fans	1,199	827
Hairdryers, curlers and curling tong heaters	1,094	841
Handbags	683	919
Footwear	608	617

Re-exports : Major Markets (HK$M)

	Jan.-Oct. 1983	Jan.-Oct. 1982
China	9,004	6,550
USA	6,273	4,622
Singapore	3,643	2,884
Indonesia	3,231	3,679
Taiwan	2,734	2,211
Japan	2,455	2,105
South Korea	1,973	1,370
Macau	1,515	1,270
Philippines	1,393	1,190
Saudi Arabia	1,137	751

Re-exports : Major Products (HK$M)

	Jan.-Oct. 1983	Jan.-Oct. 1982
Textiles	6,118	5,367
Chemicals and related products	3,986	3,200
Electrical machinery, apparatus and appliances and electrical parts	3,792	2,772
Articles of apparel and clothing accessories	3,638	2,439
Photographic apparatus, equipment and supplies and optical goods, watches and clocks	3,377	2,559
Crude materials, inedible except fuels	2,912	2,443
Food	2,865	2,310
Non-metallic mineral manufactures	2,091	2,108

Values and volume - monthly progress (HK$M)

	Imports		Domestic Exports		Re-exports		Total Trade
	$M	Quantum Index (1981:100)	$M	Quantum Index (1981:100)	$M	Quantum Index (1981:100)	$M
1980	111,651	90	68,171	92	30,072	78	209,894
1981	138,375	100	80,423	100	41,739	100	260,537
1982	142,893	98	83,032	97	44,353	97	270,278
Monthly Average							
1982	11,908		6,919		3,696		22,523
Jan. 1983	11,537	91	6,439	90	3,718	95	21,694
Feb.	10,166	79	5,569	76	3,435	87	19,170
Mar.	12,440	97	6,620	91	3,999	101	23,059
Apr.	13,533	104	7,612	103	4,171	103	25,316
May	13,933	106	8,003	107	4,285	103	26,194
June	14,481	109	8,920	116	4,389	106	27,790
July	15,184	113	9,853	126	4,718	113	29,755
Aug.	15,119	111	9,965	125	4,856	115	29,940
Sept.	15,494	109	9,664	119	5,068	119	30,226
Oct.	17,618		10,479		5,715		33,812

Area Comparison (HK$M)

	Imports Jan.-Oct. 1983	Domestic Exports Jan.-Oct. 1983	Re-exports Jan.-Oct. 1983
Asia (excluding China)	62,729	9,600	19,929
China	33,198	4,809	9,004
West Europe	19,948	21,265	2,918
(EEC	*16,238*	*17,543*	*2,302)*
North America	16,574	38,121	6,823
Australia	2,197	2,231	717
Africa	1,296	1,982	1,523
Middle East	1,045	2,978	2,518
Latin America	1,167	1,000	498
Rest of World	1,332	1,105	401

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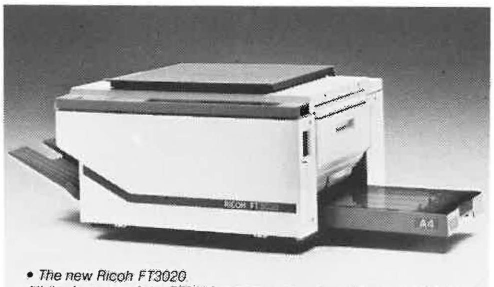

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麥理覺報告…

會員

現在又是本會徵收會員年費的時候了。爲了早點知道會員流失量及收入約數，本會每周都整理紀錄，比較今年與去年之數字。

去年本會會員流失率爲13%，引起本會高層職員相當關注。縱使經過一年之努力，會員人數仍比八二年之巔峯數字下降4.61%。每年交會費期間的平均會員流失率爲6%，我們正拭目以待今年流失率會否超出此數。本人衷心希望不會。

新辦事處

本會於海洋中心開設了一新簽証辦事處，方便九龍區出口商。對需往海洋中心十四樓政府部門領取出口牌照的出口商倍加方便。

本會於旺角香港上海滙豐銀行大厦另設有簽証處，本會中環總辦事處也處理大量証件服務。

投資

香港官方在若干主要貿易及工業組織協助下，一直在海外宣傳香港於工業及貿易投資方面的吸引力。此等推廣活動極之成功，無需贅述。但較鮮爲人知的，是外地機構也不斷在港活動，圖吸引本港資金往其本國發展。部份透過私營機構進行，部份則派代表團訪港或安排研討會，也有部份通過該國政府高層官員進行活動。本會一直以來都經常協助此等推廣活動，以回報外地曾助本港取得海外資金的機構。

本會於一九八三年錄得超過三十宗此類尋求香港資金的宣傳活動，包括中國、美國、加拿大及英國等經常向香港投資者宣傳本國吸引力的國家，也包括在這方面較少人知的國家，譬如斯里蘭卡、印度、葡萄牙、牙買加、尼日利亞、盧森堡、菲際羣島及多明尼加。多明尼加首相尤珍．查理斯女士更於五月就此目的訪問本會。

雖然部份推廣活動並不成功，但我們極想知道其中有多少是收效較大的，特別是那些一次過而非恒常舉辦的宣傳活動。

據本人所知，整個東南區中，香港是美國及日本之後的第三大投資者。美國在香港的投資也是在東亞區最大的，日本也一樣。投資是互有往來的事。

本人鑑於會員可能有興趣知道上述事項概況，故此雖與十二月會務無關，也不惜贅述一番。

勞工諮詢委員會

勞工關係聯合組織委員會將於每次勞工諮詢委員會會議之前，開會討論勞工諮詢委員會議將討論的事項，並在可能情況下先在聯合組織委員會內對該等事項取得一致意見。

此舉應有助協調各個僱主組織之意見，並避免再發生類似最近各方面詳細考慮僱傭（修訂）法案時引起之誤會。

聯合組織委員會成員包括香港僱主聯會各主要幹事、香港總商會、中華廠商聯合會及香港工業總會，另外包括由勞工諮詢委員會從上述組織中提名之四位會員，及由勞工處長從勞工諮詢委員會選出之兩名僱主代表。

貿易委員會工作

本會應阿拉伯區委員會建議，將於一九八四年二月十九日至三月六日與貿易發展局聯合舉辦一貿易訪問團往杜拜、毛斯卡特、多哈及科威特。該團有十七家香港公司參加，彼等皆有興趣在當地推銷多種消費品。本會貿易部經理馮棟澤將爲全程領隊。

本會應西歐委員會建議將於一九八四年五月組織兩個貿易推廣團往歐洲。第一團將於五月六日至二十日往法蘭克福及維也納，第二團將於五月十三日至二十七日往鹿特丹及巴薩隆娜。歐洲經濟正逐漸復甦，這兩團安排得正合時。

本會於十二月一日船務委員會會議後，以船務委員會名義去函海事處，對葵涌貨柜碼頭挖掘工程進展緩慢表示關注。海事處長戴偉已就此覆函。

船務委員會屬下之關稅常務小組於十二月二十一日開會，準備有關改善「香港船務統計（一九八三年一月至三月）」中船務統計數字舖陳方式的建議。該等建議待船務委員會通過後，將由本會呈交政府考慮。

