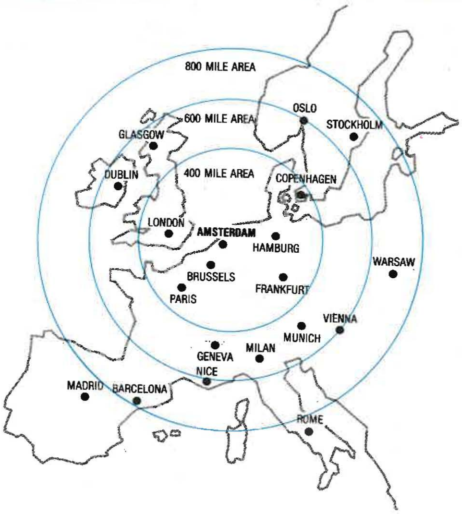
一九八三年三月號

工商月刊 THE Bulletin

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

Hong Kong's changing retail pattern

轉變中的香港零售方式



From April 1983, in addition to our Wednesday flight, KLM offers a new Boeing 747 service every Saturday from Hong Kong.

We changed our Friday flight to Saturday evening simply for the sake of your convenience.

By leaving on Saturday evening, you can have an extra day for preparing your trip to Europe.

So we do hope you'll find our new flight change to your advantage.

By Boeing 747	Wed KL802	Sat KL804
Hong Kong Dep.	20:15	20:15
Amsterdam Arr.	08:05	08:10
	Thu	Sun

For full details of KLM's new service to Europe or other information, contact your travel agent or KLM's Hong Kong office at Fu House, 7 Ice House Street, H.K. Tel: 5-220081

The Reliable Airline KLM Royal Dutch Airlines

工月
商刊 THE Bulletin
A Hong Kong General Chamber of Commerce Magazine 香港總商會月刊

March, 1983

3 **Chamber in Action**
Extracts from the Director's monthly report on recent activities of the Chamber.

Changing Patterns in Retailing

5 **Supermarkets Supply Half of Shoppers' Purchases**
The One-stop facility, either in the form of supermarkets, or chain stores in shopping complexes, has evolved with higher incomes and the quickening pace of the local lifestyle.

9 **Department Stores Keep Pace with Changing Times**
With an 8% growth rate in recent years, Hong Kong today has 45,000 retail shops of one kind or another.

11 **Hong Kong's Mr. Statistics Invites Unemployment Critics to Put Their Figures where their Mouths May Have Been**
The Hong Kong quarterly general household survey from which the unemployment and underemployment rates are derived are as professionally done as anything elsewhere.

14 **Amateurs Need Not Apply**
What credence can the public place in Census and Statistics Department Figures ?

16 **Complexities of the US Immigration Law for Hong Kong Investors**
A senior Executive of a professional trouble-shooting company reviews the difficulties.

17 **Outside Labour Helps Italy's Toy Industry**
The Bulletin's special contributor with in-depth knowledge of Italy's toy industry concludes a two-part series with a wealth of background information.

21 **In Tray**

24 **Trade in Progress**
貿易數字一覽

26 **本會動態**
內容摘錄自執行董事之每月報告。

轉變中的零售方式

27 **超級市場的崛起**
集聚式的零售方式，無論是超級市場或購物中心內的鏈鎖商店，已經演變而成，主要是由於港人收入提高及生活節奏加速所致。

29 **百貨公司與轉變時代的步伐看齊**
香港現有四萬五千家形形式式的零售商店，是近年間８％的增長。

30 **香港的失業數字**
按季計算本港失業與半失業率的香港綜合住戶統計是十分專業化的，足堪媲美世界上其他國家的統計。

32 **專業化的統計調查**
社會大衆對於統計處所做的失業調查應該給予多少信任呢？看本文自有所分曉。

33 **美國移民條例複雜**
香港投資者須留意
一家專業公司的高級行政人員評論有關困難。

34 **外圍勞工有助意大利玩具業**
本文作者對意大利玩具業有深厚認識，此乃全文之下節。前文見載於本刊八三年一月號。

36 **簡報滙編**

Published by :
The Hong Kong General Chamber of Commerce
Swire House, 9th floor, Hong Kong
Telephone : 5-237177
Chairman : J.L. Marden, CBE, MA, JP
Vice-Chairman : Jack C. Tang, OBE
Director : J.D. McGregor, OBE, ISO
Editorial Board : J.D. McGregor, OBE, ISO
Harry Garlick Maureen Wong
Graham Jenkins Liza Poon
Production : Li York Ling
Printer : South China Morning Post, Ltd., H.K.

出版人：香港總商會
電話：五一二三七一七七
主席：馬登・副主席：唐驥千
董事：麥理覺
編輯部：麥理覺　葛立科
黃慕賢　格林姆・曾健士　潘麗桃
美術製作：李若稜
承印：南華早報

Sole Agent for Advertising Instructions :
Wadsworth Media and Marketing Service Ltd.
802 Far East Exchange Building
8, Wyndham Street, Hong Kong
Telephone : 5-266843
Telex : 60418 WADCO HX
Cables : WADSWORTH HONG KONG

The Chamber in Action

Extracts from the monthly reports issued to General and other committee members by the Director, Jimmy McGregor.

Finance — Unaudited Accounts 1982

I am very glad to advise members that the final financial outcome for the Chamber for 1982 was a pre-tax surplus of $353,000. As the year was a particularly difficult one in many respects, I am personally pleased that our efforts to remain cost conscious and to improve productivity have been quite successful. We had a busy year across the broad range of Chamber activities and our improved membership income bears testimony to the service aspects of our work.

Membership

Total memberhsip at the end of January was 2,912. We promoted membership vigorously with 10 recruitment campaigns aimed at those companies using our Certification services. As a result, a total of 455 companies joined the Chamber in 1982. Another campaign in January added 48 new members to the number. These will help offset the effect of any loss of 1982 members.

Chamber Mission to Britain, 7th to 11th March

Feedback from the various British organisations assisting with the arrangements of the programme and publicity for the mission has been encouraging. We have also received good individual responses from British companies contacted directly and from Chambers of Commerce, to which we had written, expressing a high level of interest in meeting the group.

120 member companies of the Chamber have provided information on their interest in doing business with British traders and industrialists. This data is being processed and I am sure that many good new business contacts will be made during the mission.

Textiles Committee

Members of the Chamber's Textiles Committee will meet shortly to review the Government's Textile Quota Control System. Views of the members will be conveyed to the Textile Advisory Board of the Government and the Department of Trade.

Central & South America Area Committee

The Committee met on 14th January to review the present situation of Central & South America and recommended that the Chamber should attempt to organise a trade mission to that area in September/October 1983. As members may recall, a similar mission intended to visit several countries in that region in March 1983 was cancelled due to lack of interest by members.

China

Mission to China, 9th-22nd March

On the advice of the Chamber's China Committee, the itinerary for this mission was revised to include Kunming instead of Guangzhou. The mission will visit Beijing, Xi'an, Chengdu and Kunming. Details of organisation were discussed at a meeting held on 13th January.

The purpose of the visit is to establish better understanding of the business interests, investment opportunities and the further potential for co-operation between Hong Kong and China.

Mission from Beijing

The China Committee and Chamber Executives received a 16-member delegation from the All-China Federation of Industry and Commerce on 14th January in the Chamber Boardroom. Useful views were exchanged.

Guangdong Investment Seminar

At the invitation by the Guangdong Enterprises Ltd., the Industry Division organised two discussion sessions on 28th January in the Chamber Boardroom. A six-member delegation of the Guangdong Economic Commission, led by its Vice-Chairman, Mr. Zhang Feng, introduced over one hundred investment projects in Guangdong to about one hundred Chamber members attending these sessions.

Conference of the Finance & Construction Fair — China 1983

Invited by the organisers, the Assistant Director of the Industry Division, Cecilia Fung, presented a paper on "Investment in China — the Hong Kong Experience" at the Conference held on 20th January in Guangzhou. Over 200 Chinese officials from various cities in China attended the talk.

Business Group to the Middle East

14 companies, half of which are Chamber members, have confirmed their participation in the joint Chamber/TDC trade mission to visit Bahrain, Muscat, Dammam and Riyadh from 14th to 30th March. Kenneth Chiu, Manager of the Trade Division, will accompany the group and provide assistance to participants.

Trade Services

The Trade Division received a total of 44 business visitors from overseas and arranged 642 business contacts in January. The Statistical Section completed and distributed the analysis of Hong Kong's Overall Merchandising Trade for January to October, 1982, as well as processing 55 requests from members for trade statistical information. During the month, 1,030 trade enquiries were dealt with. Of these, 133 were received from the Trade Development Council. □

This is the day and age when small computers are sold on the basis of their features and functions.
And we'd be the first to admit that features and functions are important, after all, we talk about them too.
But, at Monroe, we believe there are other factors that deserve equal consideration. Because when you buy a computer you will expect it to store and maintain one of your company's most valuable assets — your operating records. In effect, you are not just buying a machine, you're entering into a partnership that will continue long after the sale has been concluded. Thinking about a small computer in this way can alter the way you think about small computers.