本會於十二月十六日與港日貿易合作委員會之貿易發展工作委員會開會，討論有關雙邊貿易事宜及增加港貨入口日本的方法。本會代表爲馮棟澤。

本會應南亞太委員會建議，將於三月安排一貿易團往訪雪梨、柏斯及墨爾砵。本會已於十二月十四日發出通告邀請會員參加該團。

本會日、台、韓委員會已同意本會於三月初舉行一午餐例會，歡迎新上任之日本駐港總領事藤井先生。午餐會將於三月九日（星期一）假富麗華酒店舉行。藤井先生已允作主講嘉賓。

其他活動

稅務委員會於十二月五日開會，擬決一份有關利息豁免稅之建議書以呈交財政司。委員會建議改變稅制以增加稅收。十二月十三日本會向財政司呈交該建議。據悉財政司曾表示將就此建議徵詢中華廠商聯合會及香港工業總會之意見。本會並於十二月二十八日向財政司呈交一份有關以往建議之補充意見書。

法律委員會於十二月三日開會討論有關保安司就公司公開財政狀況作出的一系列建議。會議後，本會已將委員會對該等建議之意見呈交保安司。

英國工業聯盟獎學金遴選委員會於十二月六日開會，選出六名候選人及一名候補，七人的資料已送往倫敦英國工業聯盟，供英國方面之公司安排派位之用。

會務以外

本人謹祝全體會員在一九八四年萬事如意，東成西就。本會將竭盡所能，務求有美好的一年。 □

由「夕陽」變爲 香港的「日出」工業

本港成衣業共有九千多間工廠，超過二十六萬工人。目前美國經濟一片復甦，歐洲受美國影響也開始好轉，成衣業正帶領本港出口復甦。成衣業在一九八四年上半年的表現肯定出色，手頭訂單、工廠用電量等指標都是近年來最理想的。

不過，成衣業也受外地入口限制及本地生產問題困擾。

外地限制方面，本港成衣業被配額縛手縛脚，配額增長微乎其微。部份配額不但緊縮，且每當某類出口品表現稍佳時，外地更常施加種種限制措施。美國方面已與香港在某類產品上有雙邊限制協議，但部份產品仍不受限制，可以產生平衡作用。不過，最近美國已宣佈新措施，限制至今未受限制的成衣類別。

另外，成衣業在八四年更要面對原料價及生產成本上漲，以及昂貴的配額價格。熟練工人也嚴重短缺。

成衣業曾捱過驚險的滙率波動，目前本港成衣廠家負担的利率，常較其他地方的對手爲高。貨物要空運，也試過沒空位。

「工商月刊」訪問了政府官員及製衣業人士，探討該行業在重重困難下仍表現良佳的原因。彼等的答案（下列），顯示該行業藉著技術及適應中接受挑戰，並超越對手。成衣業在經濟不景景過後得以重生，並開始建立獨特風格。

成衣業重振的基本因素有三：

- 結構上該行業跟本港所有工業一樣，大部份是小廠，可以當下做決策，生產方面彈性大。
- 多年來成衣業已積聚了大量技術及經驗，花在物有所值的機器上的投資也不少。經濟衰退過後，消費者口味漸趨多樣化，本港製衣廠家正好利用上述之優點迎合市場需要。
- 海外市場零售商發覺售賣港產貨利潤可觀，這些成衣產品都是本港全體製衣從業員包括決策者至工人的合作成果。

香港已不再是向世界服裝市場推銷大衆化普通產品的地方，而是以合理價格，提供以消費者個人品味爲依歸的服裝。

這類服裝是頗特別的一類。消費者越來越多閒暇，活動也日漸多樣化，需要更多配合各種活動及有個人風格的衣服。香港享有的配額雖比其他成衣製造國多，但也無法完全滿足消費者在經濟復甦期大爲增加的服裝需求量。不過，在保護主義種種限制下，香港在世界市場，特別是美國，已摸索出一個中價貨市場。

貿易署副署長陳祖澤形容這是個擴展中的「曙光地帶」。目前世界成衣市場正整體變化，香港的成衣出口，好比曙光將逐漸集中、擴展。一般大量生產的成衣是「日落工業」，但陳氏指的「曙光地帶」市場，卻帶來了「日出工業」。

田元灝對本港成衣業前景非常樂觀，以上的發展正支持了田氏的看法。田氏指出，香港已成爲世界首要的成衣生產地之一，本地廠家的能力，在芸芸對手中仍將一馬當先。

銷往嶄新「曙光地帶」市場——陳祖澤

貿易署副署長陳祖澤認爲，經濟不景過後的海外市場出現了一「曙光地帶」，而香港成衣業正以領導性的獨特姿態出現。

他指的「曙光地帶」是介乎一般大衆化成衣及巴黎羅馬的高級時裝之間的一個市場。

他說香港成衣工業已脫離了「廉價工場」的稱號，目前正逐漸擺脫「抄襲專家」的形象。

他說：「香港早已被譽爲舉世最靈活的生產地，現在更漸成爲世界時裝設計中心。」

他認爲由於世界服裝水平上升，「曙光地帶」會成爲香港中價時裝成衣一個發展市場。香港的產品，反映出不景氣過後美國對成衣水準要求一直上升的趨勢。香港廠家做的，只是迎合當地的要求。

陳氏說：「新意念新設計是我們求存的不二法門。香港已在生產新設計。我們這類產品，買家不能在巴黎大量買到，在台灣及南韓也沒有。」

「現在的香港就是幾年前的日本，而台灣和南韓也取代了香港以往的位置。人人都沿著梯爬上去。」

陳氏表示，一九八三年主要受限制類別的配額使用量接近99.9%。傳統的熱門類別如牛仔褲及冷衫在九月和十月的配額使用量已達100 %。

他說：「預料一九八四年我們會用盡配額。部份受限制類別仍有增長空間，而不受限制類別也尙可增長。」

他表示八三年是香港成衣業極佳的一年。往西德及英國的配額使用量雖不及往美國的好，但已比八二年大有進步。熱門類別的配額用量也達100 %。他估計，八三年全年往西德及英國受限制類別配額使用率均會超過90%。

他說：「由於雙邊限制協定關係，八四年出口數量不會有太大增長。但香港會表現良好，並維持八三年成績。」

「製衣業增加利潤的主要方法是發展高價貨，爲『曙光市場』生產時裝。其實，自從實施配額制以來，香港廠家一直都朝高價市場發展。因此，香港已於品質、交貨信用及生產靈活性方面建立了信譽。目前買家來香港訂購的是揉合東西方風格的款式，這些設計是巴黎或羅馬沒有的。」

「買家了解我們的生產能力，知道我們有發展中的風格，也明白我們是能靈活應變的人。他們了解曙光市場在擴展，也明白這市場有利可圖。」

陳氏以一件在英國零售市場賣4.99鎊的港製恤衫爲例。他指出當地消費者雜誌選上述恤衫爲市面上最物有所值的消費品。陳氏說，在倫敦用2.5 鎊也買到一件恤衫，但眼光獨到的消費雜誌卻偏選中港製的4.99鎊恤衫推薦給英國消費者。