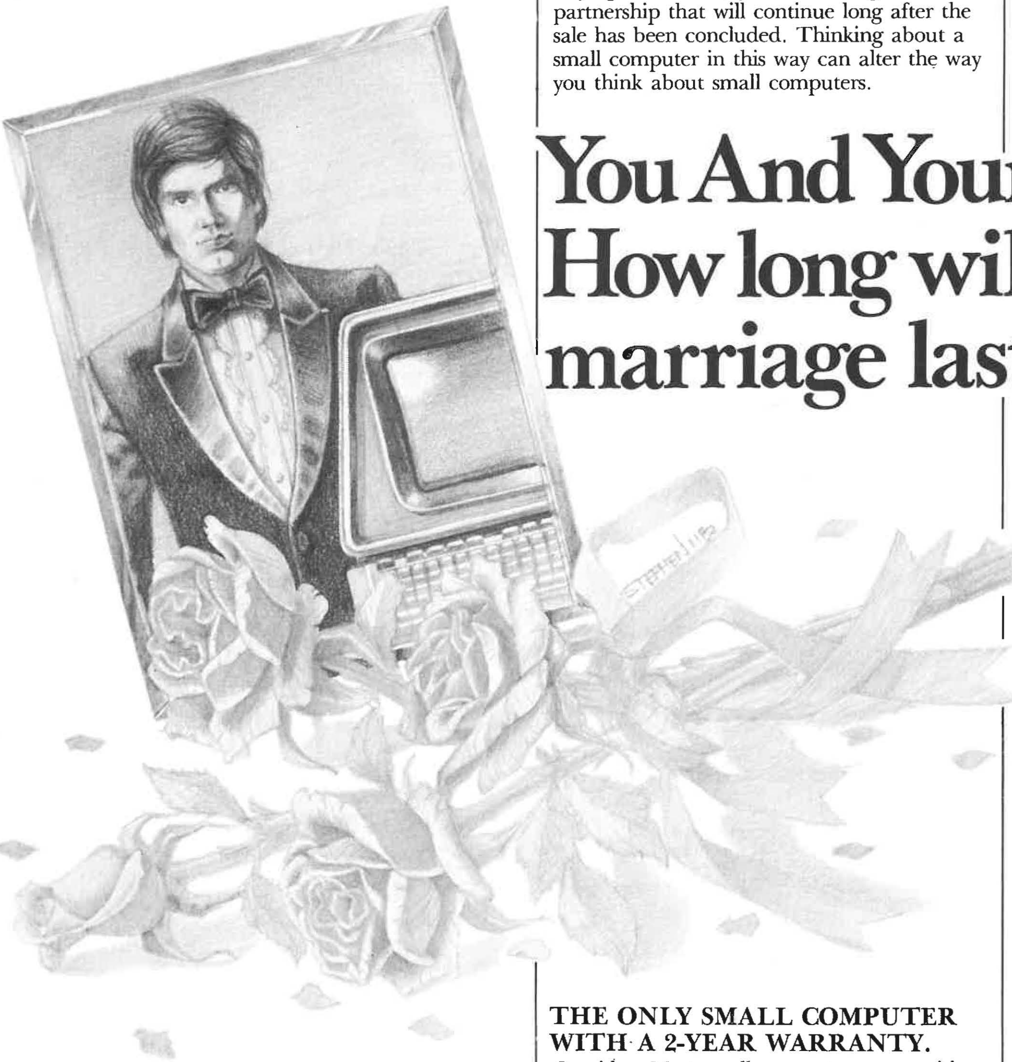
TRAINING DOESN'T END WITH FAMILIARISATION.

Consider: All small computer sales include training, but that training is usually no more than familiarisation.
At Monroe we don't consider the training complete until your staff knows everything there is to know about the operation of the computer.

IT'S CALLED "THE ADVANCED, OCCUPATIONAL MICROCOMPUTER."

The Monroe 8800 Series of microcomputers, like all Monroe products, have been designed to perform in a business environment. Their unique, Monroe Operating System gives them ISAM File and multi-tasking capabilities you wouldn't expect to find on a small computer. DOS and CP/M capability give them access to the largest libraries of shelf software, plus Monroe software. And the power and flexibility of the Monroe 8800 Series rivals that of much larger machines.

You And Your Computer. How long will the marriage last?



CALL US AT 3-851147-8

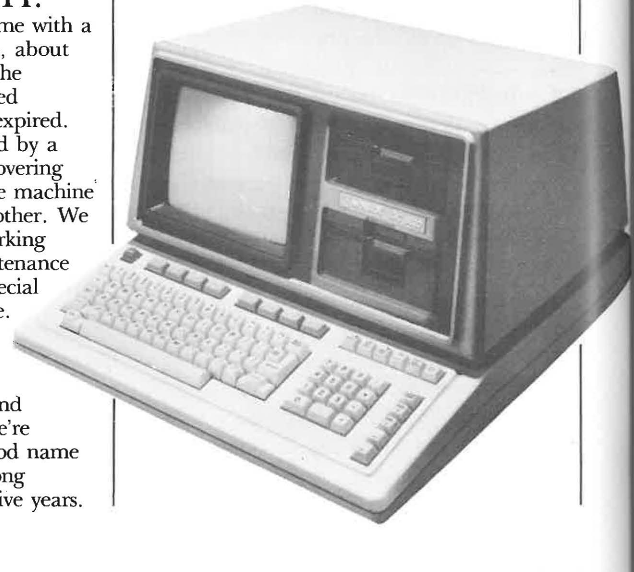
We'd like to tell you more about the 8800 Series of Advanced Occupational Microcomputers. We'd also like to tell you more about the way we stand behind every machine we sell — today, tomorrow, next month, next year, next. . . . .

THE ONLY SMALL COMPUTER WITH A 2-YEAR WARRANTY.

Consider: Most small computers come with a three to twelve month warranty. So, about the time your company completes the transition from manual to automated operations, the warranty will have expired. Monroe small computers are backed by a full, twenty-four month warranty covering parts and labour. If we can't fix the machine on the spot we'll replace it with another. We respond to service calls within 4 working hours. We provide preventive maintenance when the warranty expires. And special servicing arrangements are available.

MONROE MAKES IT. MONROE SELLS IT.

Monroe small computers are sold and serviced by Monroe staff because we're concerned with maintaining the good name we've established with the Hong Kong business community over the past five years.



MONROE
Litton Systems For Business

Monroe Division, Litton Business Equipment (HK) Ltd., Room 910, Champion Building, 301-309 Nathan Road, Kowloon. 3-851147-8.

Supermarkets Now Supply Half of Hong Kong Shoppers' Purchases

The Bulletin Looks at Changing Patterns in Retailing

The One-stop facility, either in the form of supermarkets or chain stores in new shopping complexes, has evolved in Hong Kong with higher incomes in the boom years of the late Seventies, the dramatic increases in overheads like rents and the quickening pace of the local lifestyle.
Now recession could be having its impact. Consumer choice could be changing to favour price rather than the image of the product stocked. It won't turn the clock back, but it could be beginning to change some retail merchandising techniques.

Mr. K.N. Tang, managing director of Survey Research Hong Kong Ltd., says the major change in the pattern of Hong Kong's retail sector in recent years has been the growth of the supermarket. Very few, he thinks, know the extent and importance of what has happened.

In 1975-6 Hong Kong had about 100 supermarkets. By 1978 the figure had grown to 250. By 1980 it had reached 330 and by 1983 to 450.

Numerically, the total is small compared with Hong Kong's total 16,000 food and household goods retail outlets. But when it comes to actual movement of goods the growth of the supermarket in Hong Kong is quite dramatic *(See Table 1)*.

Supermarkets are now accounting for more than half the purchases. This changing form of distribution is offering greater consumer benefits *(See Table 2)*.

Table 1

% of Last Purchases Made at Supermarkets

	1978	1979	1980	1981	1982
Shampoo	37	47	47	57	67
Hair Conditioner	—	—	46	58	69
Soap	24	41	41	53	60
Washing Powder	19	35	36	45	50
Liquid Detergent	13	30	33	42	50
Cooking Oil	11	22	26	39	47
Toothpaste	23	37	44	55	60

Source: Survey Research Hong Kong Ltd.

Checkout counters at a Hong Kong supermarket.

Table 2

Frequency of Shoppers at Supermarkets

	%
At Least Once a Week	48
1-2 Times a Month	29
Less Than Once a Month	16
Never	7

Source: Survey Research Hong Kong Ltd.

Mr. Tang says that as a result Hong Kong's more traditional form of outlet, the Chinese mixed goods shop and the grocery shop no longer are in the major role. Many have gone out of business or are leading a relatively meagre existence.

What are the consumer benefits that have induced the Hong Kong public to change its traditional buying habits?

Mr. Tang says supermarkets offer many conveniences. One is the products they tend to stock. These include easy-to-prepare or fast foods from instant noodles to frozen dim sum; from milk powder to instant coffee. The list is almost endless, even washing powders.

Another convenience is what Mr. Tang calls "one-stop". Everything the consumer needs can be purchased under one roof, where there is an open display. Hitherto, the consumer had to make several stops to buy his food and household needs.