他指出日本對香港成衣業貢獻很大。日本供應香港大量高品質原料，在本港成衣業也有投資。

陳氏認爲，假如各國遵守國際間承諾，雙邊限制協定在八四年不會爲廠家帶來痲煩。

他說：「問題總是有的，但並非完全無計可施或不能透過協商解決。」

美國方面，即使列根總統在不受限制項目上加諸種種限制，他表示問題也一樣可以協商解決。

他指出，香港與美國的雙邊協定會有效至一九八七年。香港與歐洲共市的協議則有效至一九八六年。

目前唯一仍與香港在談判雙邊協定的國家是挪威，貿易署正嘗試與彼達成協議。

香港將於八四年中與芬蘭就新協定展開談判。多纖協定有效期會維持至一九八六年七月，目前談有關新協定問題爲時尙早。

陳氏指出美國方面傳出越來越多保護主義措施，令人憂慮。保護主義通常在大選年都會加强。

不過，陳氏懷疑美國或其他主要市場會冒激發貿易戰的危險而實施更多限制，他相信這是美國人在八四年最不願意惹上的事。 □

以速度及適應力脫胎換骨——張鑑泉

立法局議員兼利華布廠有限公司常務董事張鑑泉，形容今日香港成衣業好比如獲新生。價錢合理、品質高、速度快及適應力强等優點，已使香港躋身世界首要生產地之列。

他指出，幾個因素配合使成衣業得獲新生。

他認爲隨著世界各地教育水平上升，消費者品味也不自覺地表現出較强的個人風格。他舉了個簡單的例子証明這趨勢對成衣業的影響。

他說在一九五〇及六〇年代，人們爲順應主流，都只穿白恤衫上班。現在白恤衫已被各種顏色的恤衫取代，衫領設計及恤衫款式也變化多端。

他指出其他服裝種類也有同樣潮流，便裝尤其明顯。

强調個人風格的人通常都有較多餘暇，花在戶內戶外活動上的時間也較多，常要穿著不同類型的服裝配合各種場合。他們要添置的衣服也多起來，對廠家來說，就是需求量大增。

張氏說：「你總不能穿西裝去打網球，也不能穿跑步裝去晚宴吧。消費者現在需要的衣服比以前要多樣化很多。」

他表示，總需求量雖然上升，但保護主義某程度上限制了本港供應市場的能力。現代消費者一般都買較多衣服，廠家如要從中得益，就切忌再獨沽一味單生產白恤衫之類市場日漸收縮的品種。

香港製衣廠有見及此，早已邁向時裝及潮流變動較快的品種，因此促成了成衣業的新生。

不過，張氏仍是穿白恤衫上班的，他說自已是個保守的人。張氏身兼香港及星加坡數間製衣廠常務董事，也是五間其他不同類型公司的董事，包括香港的永安銀行以至台灣一間鋁廠。

他表示在廠家方面，成衣業重生是個逐漸衍變的過程。每位廠家都因應本身的步伐及能力，慢慢將工廠由生產白恤衫的階段發展至現有的成績。

張氏說道：「無人可以說現時的成果是買家或廠家單方面努力而成的，這其實是雙方配合的成果。」

「買家在市場上發現了機會，而廠家也願意一試這機會。買家的設計，加上廠家如何分析市場需要從而決定怎樣生產去迎合市場，這種分工配合使香港成衣業有今日的成就。通過合作，買家廠家通常都能摸索出新的產品綫。」

新產品綫的訂單通常數量少，生產時間短，交貨要快。

張氏說成衣業需要新產品綫保持活力。當今市場變化急速，廠家切忌太專注發展單一類產品，除非市場已証明該產品必受歡迎。

「配額總數是固定的，廠家不能增加單位數量。唯一可做的是改進款式及向高價市場發展。寧願賣貴價貨，也不要浪費配額在必輸的品種上。」

他强調說：「在香港玩製衣業遊戲，秘訣是盡量抓市場上會勝出的品種，越多越好。」

他說香港企業家都是「效率迷」。「過去十年來，任何稍具規模的廠家都在新器材上放下了鉅額投資。只要他們認爲一部機器能降低生產成本，他們都會買。」

「世界上只有幾個地方會爲加强工廠效率及擴闊生產能力而裝置自動化器材，香港是其中之一。但由於香港沒有重工業基礎，我們不可能自己製造這類機器。」

張氏說本港成衣業得獲新生的另一主要因素是香港人親自到各地去找機會。一方面他們找新方法改善成本結構，同時也在世界市場中找尋別人未發現的機會。

那麼，香港成衣業新生之後的前景又如何呢？

張氏說，假如我們預料成衣業不斷出現奇蹟，便是不切實際。他認爲這行業將於現有水平停留一段時期，它也需要將基礎穩固下來。

他說：「要增長就必須找新市場。日本是下一個要發展的大市場，東南亞也需要研究，中東國家可能是第三個需要較多時間發展的市場。」

香港是否應發展更多本身牌子的產

品呢？

張氏認爲香港成衣業需要的是推銷技術配合概念。他相信任何一位本港廠家本身牌子的產品都不應超過其總生產量的35%。

他說：「假如你長期只賣本身的牌子，即使生意很成功，你也會跟市場脫節。你會變得自我中心，落在潮流之後，你的整盤生意也會有危險。」

張氏認爲香港成衣業工人的確很能適應瞬息變化的市場潮流，造出各類款式。不過他認爲中國人的民族性缺乏了意大利人在製作過程中常有的神來之筆。他說即使最普通的意大利女工，在車衣的時候總是很自然的稍稍這兒變一變那兒改一改，整件衣服造出來就神采飛揚。

他說：「意大利人在製作漂亮產品方面的表達能力很強。中國民族就沒發展出那種豪放。」

張氏說台灣及南韓正逐漸追上香港成爲成衣生產中心。但他們的缺點在於工廠基本上仍是大量生產及聯營式的組織。」

「組織結構問題使他們對多變的世界市場面貌反應得很慢。他們本身並不像香港廠家般是眞正的企業家。」

「香港的優點之一，是我們有這麼多小公司，每個老闆都可以作主。大機構卻要有很多規矩守則。結果就是我們在決策反應方面處處比南韓台灣廠家快。」

張氏形容日本在急速變化的成衣業競賽中已遭淘汰。

他認爲香港廠家應繼續去了解其他民族的價值觀念，他們對方便舒適的生活有何要求，還要知道他們對社會經濟發展的期望。總之，廠家必須了解影響消費者的動力。

他舉例說，美國人較歐洲人較能接受各種不同的款式及意念。但他認爲歐洲人在顏色配搭及甚麼場合該穿甚麼衣服的學問上，則比美國人較有個性。

他說：「歐洲人對款式的要求比美國人保守。歐洲人是較妥協的。」

張氏指出他的工廠生產針織品往北美，牛仔褲往歐洲。他說他的產品也反映出兩地不同的消費品味。 □

香港躋身世界先進生產地前鋒——田元灝

立法局議員田元灝認爲，只要人類一日仍穿衣服，成衣業一日都會是香港的首要工業，而在世界先進服裝生產地之中，香港將仍是先鋒之一。

田氏指出：「十年前，人們說電子業會凌駕製衣業，又說南韓與台灣會趕上香港。現在，他們卻說香港要担心的是中國。但只要回顧一下過去十年的發展，就會發覺我們一直都比任何對手都進步得快。我們是進步的，是世界一流的。」

「我們擁有英國還未有的電腦輔助設計和激光裁剪。我們率先使用永久摺折技術。」

「看看現在的情況：買家看見我們爲其他顧客造的款式，於是來向我們請教有關設計方面的問題，希望我們稍稍改變款式後向他們供貨。我們仍是香港的領導性工業，最大僱主及全世界最靈活的生產者。我們決意長期保持領導地位。」