Mr. Tang says supermarkets are generally cheaper and their stock fresher. Retail stock audits show stock movement is faster.

He says, too, the shopping environment is better. Supermarkets are air-conditioned. The lay-out is better. They look cleaner.

Mr. Tang predicts "one-stop" will extend to Hong Kong's traditional clothing, electrical appliances and personal durables (watches and cameras) stores.

We care enough to send 8 men 15,000 miles every year to select your wines.

Every year a panel of internationally recognized writers on wine, expert wine tasters and experienced Lufthansa staff travel all over Europe seeking out those special vintages fine enough to serve to our passengers. It's a lot of work, of course, but we think it's worth it.

Lufthansa
German Airlines

LH 5394-4 HKG

Shopping complex at Causeway Bay.

Fast food in a shopping complex.

Already these shops are in large shopping centres, like Ocean Centre, City Plaza and the upmarket Landmark. (that also has a supermarket).

These places offer important consumer benefits of both convenience and variety. As complexes of shops, they also tend to be highly competitive.

Mr. Tang says Hong Kong people like fun and liveliness. Other communities might like to avoid crowds. Not so in Hong Kong. The people have no fear of crowds. People tend to attract other people.

Family

Thus, the complexes are beginning to cater for the family. They are providing entertainment for the kids while the parents do their shopping.

Mr. Tang thinks both the complex and the supermarket fit the pace of life in Hong Kong. Most people, he says, like to do things quickly. In their busy lives, they lack spare time.

Market research, that seeks to find out existing and latent consumer needs, is now showing retailers what kind of consumer benefits they should offer people with these characteristics. Shopping habits are, as a result, changing to suit modern needs.

The success of firms like Maxim's and MacDonald's Mr. Tang says, illustrate the importance of the convenience factor in the changing life style.

Hong Kong, he says, is a more cosmopolitan mixture of East and West than it used to be. In certain ways it is following the American model.

But, while the setting is increasingly cosmopolitan, Hong Kong remains at heart rather traditional. Fast-food chains serve Chinese as well as Western convenience products.

Shops, nowadays, Mr. Tang says have to sell the total product. They are not just selling food or whatever; they are selling service — friendliness, speed and standards through a well-trained staff.

The product-mix for sale is also altering according to Mr. Tang. One reason, he says, is because of the growing importance of the male as a shopper. Women are still Hong Kong's major shoppers but men are growing in importance *(See Table 3).*

The reason, Mr. Tang, says is because there are now so many working wives. Household responsibilities and choices are often shared by a man and his wife. Thus retailers can't now neglect the male shopper.

Department stores are the oldest form of the "one-stop" convenience offered shoppers, Mr. Tang says. They are moving with the times and adapting to consumer buying habits. For instance, many now include supermarkets.

Department store operators, he says, don't sit back and wait for business to come to them. They are aggressively promoting and advertising. Only department stores and chain stores can afford this expense.

They enjoy other advantages. They have better bargaining power when it comes to buying wholesale. They can command better credit terms.

One development elsewhere that so far has not come to Hong Kong, Mr. Tang says, is the self-label. That is, for instance, when smaller stores get together to make their wholesale purchases and retail their purchases under a common label.

Supermarkets can also do it.

He thinks a major reason why the self-label hasn't happened is that product image is important in Hong Kong. The self-label would have to be initially supported by expensive advertising. Even then it might be difficult for it to make headway. Other markets are more price conscious than Hong Kong.

This leads Mr. Tang to another interesting observation. He says in Hong Kong income more significantly influence consumer product choice than the actual product price. It's to do with Hong Kong's relative prosperity more particularly in the later 'Seventies and its high annual growth of Gross Domestic Product.

Image

Consumers tend to buy on reputation and image. But, he says, if local incomes stop growing in the current recession then he suspects price could become a more significant factor, like elsewhere.

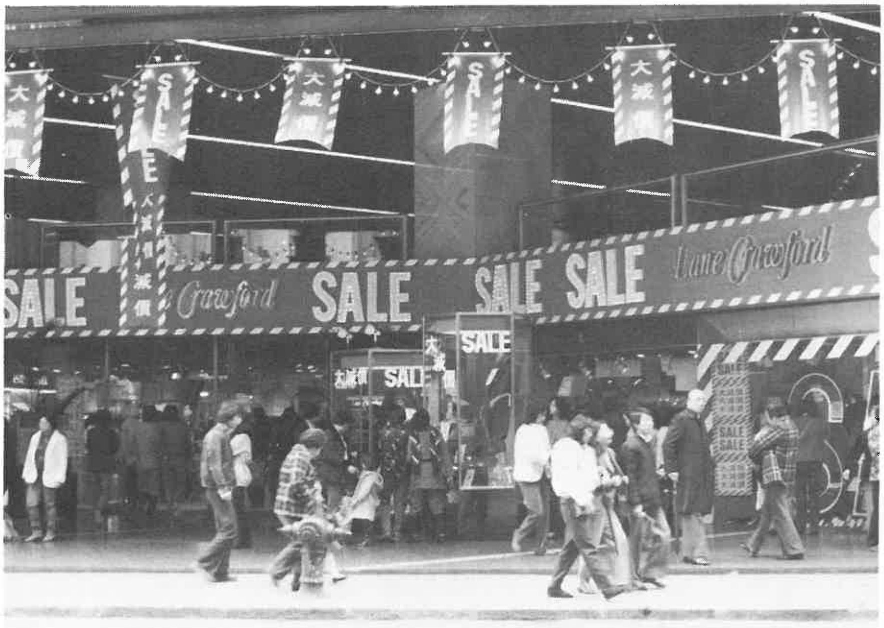
Mr. Tang says the growth of the modern retail outlet has not increased in the New Territories in the same proportion as the population shift. But, he says, he believes it will come. Now, the

Table 3

% of Last Purchases Made by Men

	1980	1981	1982
Hair Conditioner	14	17	19
Soap	15	15	21
Shampoo	14	18	22
Toothpaste	16	15	21
Washing Powder	12	13	19

Source: Survey Research Hong Kong Ltd.



Sale time at Lane Crawford department store attracts bargain-hunting crowds.

New Territories new towns are where the opportunities are, not so much for the image product but ordinary household items.

Clint Laurent, lecturer at the School of Management Studies, University of Hong Kong, says nearly 80% of the 15-64 economically active age bracket of the Hong Kong population visited a supermarket in the past four weeks. The switch has been relatively constant across all age groups except among the 50-64 year old group.

He says supermarkets now dominate the food market over the "wet" markets, i.e. the Urban Council marketplaces. This is because most households have refrigerators and consumers don't have to go twice a day to a marketplace to get fresh food.

Besides, the "wet" marketplace is not as prestigous as the supermarket. Younger housewives are compromising on traditional standards of what is considered fresh and going to supermarkets. Attitudes toward canned food have also become positive.

In other areas within the retail sector Mr. Laurent sees the mini-wholesaler (retailing in bulk by the case, etc.) as an interesting development and, of course, the growth of the shopping complex for non-food items.

He says the problem of high rents is affecting, for example, the small electrical home-appliance shop. They are having to work on ways of improving their profitability by extending the range of what they stock to other compatible products.

Besides stocking a wider range of goods they are beginning to use a slightly bigger shop or extending to more than one location.

The economics of the small shop aren't as viable as they were, Mr. Laurent thinks. Rents, labour and, indeed, all fixed overheads have gone up to such an extent the retailer has to sell a larger volume. Retailing cost-efficiency on a square-metre basis is much higher in a department store than a small store, he points out.

Sun Hung Kai Real Estate Agency recently reported there are signs that large retailers are taking the opportunity, as rents drop, to expand their outlets. It also said small traders may soon begin to take an interest again.

Mr. Trevor Farnsworth, Sun Hung Kai property adviser, says the current oversupply in shops means that buyers and tenants can afford to be more sophisticated and selective.

Shop tenants, he says, are looking for long-term leases with emphasis on shopping centres wholly-owned by one landlord. They are asking for more assurances than hitherto of a sensible tenant-mix, (that is, not more than one shop in the same goods category). This cannot be guaranteed where shops have been sold off. Tenants also now want good quality management as well as good location, price and building quality. □

The Man Who's Taking Consumer Research to China

K.N. Tang, managing director of Survey Research Hong Kong Ltd. at 39, is a good example of how academic knowlege and expertise acquired by young Hong Kong Chinese businessmen are impressively changing retail merchandising in Hong Kong and upgrading standards.

Mr. Tang sat for his masters degree in economics at the University of Hong Kong. Specialising in economic development he did his thesis in food consumption, building a kind of econometric model, relating food consumption to categories of income and price movements. He says it was a time series study.

After two years in academic research and some teaching at HKU, he joined Radio Television Hong Kong for a short period working in public affairs. He went to Survey Research Hong Kong in 1969.

Mr. Tang is a past chairman of the Market Research Society of Hong Kong and is now a member of the Consumer Council. He chairs the Survey and Research Steering Committee of the Council.

As managing director of SRH in Hong Kong, Mr. Tang looks after the company's work in Taiwan. SRH also has an agreement to do market research in Guangdong, which Mr. Tang describes as a major opportunity and challenge.

SRH employs 150 people in Hong Kong, doing research, recording data under independent quality control and analysing the data by computer.

Mr. Tang says he has had the responsibility of changing SRH from an entrepreneurial to a medium-sized firm in Hong Kong. □

Departmental Stores Keep Pace with Changing Times

Reflecting an 8% growth rate in recent years, Hong Kong today has roughly 45,000 retail shops of one kind or another.
Employment in the retail sector of the economy in the same period has shown a 6% growth rate. If this rate is projected on mid-1982 statistics, then well over 160,000 must be working in Hong Kong's 45,000 shops, compared with over 900,000 workers in Hong Kong's 48,000 factories.

There are no comparative figures to indicate whether or not Hong Kong is more a nation of small shopkeepers than Britain. But most who have seen both places agree it certainly seems so.
There is no direct estimate of the retail sector's contribution to Hong Kong's gross domestic product. The only relevant sectoral estimate includes all distributive, retail and catering services.
Taken as a whole this economic sector of activity last year produced about 22% of our GDP. Retailing alone could perhaps be worth about 16%.
But is the wealth our shops generate annually for GDP a complete reflection of their value to us all?

Daniel Koo, managing director of **Shui Hing Co. Ltd.** waxes rather philosophical and says the retail sector's social and economic value is vital. It caters for our daily needs in every material respect and produces both social and economic spin-offs.
Our stores, he says, interrelate with the life of the people, influencing living standards and social habits. The people's demands, in turn, influence the stores.
For instance, the Hong Kong customer is very demanding about one thing — his time. His lifestyle is fast. He gets impatient if buying interferes with his daily routine.
Mr. Koo says the Hong Kong people are not just as dynamic as any on earth but they are also becoming much more knowledgeable. They want their dollar's worth. They cannot be taken for a ride any more.
They know what they are getting and they know precisely why they want to buy what they do buy.
Mr. Koo says shops play an important role in improving Hong Kong's productivity. When a new shop opens for example in a housing estate, he says, it generates a certain amount of local excitement and curiosity, especially if the new store displays attractive and useful new items for the household or individual use.
The store's feedback often is the potential customers are induced to work harder to be able to afford to purchase such items that improve their living standards. The store has, thus, created incentives in the labour force, resulting in improved productivity in the economy.
Mr. Koo says that because Hong Kong is a free port with free competition and little government intervention in the economy Hong Kong stocks practically everything the world produces. This contributes to Hong Kong's knowledge of other people's innovation. It adds to Hong Kong's sophistication, ingenuity, flexibility and adaptability in its own production.
Mr. Koo thinks that beside meeting the community's vital material needs, the retail sector contributes in a subtler complimentary role to the development of the economy. He says that complimentary role is one reason why Hong Kong has only 4% unemployment today whilst some more developed nations have recorded 10-12%.

Dr. Russell Kwok, managing director of **Wing On Co. Ltd.,** says his firm has just opened a new 36,000 square ft. one-floor store at Tsimshatsui East, its 8th store, four now on each side of the harbour) to provide the people of Hong Kong with a wide variety of goods at bargain prices.
Dr. Kwok says the idea formed from Wing On's observation of a recent changing trend in local shopping behaviour. Customers are now seeking better buys.
Wing On detects the trend in its sales figures. Volume, Dr. Kwok explains, is going up but the number of transactions is going up even faster. This indicates the amount per purchase is lower and the conclusion to be drawn is that more is being spent now on less expensive items.
He thinks expensive boutiques, unless they have very steady clientele, may soon begin to feel the pinch.
Dr. Kwok outlines some other changing patterns in recent years in retailing. He says children's goods are steadily becoming a fast mover and that is why so many toy shops and kids' stores are opening up.

Smaller

He says the reason is that families are becoming smaller. Parents can therefore afford to spend more on better things for their children.
Another trend, Dr. Kwok says, is that customers are becoming more knowledgeable. That makes self-service more acceptable. Once a salesperson had to explain everything to a customer. Now the customers read the English labels and understand.
Dr. Kwok says shoppers are becoming more mobile because of the MTR. Wing On sees customers from Tsuen Wan areas shopping in Tsimshatsui. Hitherto, stores tended to do the major part of their business with people who lived in the same locality.
Shopping areas could go on changing with the development of the MTR, Dr. Kwok thinks. He points out his own main store at Wing On Centre offers free parking with a purchase at weekends. Cars add to shopper mobility.
Dr. Kwok says Wing On fits the changing pattern of the lifestyle of the people of Hong Kong by providing convenient shopping. By convenience he says he means both location and selection.
He says Wing On has always claimed to be Hong Kong's most complete department store and he believes this is still true. But instead of one complete store there are now eight Wing On stores. The firm's expansion began in the early 'Sixties and picked up speed in the

recent boom years. The reason: increasing population and improved affluence. Wing On's style has not, however, changed much but more modern management techniques and technology are being applied. The company still caters for the middle and upper-middle income class. Its customers are mostly local and it provides them with their more basic level consumer goods.

Dr. Kwok says 80% of what Wing On stocks is imported goods. By being the complete store catering for basic needs Wing On feels it can ride the economic storms better than specialty stores.

He describes Wing On as a traditional family operation with the simple objective of providing residents and visitors with shopping convenience. But also of providing stable employment for the 1,700 who work for it.

The Census and Statistics Department produces a monthly survey of retail sales. The latest available statistics are provisional figures for last November.

The value of retail sales in that month is estimated to have been $4,479 million. The overall sales *value* index for November increased one point or by 1% compared with the previous month, but was unchanged compared with November 1981.

The overall retail sales *volume* index for November, 1982, at 105 was the same as the previous month but eight points down or 7% lower than for November, 1981.

The statistics support Dr. Kwok's views that shoppers are looking for better buys and that price, rather than image, is becoming more important in the Hong Kong retail trade.

The C&SD's statistics for last November confirm retail sales in department stores increased by 7% in value terms and 6% in volume terms compared with the previous month. However, retail sales in supermarkets in November declined by 6% in value terms and 7% in volume terms.

Mr. M.T. Radmore, director and manager of the **7-Eleven** division of Jardine Marketing Services Limited, says one needs to be careful in concluding price is becoming more important than image. At the few-dollars-and-cents end of the retail market, he says, price has always been an important factor in retailing.

The development, under United States licence, of 36 Hong Kong 7-Eleven stores open 24 hours a day for every 365 days a year in residential neighbourhoods all since April 1981, is one of the most remarkable phenomena in the changing local patterns of retailing and lifestyle.

Mr. Radmore calls the 7-Eleven store the sophisticated, modern-day second generation of the corner store and emphasises it is not a supermarket.

He says the friendly neighbourhood 7-Eleven store is the embodiment of all aspects of convenience — hours, location, consistent stock layout, wide aisles and fast, friendly service (itself a major training challenge in Hong Kong).

Mr. Radmore explains the need for the corner store is still there among consumers though old-style corner stores are disappearing under pressures of competition, overheads, rents, etc. One of the keys to retailing, he says, is the need to stay current. Customers change, tastes change, living styles change. It is important to stay in touch with customers and to be extremely flexible.

Numbers

Numbers, he says, are important to the 7-Eleven concept and he expects to have 100 outlets by 1985. Numbers give the stores collective buying power that the individual corner store never had. It enables cost-efficient advertising especially on the electronic media.

"And there's better management of what's on the shelves because we are able to trace product movement with computers." The 7-Eleven store, Mr. Radmore says, achieves wide convenience with limited brands, limited sizes and limited facings.

"What we are saying is: So you need canned soup? Okay, it so happens we've got Campbell's base moving flavours. You want coffee? We've got Nescafe. Toilet paper? We've got Andrex, but not a whole stack of other brands."

The 7-Eleven stores also stock a wide and popular variety of fast foods from dim sum to pizza pieces and submarine sandwiches. They sell from gravity-fed display doors on deep refrigerators that are back-loaded and ensure the stock is always 40 degrees Fahrenheit. The focus of the fast food service is unique. It is a micro-wave oven where the customer can pop his purchase and warm it in a few moments. Besides there's hot coffee and chocolate or cold coke, etc. to go with it. The customers take it all home ready to eat.

Mr. Radmore says the result is we are getting young people who have a greater need for convenience and are much more ready to adapt to new ideas.

"Our classic profile is young marrieds with one or two children. Both work. They have the freedom to pop in to their neighbourhood 7-Eleven store when they come home from work without having to worry about what time we'll be closing for the night," he says.

Mr. Radmore says he's beginning franchising 7-Eleven stores to local individuals who will run them but not on the classic basis of percentage to turnover.

"We'll provide the store and divide the gross profit with the franchisee. We'll provide the on-going advisory assistance, including computer reporting and a complete bookkeeping service. The franchisee will provide the people, meet the payroll, shrinkage, etc. out of his percentage.

"We'll be putting the little guy with a little capital in business, lessening his risk. And he will be taking a real interest in his own neighbourhood customers. 7-Eleven is doing it already in the United States, Japan, Australia, Singapore and Taiwan as well as now pursuing this principle in Hong Kong."