田氏的語氣，十足球賽中場休息時在更衣室的足球教練，其實他看起來更像個和善的校長。事實上，他確是成衣業甚至全港工業的「校長」。

田氏是新近成立的職業訓練局主席，與新成立之工業教育及訓練署聯手工作。他也是製衣業訓練局主席，該局之下爲製衣業訓練委員會。

製衣業訓練委員會成立於七十年代，該會得以成立，田氏可算居功至偉。他當時更任主席。製衣業訓練局現已於葵涌設立訓練中心，每年培養四百名熟練工人。該會正於官塘建立另一所培養更多工人的訓練中心。

田氏本人也是製衣業大廠家。七十年代後期，大部份人士都反對財政司將稅收預先分配作製衣業及其他工業用之培訓基金（正常的做法是通過立法程序分配稅項收益給各政府部門），當時田氏卻爲預先分配法據理力爭。

他的論點是，香港如要在世界市場中能靈活應變並在競爭中領先，個別工業必須有手頭資金以添置新器材及訓練員工。一九七九年工業多元化報告書終以妥協方法解決了上述問題。

報告書建議成立一政府津貼之職業訓練局；而已有訓練中心的成衣業及建造訓練機構則分別提升至局的地位，有權抽稅作爲訓練委員會經費（成衣出口每一千元抽稅三毫）。

關於以上兩項措施的效果，田氏認爲：「身爲職業訓練局及製衣局主席，我認爲兩者的效果都很好。不過，製衣業訓練局受政府辦事程序的影響較職業訓練局少，因此，製衣業訓練局有時會較後者的進度較快。」

「工商月刊」更就下列問題徵詢田氏意見：

問： 部份製衣廠商埋怨很難請到年輕的新人。另一方面，失業情況目前仍然存在。閣下認爲新人短缺是否有特殊之社會經濟因素？

答： 本港所有工業都有人手不足問題，並不單是製衣業。我想原因有二。第一，越來越多年輕人在中三以後繼續升學而不是直接投身工業，雖然日後也一樣會回到工業界發展。這其實是阻延了生產力。第二，一九八三年成衣業增長了25%，對年青工業勞動力需求的增長額，已超乎本港社會年輕人口所能負担的數量。因此，本港成衣業漸趨自動化，僱員人數減少。失業的大部份是建築工人，他們不適合從事製造業，對其他工業幫助也不大。

問： 閣下對成衣業工人短缺問題的嚴重性有何個人意見？長遠來說有何意義？

答： 工人短缺已是十多二十年來的老問題，也是促使今日有人力培訓這回事的原因之一。目前大部份廠家鑑於政府已成立製衣業訓練局及葵涌訓練中心，廠內都不設培訓設備。葵涌訓練中心每年訓練約四百多工人，該中心雖未解決工人不足問題，但每年卻塡補了四百名空缺。在官塘的第二間訓練中心將於八四年初落成，訓練人數會比葵涌中心稍多。

製衣業工人以女性爲主。女工婚後通常繼續工作，但第二個孩子出世後通常都會辭工。

問： 人口預測數字顯示，未來香港適齡的工業勞動人口會越來越短缺。閣下有否詳細數字可說明這問題？

答： 我們指的是十五歲及以上的年齡組別。如果我們不想工業人力短缺，教育政策就必須使部份學生願意投

身工業，而不是單考慮投身商業及服務業。年輕人不願意從事工業工作的危機是存在的，教育政策必需審慎考慮。

目前約七成半中三畢業生會升上中五。不獲派津貼學位的學生通常會自己找學校。然而很多中五學生的表現都証明他們不是讀中五的料子。與其如此，不如中三後就接受工業訓練，然後投身工業界。

問：職業訓練局有否就此問題作出政策性建議？

答：製衣業訓練局最近進行一項人力調查，報告正在草擬中。職業訓練局及製衣業訓練局正討論調查結果。二者都不會拖延處理有關問題。

問：至目前爲止施行了甚麼措施？

答：我們很快會有兩所訓練中心，培養操作衣車及針織機工人。另外也鼓勵機械維修人員參加學徒訓練計劃，往工業學院上課。

我們考慮過人力調查結果後，會就培訓需要製訂政策。製衣業訓練局會負責製訂訓練工人生產技術的政策，由訓練中心執行。職業訓練局會就近幾年來工業學院課程的狀況，檢討學徒訓練需求。工業學院的課程，其實也是職業訓練局推行的政策之一。

問：經濟不景過後的成衣訂單，要求廠家有更大的適應力和靈活性。職業訓練局是否會參予加强本港工人在這方面的特色？

答：肯定會。職業訓練局必須設法令成衣業保持靈活性，並適應新需求與新技術。其實訓練局的成績已算不錯了。香港畢竟是世界主要成衣出口地之一，五個名牌牛仔褲都是香港——不是美國——廠家造的。

問：職業訓練局最近聘請了一位工業教育顧問。工業教育是否需要顧問呢？

答：不。製衣業訓練局及訓練委員會就是最好的顧問。兩者的成員都是工業界人士，他們比外來人掌握更多行內知識，幾個工業聯會的主席都是成員。海外買家也來港請教我們有關款式設計問題。

問：香港是否已採用電腦輔助設計？

答：本港成衣廠正逐漸採用電腦輔助設計。約十年前我在美國看見電腦設計及激光剪布。當時這類機器約值一千萬美元，我負担不起。兩年前價格下降至二十五萬美元，我決定不用再等。現時電腦輔助設計及自動剪布已廣泛應用在繪製圖樣及製作樣板方面。

我們應設立有這類器材的中心供小廠家應用。電腦輔助設計並非香港第一次採用先進技術。譬如永久摺折技術，香港就比其他地方早很多採用。

問：高等教育對成衣業有何貢獻？

答：理工學院培養技師及大量技術員。兩間大學則提供管理人材。 □

便裝帶動出口表現

一九八三年本港出口成衣大幅復甦，便裝訂單佔大多數。大部份廠家預料便裝於八四年出口表現將仍處領導地位。

便裝的配額是最多的，在海外零售市場的款式潮流也變得很快。便裝布料以色彩鮮艷爲主，單調的牛仔布已不比以往受歡迎。便裝布料有棉、純人造料或二者混合。

「工商月刊」訪問了一位知名的便裝中型廠家，評述本港便裝業於八三年之表現及八四年展望，該位廠家不願公開姓名。

該廠家表示他在香港有兩間製衣廠，每間僱用二百五十名工人；另在台灣有廠一間，工人一千九百名。

他表示香港輸往美國之棉質產品配額比台灣多，但台灣的人造料產品配額則較香港多。因此他在兩地都設廠生產。歐洲共市配額法則沒有像美國般把棉質與人造料分開計算。

台灣由八四年開始已改變了配額分配法。進行這訪問時該位廠家表示尚不知詳情，且不能肯定八四年台灣出口的展望。

他指出，雖然八三年訂單情況要至第二季才好轉，而生產方面要到第三第四季才進入高峯，但八三年仍是他名下各廠破紀錄的一年。

他預料八四年業績起碼能維持八三年水平。目前手頭訂單已足夠他各廠今年頭六個月全力生產。

他表示八四年市場需求量視乎兩點。一方面要看美國買家入多少貨以補充經濟衰退年間銷出的貨品，這是八三年訂單的主要來源。另一方面，需求量也視乎零售生意是否持續上升或下降。沒人能預知這兩點因素的走勢。