Mr. Owen Price, managing director of **Dairy Farm Co. Ltd.,** says there are now 63 Wellcome supermarkets throughout Hong Kong, Kowloon and the New Territories. The number will reach 100 in the next three years and then go on developing.

Researchers say the company has a 40% share of total supermarket sales in Hong Kong which now exceed 50% of all food and household provision sales.

Mr. Owen Price sees the growth of supermarkets in Hong Kong as part of an overall dramatic and rapid emergence of chain store retailing. This development, he says, embraces the department stores, like Wing On, Da Da and Klasse, and includes the entry of a large number of Japanese retailers who are among the most sophisticated and best in the world.

The resultant stirring up of the retail industry is moving it from the shophouse syndrome into a much more sophisticated pattern. Major stores are moving from the centre into the suburban areas and into the New Territories.

The new chain stores, and the supermarkets in particular, are introducing modern retailing methods, using im-

(continued on P.20)

Hong Kong's Mr. Statistics Invites Unemployment Critics to Put Their Figures Where Their Mouths May Have Been

The layman tends to scoff sceptically and some labour unions to express downright distrust when the Census and Statistics Department quarterly announces its estimates of unemployment and underemployment in Hong Kong.
Few know the general household survey on which the estimates are now based is as professionally done as anything in the world. And in estimating underemployment Hong Kong is unique.

In the United Kingdom they have a simple, cheap and practical way of measuring unemployment. They just add up the number of workers registered for unemployment benefits and publish the total every month.
The figures ignore the number of unemployed not entitled to benefits. They include those thought somehow to receive benefits who have jobs. Nothing is done so far as one knows about finding out how many workers may be underemployed.
France and West Germany calculate their unemployed in a similar way to the UK, though it's fair to add all three developed European nations do conduct a labour force survey once every 12 months.
If Hong Kong measured its unemployed monthly like the UK, France and West Germany do, then last October, for example, it would have had 704 unemployed and 1,551 underemployed. They were the number of workers respectively receiving full public assistance and partial benefits from the Hong Kong Government (the latter because their incomes were so low they could not fully keep their families).
However, according to estimates published in January by the Census and Statistics Department (C&SD) for the quarter ended last October, Hong Kong had 106,700 unemployed and an additional 42,000 underemployed people in the economically active population of about 2.5 million aged 15 years and over.
These labour force characteristics are derived quarterly from a continuous general household survey of 15,000 Hong Kong households comprising about 55,000 people. C&SD employs 102 people permanently questioning the respondents in the random but fully representative sample every three months. They get a 98% response. It costs annually about HK$4 million.

Census

The household survey has evolved since 1961 when Hong Kong first attempted to estimate its employed population in its first post-war census. The age limit was then set at 6 years and over and the work hour criterion at no less than 40 hours in 20 days.
In the 1966 by-census the age limit was reduced to 5 years and over but by the time of the next full census in 1971 the age limit had gone up to 10 years and over and the hour criterion down to at least 15 hours in 7 days. In the 1976 by-census 14 years and over and 15 hours in 7 days were adopted.
But in September 1975 a separate labour force survey was begun with an age limit of 15 years and over and a work hour criterion of 15 hours in 7 days. This survey adopted the definitions used in the population census and continued six-monthly until after the 1981 census when the current general household survey was introduced reporting quarterly based on International Labour Organisation definitions.
The quarterly household survey compares with the United States monthly survey based on 60,000 households. But some definitions vary slightly. Monthly surveys on ILO definitions are also undertaken in Japan, Canada and Sweden. Australia and Italy conduct similar surveys quarterly.
Unlike Hong Kong the developed countries do not in general estimate underemployment. The concept was devised originally with developing countries in mind because of the particular circumstances of their rural populations. The traditional definition of unemployment, geared to industrial societies, is less meaningful for them.
Thus a figure, such as 4.5% unemployment in the Philippines or 1.5% in Indonesia may be meaningful in Manila and Jakarta but less applicable at subsistence levels among farmers in rural villages. Experiments in reaching more meaningful unemployment and underemployment figures are known to have been conducted in some Southeast Asia countries. But Hong Kong will be the first to publish results regularly.
The August-October report of C&SD on its quarterly general household sur-

vey found the unemployment rate in Hong Kong to be 4.2% of the labour force or 3.8% after adjusting for seasonal variations.

It defined underemployed people as those who worked less than 35 hours during the week prior to enumeration and who were either seeking more work or were not seeking more work because they believed none was available.

Propaganda

Based on the 35-hour work criterion it found 1.7% of the labour force was underemployed out of 9.3% who were working less than 35 hours a week, the remainder for reasons of their own choosing — such as because they are housewives or people over 60 year, etc.

However Hong Kong is not without its prejudices and misconceptions when it comes to statistics. The virtual non-existence of unemployment figures until 1975 does not help get them accepted now. A good result can be interpreted as merely government propaganda.

The methodology and definitions used by our statisticians are little more than gobbledegook to the layman. There is among some a conviction figures can be interpreted to say anything.

The public does not appreciate the professionalism that goes into producing its unemployment and underemployment figures. Nor, why they are superior to those produced monthly in the United Kingdom.

The public does not perhaps realise that statisticians have ethics. The public is however aware that when statisticians do produce unemployment figures they are always 2½ months late.

This quite understandable delay (because statistics have to be worked out) has sometimes led to the charge by involved labour groups that the release of the figures was stage-managed to lessen the impact of a maybe worsening situation. It could have relevance at the time of writing.

The Lunar New Year holidays are generally expected to be an excuse for some recession-hit factories not to re-open, or, at least to delay re-opening until economic conditions improve.

Indeed, the relatively good news of low October unemployment and underemployment rates has been critically received 2½ months later in mid-January.

But the C&SD figures are hard for critics to fault. So, instead of challenging the methodology of the C&SD household survey, critics have tended to complain about the C&SD's underemployment rate being lower than the unemployment rate which they think must be illogical.

In two television shows in January the Census and Statistics Commissioner, Mr. Colin Greenfield, challenged C&SD critics to produce comparably professionally designed and executed surveys to disprove his statisticians. But critics have backed away from his challenge, retreating to the old argument about the low underemployment figures being illogical.

The only thing that is illogical is their own feeling, Colin Greenfield says. The two rates are matters of fact. Logic cannot help preconceived disbeliefs. The relationship between the numbers of unemployed and the numbers of underemployed is an empirical matter and depends upon the extent to which:

a) workers become unemployed because their firms cease to operate;
b) firms dismiss workers as a "belt-tightening" exercise to survive in difficult times; and
c) firms work shorter hours rather than dismiss workers as a "belt-tightening" exercise.

Table A, supplied by C&SD, shows unemployment (old and new definition), underemployment (when available) and the proportion working less than 35 hours a week since the 1971 census. The figures show unemployment has always exceeded underemployment.

Short-term Option

Colin Greenfield says he does not find this surprising. While it is a popular belief in Hong Kong that firms prefer to work short hours rather than dismiss workers (and many do), this can only be a short-term option.

Unless business picks up in a relatively short period of time, these firms will be forced to dismiss some workers or they will go out of business. In that case all of their workers would lose

Table A

Unemployment, Underemployment and Hours of Work

	Unemployment Rate (seasonally adjusted) LFS definition	GHS definition	Underemployment Rate	Percentage of Employed working less than 35 hrs. a week
	%	%	%	%
1971 (Census)	4.5*	–	–	–
1975 Sept.	8.6	–	–	–
1976 March	5.6	–	1.9	7.2
Sept. (By-census Aug.)	4.2	–	1.9	–
1977 March	4.4	–	1.6	9.2
Sept.	3.6	–	1.2	7.0
1978 March	3.0	–	1.0	7.8
Sept.	2.4	–	0.7	7.3
1979 March	2.3	–	0.5	5.6
Sept.	2.7	–	–	6.5
1980 March	3.2	–	–	6.4
Sept.	3.8	–	–	7.9
1981 March (Census)	4.1	–	0.3†	8.5
††Aug-Oct	3.6	3.5	–	13.0
Nov-Jan 82	3.1	3.0	–	10.7
1982 Feb-Apr	3.5	3.4	–	15.6
May-Jul	3.4	3.3	–	9.2
Aug-Oct	4.0	3.8	1.7	9.3

**including Armed Force, transients and the marine population; Not seasonally adjusted.*

†excluding persons not seeking more work because believed more work not available.

††As from August-October 1981, all figures are from the continuous General Household Survey which replaced the Labour Force Survey. The GHS figures are weekly averages over a three-month period, whereas the LFS figures are weekly averages over a two-week period. Census figures are weekly averages over the duration of the Censuses, normally about 10 days.

their jobs.

Colin Greefield goes on to answer Christian Industrial Committee claims that the C&SD has tried to conceal the true unemployment situation by changing in 1981 to a new definition of unemployment. He says if Committee officials ever took the trouble to read C&SD publications on the General Household Survey (and he has sent copies to them) they would not make that claim.

He says, though C&SD has switched to a new definition it has continued to publish unemployment estimates using the old definition. He says C&SD has done that so that all could see what difference the change has made. The answer is very little, at most 0.2 percentage point.