不過該位廠家認爲，既然他手頭已有六個月訂單，他實在有充份時間觀察情況，待八四年下半年見機行事。

他解釋說，廠家要求的利潤通常是訂單價值的10%，不過實際是否能賺到這個比率則視乎需求而定。市道差的時候，爲求維持開工，也會不惜將利潤壓至5%甚至收支僅平衡的水平。

他說八四年配額不會增加。由於生產成本上升，廠家如要保持利潤水平，必須加强便裝品質及提高工廠生產力。品質及設計可增加產品值，這是廠家及買家都歡迎的。

他表示，香港比任何其他生產地在迎合買家對新設計及品質的要求方面都更靈活。香港正通過生產更多時款成衣証實本身的能力。

買家在目前世界市場逐漸復甦的情況下非常謹愼。他們要求廠家在短時間內交貨，訂單都是少量的，買的都是新款式，生產時間要短，交貨要又快又可靠。

正因香港能滿足海外需求，本港廠家與買家本國廠家的競爭越來越强烈。外國對本港施加的壓力，從日益增加的限制政策及種種醞釀中的保護主義措施可反映出來。

不過，香港必須適應海外市場不斷變化的需要才能生存。而面對嚴重的熟練工人短缺問題，香港必須提高生產力。本地廠家生產力其實已有增加，因此才能負担較高的工資吸引更多工人。

現在的問題是肯入行的新血不夠。自從九年免費教育實施以來，家長都希望子女能讀完中學，投身其他行業發展。在這種情況下，製衣業面臨新挑戰。它必須投資在生產力高的貴價機器上，而要操作此類機器，廠方必須以適當的薪酬聘用教育水平較高的工人。

這趨勢正加重廠家的開支。比方說，一部普通單針步衣車只費一千五百至二千元，但一部Juke牌單針步衣車連自動修剪配件則費六千五百元之多。自動車袋機還要貴得多。

廠房面積在一萬至一萬五千平方呎之間的小廠不一定能負担這種開支。部份小廠即使有直接訂單或大廠發給的包工承造單，也因此而被逼清盤。

他解釋廠家的開支部份是料價，部份是剪車修工序的開支，另外就是買配額的支出。他說八四年所有價格都會高企。

便裝布料的主要來源地是中國、日本、意大利、南韓、台灣及本港紗廠。由於大部份本港廠家產品都沒有本身牌子，原料存貨通常不多。一般習慣是有

訂單才直接或經原料商買料。從海外買料均以美元或其他外幣交易，在本港買料則以港元計算。

該位廠家表示八三年棉紗價格上升了12至13%，布料以美元計則上升了10%，以港元計更上升30%。高利率及滙率波動使買料的風險很大。

廠家為了符合訂單需求，無論當時利率及滙率水平如何也要買料生產。但究竟有沒有錢賺則視乎利率及滙率水平，而兩者都非廠家所能控制。廠家也不可能準確地預測訂單的未來趨勢而預先買料。

他指出，根據有回答統計處問卷的成衣業公司顯示，八三年第三第四季種種業務問題當中，排第一位的就是滙率波動引起的惶亂。第二位是原料價高，第三是利率高，第四是工資高及配額貴，第五是其他入口限制。

他說八三年漲價最少的布料是牛仔布，反映需求下降。不過，即使如此，牛仔布以美元計也升了4%。

配額價格也反映了八三年配額需求上升。年中時熱門項目如長褲就升至每打二百五十元，八四年長褲配額大約為二百五十元高峯的60%。

八三年首季棉褲配額約為四十至五十元一打，目前已升至一百五十元。八三年首季輸往英國的棉褲配額為三十元一打，現已漲至七十至八十元。往西德的同類配額本為六十元一打，目前已值一百二十元。

目前所有敏感類別配額價格增長的百份比大致與棉褲相同，雖然個別品種配額價水平不一。配額價反映了八四年的市場需求走勢。

不過，實際情況中的生產成本結構有時會被其他因素及無法預料的情況左右。譬如說，出口商是否有錢賺，要視乎生意發票是以港元或美元計算，同時也要看接到海外訂單後的滙率走勢。

另一方面，萬一交貨失期，縱使不是他出的錯，買家也會爭議。如果布料是中國來的，廠家交貨時可能會有麻煩，買家也可能會索償。

買家也可能因其他技術性因素取消訂單。不過由於成衣業目前是賣家而非買家市場，因此這種情況現時絕少發生。

他預料八四年假如買家需求繼續上升，布料價格將進一步上揚。但他認為加幅不會像八三年下半年急速。他預料八四年運動裝價格會上升10至15%。

他覺得很多本港廠家都不願出口往日本，雖然日本並無配額限制。他舉例說，日本買家買的即使是牛仔褲，也要求和服的質素，卻又只肯付要求較低的其他海外買家所付的價錢。

他說本港廠家因此而寧願賣給其他市場，既省點功夫又多賺些利潤。要滿足日本買家的指定要求往往極花時間。

日本成衣工業不及香港靈活。勞工短缺加上工資昂貴，逼使日本廠家進行比香港大規模的自動化。他們需要比香港廠家一般接到的海外訂單大很多的生意，才有利可圖。□

工人將逾三十萬

製衣業訓練委員與政府統計處於一九八三年九月就製衣業人力需求進行調查。調查結果仍未發表，但據所得資料，僱主報稱之職位空缺預料將超過二萬五千個，佔當時269,810名製衣業總勞動人數的10%。

製衣業工人受僱於行內三十一個主要職位，根據技能等級之分佈如下：

技能等級	男性	女性	總數	佔總勞動人數百份比
技師	3098	429	3527	1.3%
技術員	10712	4868	15580	5.8%
技工	5529	4225	9754	3.6%
操作工	36629	167840	204469	75.8%
非熟練工人	13357	23123	36480	13.5%
總數	69325	200485	269810	100%

男性佔總勞動人數25.7%，女性佔74.3%。

八三年九月，每個技能等級中僱員最多之兩個主要職位為：

技能等級	職位名稱	工人數量
技師	生產經理	2148
	業務經理	1027
技術員	生產組管理員	7306
	生產部監督	2905
技工	車衣教導員	4956
	裁剪圖設計員	2448
操作工	平車車工	97535
	特種衣車車工	38549

行內約僱有一千四百名受訓者／學徒。以技能等級計算之分佈如下：

技能等級	受訓者／學徒數量	佔同一技能等級總人數之百份比
技師	3	0.09%
技術員	205	1.30%
技工	97	0.10%
操作工	1110	0.50%
	1415	

僱主相信，訓練一名技術員需時兩年，技師四年，技工三至四年，操作工半年以下。

各技能等級空缺情況如下：

技能等級	空缺數目	佔同一等級總人數之百份比
技師	31	0.9%
技術員	126	0.8%
技工	158	1.6%
操作工	23657	11.6%
非熟練工人	1139	3.1%
	25111	

至八四年九月，預料製衣業人數會增長11.3%，超出三十萬。屆時各技能等級之分佈可能如下：

技能等級	預計八四年九月之工人數量
技師	3575
技術員	15944
技工	10072
操作工	232513
非熟練工人	38087
	300191

技師級當中（生產經理、品質控制經理、時裝設計師、業務經理及發展／工程經理），約五百五十人月入7,000元以上，七百五十人月入5,501元至7,000元，一千四百人月入4,201元至5,500元，而六百三十人月入在3,201至4,200元之間。