The new definition, Colin Greenfield explains, follows the recommendations of the ILO and is in line with that used by many other countries. The old definition that goes back to the 1971 census, he says, was used in the 1975 first labour force survey because it was essential at that time (when the unemployment situation was more serious than now) to be able to make a comparison with the nearest previous estimate available.

The South China Morning Post in an editorial has also been reluctant to accept Mr. Greenfield's underemployment rate.

It described the C&SD definition of underemployment as "a statistician's quibble" and said the facts remained that on top of 100,000 unemployed, 250,000 are working less than six hours a day, six days a week.

Mr. Greenfield rebutted the accusation, saying:

"It is not a statistician's quibble. It is a product of the deliberations of persons from many countries with years of experience in the field of measuring characteristics of the labour force, as accepted and recommended by the International Labour Office.

"Such persons include not only statisticians, but also sociologists and economists, among other disciplines. However, the final recommendation rests primarily on commonsense rather than academic discipline.

"That one must have a definition is, I trust, obvious. That there will always be scope for quibbling over definitions is also true.

"In the case of underemployment one could argue whether the cut-off point for short hours should be 35, or 40, or 45, or whatever. Given this, the important thing is to choose one definition that is reasonable and stick to it so that changes over time can be measured."

Mr. Greenfield went on to say a definition of underemployment as the number of all people working less than 35 hours a week would not be sensible.

"If one's wife chooses to remain at home and attend to household duties rather than take up employment, then she is not regarded as unemployed, either by statisticians or, I think, by anybody else.

"If one's wife chooses to take a part-time job because she does not want a full-time job then equally she should not be regarded as underemployed...."

Answering the SCM Post statement that labour groups know very well from their own surveys that the underemployment percentage is in double figures, Mr. Greenfield asks:— "Which surveys and where have they been published?" He repeated his TV accusation that those he has seen completely lack professionalism.

Unacceptable ?

The SCM Post added a footnote to Mr. Greenfield's rebuttal. It said: "As we said, we find it hard to accept that in addition to 100,000 unemployed and perhaps 43,000 "underemployed" a further 250,000 are voluntarily working less than six hours six days a week at a time of recession and relatively high inflation in a year when real wages are likely to fall..."

Mr. Greenfield says the implication in the footnote is that 250,000 + 43,000 = 293,000 persons are working less than 35 hours a week. The C&SD report shows unemployment at 107,000 and those working less than 35 hours a week at 223,000 of whom 42,000 were classified as underemployed. This actually left 182,000 voluntarily working less than 35 hours a week.

He asks if the SCM Post won't accept that figure, then what figure would it accept? Even when unemployment was at its lowest in March, 1979 Hong Kong still had 5.6% of the labour force working less than 35 hours a week. Unemployment was then 2.3% and underemployment was still 0.5%. That was in a situation of considerable excess demand for labour.

People working less than 35 hours a week voluntarily, Colin Greenfield says, include housewives, pensioners and students as well as those on holidays or sick. They also include people like some teachers whose fulltime jobs are less than 35 hours a week. They could be people starting mid-week in new jobs and those in industrial disputes.

One reason why underemployment is not estimated in most countries, Colin Greenfield says, is that it is not nearly as clear-cut in definition as unemployment. To know how many people do not have jobs but would like them is fairly clear-cut both as regards the economic challenge and the policy implications for social welfare programmes.

Underemployment lacks this precision. A person working 34 hours is in a very different position to one working 5 hours. Though both may say they would like more work — how much more? The extra they would like is clearly not the same for both.

So, underemployment does not measure the degree to which people are underemployed. It is merely a statistical indicator, albeit potentially important, of how many people are underemployed.

Colin Greenfield says it is largely in response to this problem that an "hours" criterion is used, above which people are not classified as underemployed. One could ask all employees if they would like more work and any that said "yes" could be counted as underemployed.

But what is the significance of their saying they want more work when they may already be working 50 hours a week? How much more work could they do?

Colin Greenfield says the "hours" criterion eases this problem, but only partially; so estimates of underemployment remain indicative only. Besides, there are other types of underemployment — through low productivity and mis-allocation of human resources, for example. None of this, of course, explains why we will under the current system of quarterly unemployment reports have to wait until mid-July to find out how much the unemployment rate worsened, if at all, after the Lunar New Year holidays when some firms were expected at least to delay re-opening their factories.

Colin Greenfield's answer is that he hopes to have a provisional figure earlier. He says he is testing a different estimating technique with which he might be able to produce a provisional moving average monthly unemployment rate in respect of the previous three months that is sufficiently reliable for publication. □

When It Comes to Survey Work, the Message is Clear— Amateurs need not Apply

Mr. Colin Greenfield, the Census and Statistics Commissioner, says what he knows of unemployment surveys done by Hong Kong labour groups, such as the Christian Industrial Committee, which lack professionalism, are in consequence worthless and can indeed, be positively misleading.

But what credence should the public give to his own Department's unemployment estimates? How professional is the C&SD itself?

The Social Statistics Division of C&SD undertakes the continuous monthly general household survey that provides the data for the quarterly unemployment estimates.

The Bulletin met Mr. Yip Hak-Kwong, acting assistant commissioner responsible for this division, together with its senior statistician, Mr. Wong Hung-sum, the statistician directly in charge of the general household survey, Mrs. Donna Shum, and her senior statistical officer, Mr. Y.S. Yuen.

Mr. Yip is relaxed about it all and does most of the talking. He begins by describing statisticians as "Jacks-of-all-trades but masters of only one." He means, of course their educational backgrounds may differ but their common expertise is as statisticians.

He says some got their university training as engineers, economists, mathematicians, sociologists and in the sciences. He knows one whose training was in geography. But all of them have obtained training in statistics as well.

Mr. Wong explains there is a branch of the Institute of Statisticians in Hong Kong, holding examinations for membership. C&SD statisticians are usually members.

He points out, too, Hong Kong has its own Statistical Society. He produces a 10-foolscap page brochure written by the American Statistical Association in Washington, titled: "What is a Survey?"

It so happens Mr. Yip's boss, Colin Greenfield, was president of the Hong Kong Statistical Society last year and he wrote a forward for the local circulation of this American document. The forward says: "Surveys are becoming more and more popular these days in Hong Kong. If their findings are to be reliable then it is essential that great care, in addition to adequate professional knowledge and experience, should be applied in planning and conducting them and in analysing their results."

The document's preface itself says: "People are accustomed to seeking the results of surveys reported in the daily press, incorporated in advertising claims and mentioned on numerous occasions by political analysts, social critics and economic forecasters.

"Much less frequent, however, is any discussion on the reliability of these surveys or what is involved in carrying them out. The wealth of information may easily lull the user into assuming that surveys are easy to undertake and to overlook the many steps involved in a properly-conducted survey.

It goes on: "If technical issues are recognised, there is a frequent tendency to assume that they should be left to the survey expert himself."

It then discusses at length the characteristics of properly-conducted surveys, details how to carry them out and outlines how to use a survey's results.

Mr. Yip and his colleagues are too modest to describe themselves as survey experts. Mr. Yip and Mr. Wong approach the subject more obliquely.

First Mr. Wong defines statistics as an economic and viable way of finding out — a summary measure of data (obtained by a survey) from which information (such as patterns or trends) is derived. He says the role of statisticians is to collect, analyse and interpret the data.

He explains over 1,000 people work in C&SD. Of course, not all are qualified statisticians. The department is divided into a field staff and an office staff. Working on the general household survey are 71 field staff and 31 office staff.

The survey field staff is divided into 61 interviewers and 10 supervisors. The survey office staff comprises editors and checkers plus sub-professional people involved in quarterly analyses and report preparation.

Mr. Yip then draws a diagram and explains the general household survey separates the economically active population from the inactive and how statisticians find the employed and the unemployed populations within the economically active. He says the unemployment rate is expressed as a percentage of the total economically active population. *(See Figure 1)*

He draws another diagram to explain

Fig. 1 — Labour Force Diagram

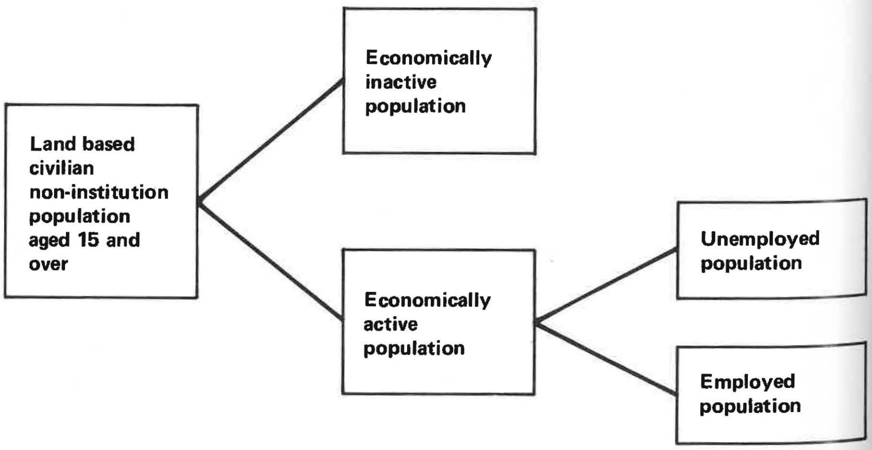
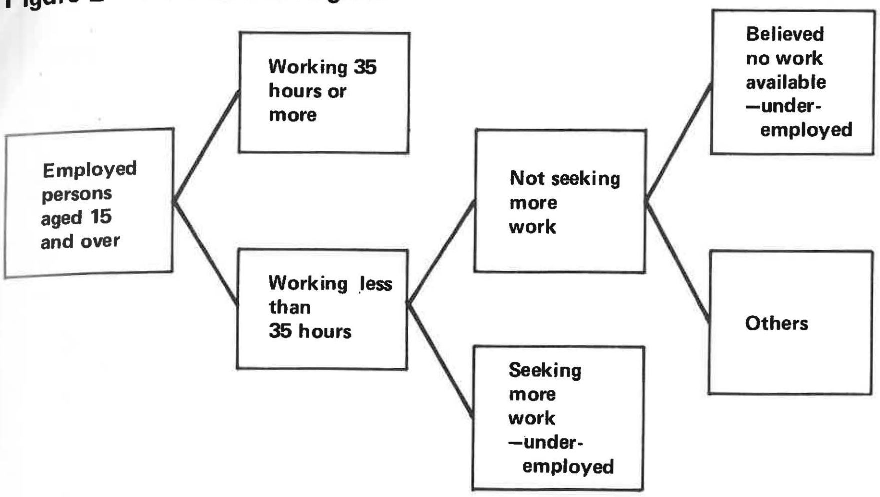


Figure 2 — Utilization Diagram



how the statisticians find the underemployed within the employed population aged 15 years and over. He says statisticians separate out those working more than 35 hours a week from those working less than 35 hours.

Statisticians, he says, then define those working less than 35 hours but seeking more work as underemployed — plus those who would like to do more work but are not seeking more work because they think none is available. *(See Figure 2)*

Next, Mr. Yip produces 33 typed and duplicated foolscap pages stapled together and headed "Instructions for ACSO." This, together with 11 appendices, is the "bible" of the General Household Survey's 61 interviewers and their 10 supervisors.

Optimal Sample

He explains C&SD doesn't go out every three months and interview the whole land-based Hong Kong population to find out the unemployment rate. It makes a general household survey of only an optimal sampling fraction of the population and projects from the data derived an estimation for the whole population.

The fraction, he says, is only 1.125% and only roughly a third (0.375% of the total fraction) is interviewed monthly to make up its three-monthly reports. But the fraction is a carefully designed representative sample of the whole population.

Mr. Yip says C&SD has a geography section that maintains uptodate after each 10-year population census a list frame of living quarters in Hong Kong, including permanent housing units and temporary structures. This section produces the quarterly sample for the household survey of about 14,000 living quarters (or 1.125% of the population).

But the unit of inquiry in the survey is households of one or more persons, not living quarters. Some living quarters house more than one household.

Mr. Yip says the detailed instructions to interviewers cover the persistent methods they must follow to interview all members of every household they find at each living quarter. It explains all the definitions and concepts. It tells them with examples how to be helpful in asking questions yet still be neutral. It explains how to avoid leading questions. It explains the importance of courtesy in achieving accuracy.

He says the supervisors are there to help the interviewers get the right and accurate response. Actually this is very high (about 98%) because C&SD permanent interviewers and supervisors of the highest calibre are assigned to do the survey that takes them into squatter areas, temporary housing sites, stone huts and rooftop dwellings as well as permanent housing units.

Mr. Yip says after the completed questionnaires are checked by the supervisors they go to statistical officers who extract by manual count preliminary information for control purposes. The data is then processed for the computer. It is key-punched into code form on magnetic tapes.

The computer edits for errors and asks the staff to clarify. For instance, it would want checked a possible key-punching tabulation error that said an office boy's salary was $7,500 a month.

Mr. Yip says the computer check is done three times to produce clean data. And it is from this clean data the estimates are finally produced.

Finally, Mr. Yip produces the quarterly report for August-October 1982 of the General Household Survey Labour Force Characteristics. It gives the broad conclusions of the survey, followed by a description of the characteristics of the employed and unemployed population.

Findings are compared with those obtained from surveys in the preceding quarter and in the same quarter of the previous year. The report explains information on underemployment has been collected since August, 1982. But Mr. Yip says underemployment information was also previously gathered up to March 1981 when the figure was found to be 0.3%.

In the population census, the discouraged worker was however excluded. Reasons for not seeking work were not asked in the population census.

Part II of the latest quarterly report outlines the survey methodology adopted in the survey. A further technical report on the sampling design and estimation procedure, it says, will be issued in future.

Finally, the report says the definitions used in measuring labour force and unemployment in the survey follow those recommended by the Eighth International Conference of Labour Statisticians. The definitions are given in an appendix.

As these differ slightly from the definitions adopted in the former Labour Force Survey (1975-80) and the 1981 population census, estimates of the labour force and unemployment based on the old definitions are given in another appendix to facilitate comparison.

It's a lot for the layman to follow. But nothing does seem to be hidden by Mr. Yip and his colleagues. ☐

Complexities of US Immigration Law for Hong Kong Investors

For a great many years, Hong Kong businessmen have travelled extensively to our main market, our largest industrial investor and one of our largest suppliers, the United States of America. Most company executives travelling to the U.S. are well aware of the procedures for securing the all important visa. Some however may not be quite so well informed on the procedures involved in obtaining the requisite visas appropriate to setting up business branch offices in the U.S. A visit to the U.S. Consulate General in Garden Road might do the trick but where the issue is not clear cut, the advice of a professional company might be useful.

The following article was written for *The Bulletin* by a senior executive of one such company located in Sacramento, California. If, after reading the article, any Chamber member wishes to contact the company, its name can be obtained from our Publications Section.

Hong Kong companies considering opening branch offices in the United States should first familiarise themselves with American Immigration laws affecting such activities. The establishing of a branch in the U.S. naturally would involve the transfer of certain key personnel and this could result in a variety of problems with the U.S. Immigration laws.

There are special provisions in the U.S. Immigration code to facilitate these so-called "intracompany transferees." This type of visa is a nonimmigrant visa, consquently it is effective for a limited period of time. Normally these visas are valid up to three years, but if it can be shown that business necessity requires a longer period of time, then they can be extended beyond the time. While the wording of the law appears to be clear and uncomplicated, it is very complex and constantly is being changed by the court and administrative decisions.

One of the basic requirements to qualify as an intracompany transferee, is that the person being sent to the U.S. branch office must have been employed by the parent company for at least a year in a managerial or executive capacity, or in a position involving specialized knowledge.

It's apparent that an ordinary production line worker could not qualify as an intracompany transferee, but there have been numerous administrative and court cases concerning the question of whether a certain person could be classified as a manager or executive in order to qualify as an intracompany transferee under the U.S. Immigration laws. However, the cases involving the question of what would constitute "specialized knowledge" in order to qualify as an intracompany transferee is even more troublesome than the problem of defining who qualifies as an executive or manager. While there would be no doubt that a supervisor of a large department would be classed as a manager, it isn't that easy to define exactly what would fall into the category of "specialized knowledge." As an example, it's generally been ruled that a secretary's job normally would not be one which required the specialized knowledge necessary to qualify as an intracompany transferee. On the other hand, if it could be shown that the work of a particular secretary did require specialized knowledge, and could be so documented, then that worker could qualify as an intracompany transferee. It should be emphasized that the administration of U.S. Immigration law is far from being an exact science. Each case is decided on its own individual merits, and the U.S. Immigration Service and U.S. Consulate Officials have considerable discretion in their handling of such cases. It's not unusual for two similar cases to be decided in two different ways because they happened to have been handled by different Immigration or consular officers. Since these officials have such discretionary powers, it is especially important that intracompany transferee cases be prepared properly and include all necessary documentation.

Executive-owner

In the past there was some question as to whether an owner or part owner of a corporation could qualify as an intracompany transferee. However, that matter has been finally resolved and now it is clearly established that if a person is an executive of a corporation, and is also an owner of that company, he can qualify as an intracompany transferee. This rule applies even in situations involving sole ownership. It should also be noted that it is not neccessary for the intracompany transferee to perform full-time services in the United States. He may divide his time between the U.S. branch office and the company headquarters in Hong Kong. When an executive is transferred to a U.S. branch under this type of visa, his wife and all unmarried children under 21 years of age, may accompany him.

Another point of particular interest is that the benefits of such visas are not just limited to large companies with hundreds or thousands of employees. Smaller firms may also avail themselves to this type of visa. And it is not necessary that the company

Outside Labour Helps Italy's Toy Industry

***The Bulletin*'s special contributor with an in-depth knowledge of the toy industry in Italy concludes his two-part series with a wealth of interesting background.**

In Italy, very often homework (lavoro a domicilio), black labour market (lavoro nero), a second job (second lavoro) and the underground industry (industria sommersa) refer to one and the same phenomenon. This new aspect of the Italian economy attracted international attention for the first time when the "Paris Herald Tribune" published on 5th February, 1979 an interview granted by the Italian economist, Andrea Saba to the newspaper's correspondent, Chris Matthews.