技術員級（管理員、聯絡員、督察及業務員）大部份月薪都在2,500元至3,000元之間。操作工級主要入息水平在2,001至2,500元之間，及2,501元至3,200元之間。這包括裁剪圖設計員及操作工教導員。

操作工月入在1,500元至2,500元之間，不過也有三萬八千人以上月入超過3,200元。大部份非熟練工人（超過三萬六千人）月入在1,500元以下。有三份一非熟練工人月入較多。

整個勞動人口中有三萬六千人月薪在1,500元以下；八萬四千人月入達2,000元；八萬三千人月入2,500元；五萬人月入3,200元；一萬二千人月入4,200元；三千人月入5,500元；超過一千人月入達7,000元；約五百五十人月薪超過7,000元。□

十八萬名女工操作十五萬部衣車

香港成衣業工人以女性爲主，約有十八萬女工於超過九千間製衣廠工作，操作十五萬部衣車。

大部份工廠都是僱用二十至二十五名員工之小型工廠，通常是包工承造廠或生產簡單成衣如T恤及有墊料服裝。製衣業總勞動人數爲二十六萬一千人，其餘的八萬，大部份爲男性管工及剪布工人。其他男工爲無熟練技術的臨時工人，只做粗重體力工作。

車衣女工平均年齡在二十五歲至三十五歲之間，有中三程度，通常與丈夫住在工廠附近的公共屋邨。孩子由她的母親或婆婆照顧，她自己一周工作六天。不過，如果有了第二個孩子，她通常就會放棄工作。

製衣女工平均月入一千五百至一千八百港元，薪金逐日計算，不過總收入也視乎生產量。通常她將錢放入銀行存摺戶口，提款則利用電子柜員機。

假如她的丈夫有一技之長的話，家庭總入息大概會在四千五百至五千元之間。她的生活方式是典型公共屋邨式的。由於屋邨租金較廉宜，她手頭的閒錢較一般人多，跟其他屋邨住戶一樣，她屬於特別受惠的一羣。大部份屋邨住客都不喜在衣著上花錢，部份住戶更儲蓄及投資。

他們平常穿著的T恤牛仔褲，在香港都是很便宜的衣服，部份人認爲吃頓好的中菜就是生活享受。他們上茶樓的次數比一般人多。他們家中都有電視機、雪柜及大部份一般家庭電器，不過，由於屋邨電荷問題，通常都沒有冷氣機。

較大型製衣廠通常都能吸引行內最優秀的女工，提供的福利包括廠車接送及津貼飯堂膳食。部份女工更能往中國旅遊或參加其他數日的旅行團。

大製衣廠女工的薪金比其他行業高，唯一例外是電子廠。電子廠人工比製衣廠多，聘請的工人年紀較輕，且眼力一定要好。

二十五歲至三十五歲的工人通常不喜歡做要用顯微鏡的工作。不過她們是熟練工人，而且由於薪酬是件計，所以速度也很快。

由於女工身處開放社會，即使無需像中產人士般要在衣飾上充撑場面，然而在傳媒影響下，她們對時裝也感興趣，促使女工有興趣、也能適應新款成衣的縫製工作。經濟衰退過後的海外訂單越來越以潮流爲尙，上述特點使本港在爭取訂單方面競爭力特强。工人方面也不受社會或其他硬性劃定工作性質的勞工組織限制。

有人認爲車衣女工如安於其生活方式，應比年齡相若的女教師富有。女教師每月可賺三千多元，但教師的身份和地位要求她在衣著、租金、交通方面花費較多。

不過，車衣女工假如違反法律規定不配戴衣車護指套，就時刻會有利針穿指的危險。勞工處首席工廠督察總監葉玉麟表示，每年約有二千宗類似意外發生在使用電剪的男工身上，因此引致斷肢的意外，每年約有幾百宗，部份傷者失去指尖甚或其他部份。

葉氏的專長是職業安全。他認爲大部份意外都是由於工人的心理因素，跟多勞多得的動機無關。他說熟練工人有時覺得護指套是不切實際的「新丁」才會用的。葉氏說：「我們很難說服一個多年來不戴護指套也沒事的工人。其實他們只需幾天就可以習慣護指套，熟習之後，速度也不會受影響。」

他表示，勞工處較有信心在年輕一輩製衣業成員中減低意外數字。年青人比年紀大的熟練工人較肯接受安全措施建議。熟練工人對各種安全措施宣傳大多左耳入右耳出。他們有時認爲，既然多年來不戴護指套也能安然渡過，就証明自己有本領防止意外發生。

葉氏解釋，勞工處相信通過電視、電台、戶外娛樂節目及多種媒介表演，作深入宣傳，可加强公衆對工業安全的意識。「我們用漂亮的面孔演出各種如郊遊之類的開心活動，務求表達的訊息是，如果想活得開心，就勿做使自己受傷的蠢事。」葉氏說道。

勞工處也安排訓練課程，指導各行從業員有關工業安全的方法。勞工處主任並親往職業訓練學校、工業學院及學徒訓練班宣傳工業安全，安排工業安全講座、電影放映或整系列的深入講座。

勞工處更定期檢查工廠。該處督察更在工廠內就地訪問工人及工廠管理人員，有關防止意外及提高安全標準問題。一旦發生嚴重意外，如涉及死亡及引起社會關注的工業意外，勞工處更會根據法例提出檢控。

葉氏指出，製衣業應用大量衣車，就衣車數目來看，本港製衣業工人的工傷率並不高，排在建築業之後。製衣業工傷甚少造成終身殘廢，更絕少致死。 □

市區重建典型例子

灣仔是全港人口密度最高的區域之一。一直以來，灣仔給人的感覺，是個擠得密密麻麻的商業住宅區。不過近年來情況已有變化。根據一九六一年戶口統計，灣仔人口為十八萬四千人，而一九七六年戶口統計則顯示，區內人口減至約十二萬四千人。人口下降，是由於住宅樓宇佔地率降低，及因部份住宅樓宇改建為純商業及其他用途。

灣仔近十年的發展，可追溯至政府早於五十年代頒佈之市區重建計劃。一九六九至七一年間，港府劃出四個環境改善區，分別為上環（包括西營盤）、油麻地、大角咀及灣仔。

早期的灣仔，大部份樓宇為戰前唐樓，六十年代初期開始廣泛進行高密度樓宇重建工作。至七十年代，灣仔始具現有之規模，期間發展最快的是商業住宅混合區。據城市設計處資料顯示，灣仔商住區主要可分為兩部份：

● 舊區

此區以軍器廠街、高士打道、波斯富街、禮頓道、摩利臣山道、灣仔道及莊士敦道為界。

自從二十年代灣仔塡海區伸展至現有高士打道以後，五十年來此區已發展成一高密度之住宅、娛樂、購物及服務地區。

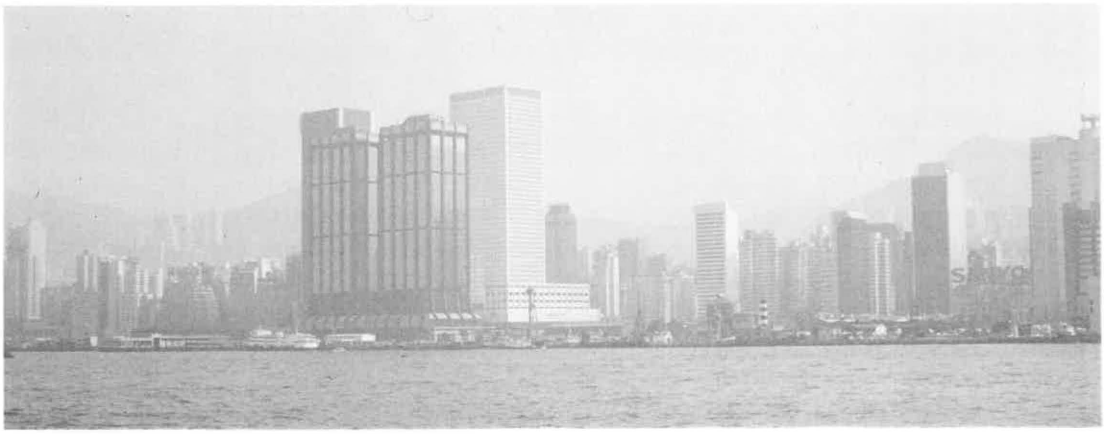
● 新區

在高士打道以北之港灣道一帶新塡海區已劃作商住混合用途，興建全新之辦公室及住宅樓宇，吸引投資人士。

新塡海區面積為7.6 公頃，約於一九七四年開始物業發展，佔城市設計委員會繪製之灣仔計劃大綱草擬圖126.18公頃總面積之6％。至於新舊區合計之商住混合用地則為26.74 公頃，約為灣仔分區總面積之21.19％。

據地政署市區拓展處城市規劃師郭自由表示，新塡海區是個規劃相當完善的地帶，發展工程有五部份：

● 鷹君中心及海港中心
● 華潤大厦
● 灣景中心
● 新鴻基中心
● 政府用地，包括興建市政局



運動場、文娛康樂館、展覽館、行人專用花園平台及巴士總站等。

關於寫字樓由中環遷移往灣仔的問題，郭氏表示，無論從城市規劃學或實際角度看來，任何流徙的現象最終都受經濟及社會因素影響。「幾年前地產興盛，中環租金直線上升，當時商界人士將寫字樓遷往較便宜的灣仔新商厦是可以理解的。」其實遷往灣仔的何止私人企業，就是郭氏隸屬的城市拓展處，也是座落灣仔海旁的海港中心。

「近來中環租金普遍回落，灣仔區部份新商厦為了防止寫字樓回流中環，不惜壓低租金與中區競爭。由此可見，城市發展是動態的，迅速反映最新經濟動向。」

「香港是商業社會，實際的用地發展常受市場力量甚至投機因素左右。因此，政府的城市規劃工作，只可列出最基本的土地用途限制條款，及建設基本設施如交通、道路、休憩空間等。」

港灣道一帶交通方便，是吸引投資人士的主因之一。郭氏估計未來幾年該區新厦全部入伙後，行車量將大增。目前接駁港灣道東行往銅鑼灣的只有馬師道，西行往中環的只有菲林明道，屆時將不敷應用，特別是一九八七年展覽館落成後，情況會更嚴重。郭氏指出，工商署正因上述原因研究該區未來交通狀況，並提議增加接駁往東西兩邊的交通點，疏導車輛。

公共交通方面，地鐵公司將於柯布連道設車站，並考慮建架一行人天橋系統直接通往該區。更令人興奮的，是政府刻下正研究一龐大之行人天橋計劃，以灣仔為中心，西至中環，東至銅鑼灣，屆時行人將可利用天橋步行至東西兩區，暢通無阻。

據郭氏說，自從港府將灣仔納為四個環境改善區之一後，已完峻的重建計劃已達七成，目前剩下的都是政府團體及社區用地，包括重建修頓球場、家計會會所及數間流動小販市場等。

郭氏指出，灣仔新塡地是該區最後一幅塡海地，在可見的將來也不會有類似的大幅土地供發展。不過，地政署已委託顧問公司完成了一份簡稱 SHRUG 的報告書，研究全港未來市區發展和塡海工程的可能性，以及本港未來因人口增長帶來的可用地問題。據預測，灣仔區到了一九九六年人口將增至十七萬四千人，屆時該區又將出現一番新面貌。□

新海旁商業區

聳立灣仔新塡海區的新鴻基中心，爲寧靜的港灣道平添一番熱鬧新氣象。四十六層高的新鴻基中心爲新鴻基地產發展有限公司的物業，其中五層爲新鴻基公司寫字樓，其餘的商場及寫字樓舖位全供出租，租出率據稱已超過九成。

新鴻基本是租用中區康樂大廈作總辦事處的；一九八一年，新鴻基中心落成，公司便由中環遷往灣仔現址。據新鴻基地產發展部經理陳鉅源表示，當年遷往灣仔，是因中環租金太貴，加上該公司早於一九七八年左右已買下新鴻基中心現址的地皮，計劃發展高級商用樓宇，移船就磡是理所當然的事。

陳氏表示：「兩年前康樂大廈市價租金高達每平方呎三十元；我們的寫字樓由於舊租約關係已較便宜，但每平方呎仍要二十元左右。」比較之下，一九八一年剛落成的新鴻基中心每平方呎租金只是八元，八二年也只升至十七元，而目前已回定至十二元左右的水平。

除了租金問題外，新鴻基於一九七八年購入港灣道地皮發展尙有其他考慮因素。陳氏指出，灣仔新塡海區的吸引力，在於毗鄰中環，交通方便，加上有優美海景，對有意擴充寫字樓的公司非常吸引。基於上述有利因素，該公司以一億四千萬元投得該幅面積五萬三千平方呎之地皮（每方呎約二千六百元）。連地價在內，整個新鴻基中心發展計劃共耗資二億元。

事實証明該公司估計正確。新鴻基中心落成後共分三期推出。第一期之低層單位於一九八〇至八一年間推出時，適値寫字樓單位短缺，中區租金高企，且很多公司需要擴展，因此反應理想。第二期推出之中層單位及第三期高層單位之租出情況據稱也越來越好。陳氏認爲，近期遷往灣仔的公司，主要是因爲該區可以提供寬敞的大型高級寫字樓單位，租金因素已淪爲次要。現時座落新鴻基中心的大小寫字樓不計其數，較著名的租客有陶氏化工有限公司，Caterpillar Far East Ltd，甚至香港政府等。

新鴻基公司於灣仔塡海區的商業樓宇投資尙有剛入伙的海港中心及毗鄰的鷹君中心。前者爲該公司與其他地產商聯合發展之物業，後者則爲鷹君公司之發展計劃，新鴻基擁有部位。據陳氏說，海港中心的租出率已達九成以上，反映出高級寫字樓單位的市場需求仍大。

香港置地有限公司行政總裁戴偉思於十二月擧行之香港會所大厦平頂儀式致詞時表示，寫字樓遷離中區的趨勢，已因中區租金普遍回落而停止。另一方面，香港貿易發展局卻打算於八四年初由康樂大厦現址遷往鷹君中心。雖然貿易發展局的例子未必有普遍意義，但這是否也反映出，今後的灣仔商業中心將繼續擴展，與中區爭一日之長短呢？

陳氏表示，單從租金著眼很難比較兩區，因爲決定寫字樓租金的因素很多，包括地點、交通、視野、環境、樓宇質素及管理水準等。

陳氏說道：「照目前情況看來，灣仔海旁的商業中心極可能跟中區融合成一個龐大的中央商業區。中環與灣仔之間的接駁地帶已出現海富中心等商業大厦，而快將落成的香港會所大厦亦靠近東區，兩區的距離會越拉越近。」

談到今年的租金走勢，陳氏認爲目前寫字樓供應充足，租金可維持平穩。不過，由於建築成本高昂，他預料租金不會因新商厦陸續落成而下跌。

陳氏說：「寫字樓單位經過兩年多來的市場消化後，預料在八四年下半年會逐漸好轉，屆時租金可望上升。」他又補充，本地經濟表現是影響寫字樓單位市道的最主要因素，今年內香港在貿易、出口及旅遊方面應有良好表現；中國方面，南海油田發展及中英會談極可能有進一步好消息公佈等因素，加上美國經濟持續好轉，本港地產市道應可樂觀。

陳氏認爲，灣仔新塡海區近年來的發展是非常特殊的。跟尖沙咀東一樣，二者都是全新的大片空地，可作整體的大規模發展。灣仔以外，港島暫時已不再有偌大的新塡地可作類似發展。灣仔海旁商業區，可算是本港近年商厦發展的一支突起異軍。 □

蘇絲黃也認不出這地方了！

入夜後的灣仔，燈紅酒綠，別有風情。灣仔的酒吧業是有名的，「蘇絲黃世界」這部五十年代的暢銷小說，爲灣仔的酒吧事業抹上浪漫的文學色彩。三十年後的今天，灣仔已是面貌一新的商住區，蘇絲黃要是舊地重遊，可能也要驚歎灣仔的快速變化。

「工商月刊」就灣仔酒吧業的最新面貌訪問了灣仔警署牌照部吳徐鳳英女士。據八三年十二月數字顯示，灣仔的酒吧共四十一間（不計夜總會在內），集中在洛克道，特別是洛克道與芬域街交界至柯布連道一帶。

灣仔最「傳統」的酒吧，其實就是無上裝酒吧，顧客以外籍人士及水兵爲主。內部格局多是有一張長型柜枱，客人坐在柜枱前，吧女穿梭其間。但據吳氏觀察，這類無上裝吧近年來日漸式微，新開的絕無僅有，舊有的不是停業就是改裝爲中式夜總會（俗稱「魚蛋檔」）。現存的都只是規模較大歷史較久的，像 Suzie Wong，Winner Bar 等，而有名的 Crazy Horse 也一度轉爲魚蛋檔，目前更已停業。

三年前，新興的中式夜總會進入高峯，大有取代無上裝酒吧之勢。「中式夜總會和一般酒吧的分別，就是前者把場地間隔成一排排卡位。當時很多酒吧見這類魚蛋檔生意好，紛紛照樣改裝。」吳氏說道。

不過，魚蛋檔很快便沒落，現時大部份又已改爲按摩院或淸吧。吳氏表示，魚蛋檔走下坡的主因是警方嚴厲執行掃黃行動，法庭判罰的個案比率也增加，顧客因此投鼠忌器，魚蛋檔生意急速式微。

灣仔現時持牌按摩院有十間，但據估計該區未領牌而非法經營的按摩院有五十間之多，目前牌照部正處理大量按摩院牌照申請，可見這一行業正方興未艾。與按摩院差不多同期湧現的是淸吧。顧名思意，淸吧是淸飲酒的地方，沒有無上裝式的吧女招待。不過偶爾設有飛標靶給人客消遣，也有歌手演唱的民歌式淸吧，部份更供應簡單食物，近乎酒吧式餐廳。另外，有三、四間專爲菲籍人士而設備有舞池的淸吧，和幾間很多外籍少年光顧的高消費的士夠格。

吳氏表示，近年來灣仔的酒吧業已大有進步。新開的酒吧，內部裝修都十分講究，絕無破舊汚穢的感覺，即使是按摩院的環境也很乾淨，美輪美奐。分佈方面，也隨著新大厦落成而逐漸擴散。通常一幢新商厦如果地點夠旺，樓下或地庫少不免會有一間淸吧，比如摩利臣山道一帶就有幾間。不過，灣仔新塡地的商業區目前則只有一間酒吧（位於新鴻基中心），吳氏估計可能是該區入夜後行人稀少之故。另一個進步，是近年來已較少未足十六歲的少女當酒吧侍應，相信是硬性規定攜帶身份証法例起了阻嚇作用。

酒吧之外，灣仔尙有十三間正式夜總會及舞廳，六十間持牌遊戲機中心，四十九間旅館。一樓一鳳則估計有三十五至五十間。灣仔的娛樂事業是多姿多采的，潮流也變得快，以遊戲機中心爲例，八三年頭時，專爲十六歲以下少年和兒童而設的中心也有三間，但至年尾這行業的數量已停滯，黃金時代又已成過去。

芬域街一帶，仍時不時有士兵留連，不過風光已大不如越戰年代。目前的灣仔，若講酒吧數量之多，也未必及得上尖沙咀或銅鑼灣。不過，對仍然記得關南施演過蘇絲黃的一代，酒吧可能仍是灣仔最貼切的代名詞。 □

簡報滙編

歡迎新會員

本刋歡迎十一間公司於一九八四年一月份加入本會，成爲香港總商會會員。（新會員名單詳列今期英文版）。

企業管理文憑課程

香港管理專業協會與香港理工學院聯合學辦一項以中文講授的企業管理文憑課程。該項課程的目的，是爲工作上主要以中文爲溝通語言的在職及新進管理人員，及中小型企業負責人提供理論與實踐並重的現代管理訓練。

本課程採用富有彈性的學科制，參加者可按自己的進度及工作上的需要而選讀。參加者須先完成八個必修科目，然後選讀四個專題科目，方可獲頒授文憑。專題科目分市場管理、人事管理、財務管理及生產管理四個系別。

此爲本港首次舉辦以中文講授的同類課程，其最主要的優點是使慣於應用中文者更易於領悟及實踐課程的理論及實務技巧，因此本課程除爲個人提供有系統的管理訓練外，並協助應用中文爲主的工商機構培養管理專才，促進人力發展計劃。

香港管理專業協會與香港理工學院將對本課程作全面管理及控制，使其與現有的「管理進修文憑課程」（DMS）達致相等的學術水平。管理進修文憑課程以英語授課，早已獲得本港各政府部門及工商企業的高度讚賞及稱譽。

申請就讀本課程，年齡必須在廿三歲或以上，中學畢業或相等程度，必須在職而且有應用英文的一般能力。

新學期將於一九八四年四月七日開課，申請入學的截止日期爲一九八四年二月十八日。

索取章程及報名表，請塡妥下表寄香港堅拿道西廿六號香港管理專業協會聯席總幹事收，或致電㊂六四二二〇三／㊄七四九三四六查詢。

更正

本刋一月號荷蘭專輯中部份相片位置有誤。歐庭先生的相片應在六十九頁而非七十頁。華特斯先生的相片應在七十頁而非六十三頁。范德克先生的照片應在六十九頁。謹此致歉。

本會稅務委員會副主席夏利斯先生於十二月二十日舉行之記者招待會上，解釋本會向財政司提交之稅務建議。該建議目的爲補償取消港元存款利息稅後下降的稅收。委員會成員格雷夫斯先生及基禮士比先生（左）協助夏利斯闡釋該建議。圖右立者爲本會執行董事麥理覺先生及行政部助理董事葛立科先生。麥理覺指出，本會認爲該建議可避免提高稅率從而打擊目前正復甦的公司。

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