To have an idea of the size of the underground industry in Italy, we may refer to one figure. The output of the underground industry was estimated at 66,372.8 billion liras in 1978 while that year's GDP was 222,254 billion liras.

Figures, whether estimated or scientifically worked out, are of course to be treated with caution and discernment. Statistics, even when appropriately manipulated, are mere tools and comments on statistics should not replace serious efforts to inquire into the deeper causes of economic phenomena. But all the persons I interviewed in Italy have confirmed that in Italy there is a widespread black labour market, an indispensable component of the underground industry. An Italian banker said: "Everybody in Italy has a second job. The work ranges from book-keeping, repairing cars to household odd job." It goes without saying that here everybody means many. I have seen persons employed permanently by a "second" firm when they have days off.

Pension

A friend of mine who is a Neapolitan once said: "Life in Italy is not bad. We have social security. When one retires he can buy a small flat or house with the lump sum he receives from the gratuity scheme (i.e. "liquidazione"). Then he can live on his pension. My father, who is a farmer and has retired, is always very excited on days when he draws his pension. Besides, since he lives in the country, he can always find some odd jobs to get extra money." These odd jobs are, it is understood – not declared, for a "declared job" means a reduction in pension.

They key point of this phenomenon all 'italiana is "non declaration". When a job is not declared, the undeclared employee need not pay income tax and contributions to social security. The undeclared employee, whether a housewife, a pensioner, a student or a person who has a declared job, is in any case already covered by the system of social security. Besides, the working hours of undeclared employees are more flexible.

The undeclared labour market also gives employers greater flexibility. Employers can, in short, get round all the "rigidity and burden" of the social

---

Complexities of US Immigration Law for Hong Kong Investors

transferring the employee to the U.S. be engaged in international trade.

A question often asked is how much money must be invested in a branch office to qualify for intracompany status. The amount of money is not a relevent factor. What is more important is that the branch office will be engaged in substantial business activities.

In cases where the branch office is not yet in operation, a visa can be issued to a company executive for the purpose of coming to the U.S. to establish the American operation. However, it is required that some preliminary steps have been taken to indicate that the company is serious about establishing a U.S. branch. These preliminary steps would vary with each case, but usually it would include leasing office space and filing incorporation papers.

The first thing to be done to begin the application process for an intracompany transferee visa is the filing of a petition at the Immigration Service office in the United States which has jurisdiction over the area where the branch office will be located. The filing of the petition may be the most important part of the application process. Considerable documentation is required to be submitted with the petition. Unless the petition is prepared properly and adequately documented, it will be denied. Once the petition is approved by the Immigration Service in the U.S., the case records then will be sent to the U.S. Consul in Hong Kong where the final decision on the visa application will be made. It should be emphasized again that while the U.S. Consul makes the final decision, he cannot consider an application for an intracompany transferee before a petition has been approved in the U.S. by the Immigration Service.

As mentioned above, the intracompany transferee is a non-immigrant visa, and normally is extended up to three years. It should be pointed out, however, that in many cases it will be possible for the intracompany transferee at a later time to convert the temporary visa into a permanent visa. And like all such immigration matters, each case will be judged on its individual merits as to whether that particular applicant qualifies for a permanent visa. □

legislation, which the powerful trade unions keep a jealous eye on. Italy's trade unions are an economic power centre to reckon with. The big three are C.G.I.L. – Confederazione Generale Italiana del Lavoro, U.I.L. – Union Italiana del Lavoro and C.I.S.L. – Confederazione Italiana Sindacati Lavoratori. Yet both the trade unions and the Italian government close one eye to the underground industry. This is another proof of its considerable dimensions.

If, by resorting to outside labour, the Italian toy industry can still cope with the difficulty in production due to marked seasonal fluctuations, the industry faces yet another problem, partly also due to the seasonal character of the toy trade. On the one hand, toy manufacturers receive payments in January of the following year, while on the other hand, they have to keep substantial inventories as a measure of counterbalancing seasonal fluctuations. "In Italy, toy wholesalers do not keep stocks of a variety of articles. They sell on an article to article basis.", once a toy retailer complained to me.

Advertisements

Toy retailers are yet blamed for their unwillingness to collaborate on selling toys which are not advertised. The fact of the matter is that manufacturers and importers are lavishing money on advertisement, resorting to newspapers, toy periodicals, children's literature, TV series, contests and all other possible means.

On the occasion of the 59th International Automobile Show from 21st April to 2nd May, 1982, Polistil, the Italian toy manufacturer we mentioned before, held a Polistil Scale Model Show. In its Automobile Museum, all the model cars made by Polistil from 1960 to the latest generation were displayed.

The American toy giant, Mattel Electronics, has a budget of 8 billion liras for publicizing, on the Italian market, one single TV game – "Intellivision", which is, together with the cassettes, made by Mattel's subsidiary in Hong Kong.

"Lego" organized a contest to promote its "Fabuland" in Italy. The contest took place from April 1981 to November 1981. Over 50,000 children participated in the contest. The first prize was a free trip to Billund/Copenhagen for 2 persons.

In an issue of "Vendogiocattoli", a periodical of which the readership is toy retailers, "Lego" inserted an advertisement, publicizing its publicity programme in order to win over toy retailers.

Foreign toy makers are very aggressive on the Italian market. For instance, "Mattel", "Fisher-Price", etc. also participated in the 1982 Milan Sample Show, which was held from 14th to 23rd April. To Hong Kong toy manufacturers and exporters, the Milan Toy Fair is perhaps more familiar. The 1982 Milan Toy Fair registered 933 participants, of which 208 came from 26 foreign countries, while the 33rd Nuremburg International Toy Fair reported 1753 participants, of which 736 came from 39 foreign countries.

Reports on the Milan Toy Fair say that this year the tone was less pessimistic than last year. The Fair has confirmed the trend of returning to classic toys, such as dolls, stuffed animals, educational toys in wood and precious metals etc.. The era of toys incorporating complicated technology into classic toys is considered coming to an end. The same fate is facing pin-ball type electronic games. On the other hand, video games with computer programmes will be the best-sellers as they are already in Italy. There is a great demand for the TV game "Intellivision". According to the figures disclosed to me, the price of "Mattel" 's "Intellivision" will go up by over 14% as from September, 1982.

The Secretariat of the Milan Toy Fair has estimated that on the average an Italian family spends 43,000 liras on toys per year. This figure is considered by many people as too low. A study published in France shows that in European countries, toys take 0.4%-0.5% of the total expenditure of a household and these percentages have remained unchanged although the population belonging to the age groups of up to 14 years have decreased since the second half of the seventies.

Italy's official statistics have also confirmed the said trend. Italy's latest census took place in 1971. The population in Italy was then 54,136,547, of which 13,227,663 were under 15 years of age. Italy's population calculated on 1st January, 1980 was 56,999,047, of which 12,698,545 were under 15 years of age.

One of the reasons why the percentage of expenditure on toys has remained unchanged even in times of recession and in spite of the decreasing number of children is that toys nowadays cover a wider range of products. Besides, the game market has been expanding rapidly. For instance, a Hong Kong made talking watch selling at HK$40.00 is regarded by many Italian kids as a new electronic toy, while Rubik's "magic cube" and Meffert's "pyramid" are also very popular among youths and even among adults. By the way, Uwe Meffert is a Swiss mathematician living in Hong Kong.

Games Market

Italian toy retailers seem quite attentive to the expanding game market just as they are so in respect of other market trends, although people have been complaining about the backwardness of the Italian distribution channels.

The Italian government does not intend to encourage the formation of supermarkets and hypermarkets. Instead, it intends to improve the existing system by helping expanding small firms and by exposing retailers to greater competition.

Recently, the Italian government has decided not to issue, for 3 years, business licences for opening stores which have an area of less than 200 sq. metres and are in a town with a population of less than 30,000. It has also decided to earmark, for the period from 1982 to 1991, additional 50 billion liras per year to finance the expansion and relocation of small stores. Meanwhile, it has announced that as from 5th August, 1982 shops may open for ten hours to be chosen between 7 a.m. to 20 p.m.. Details of these measures are laid down in Article 6 and Article 7 of the Decree-Law on VAT published on 4th August, 1982 in the official gazette.

In recent years, there has been a certain evolution in the Italian distribution system. Some Italian toy wholesalers, and even toy retailers have formed associations to import toys for the members. This kind of associations are also found elsewhere. For instance, in W. Germany, there are about 3,500 buying associations and cooperatives.

Cooperation between competitors are seldom heard in Hong Kong. On the contrary, there is a kind of love and hatred relationship between local manufacturers and exporters, in particular, between smaller ones. Thus, importers often succeed in playing manu-

facturers off against exporters with the result that the profit margin of both manufacturers and exporters has been diminishing.
Smaller manufacturers have to understand that commercial distribution has always been a part of any economy. If they handle exports themselves, they will have to bear the costs of commercial distribution themselves. It is not always economic and advisable for a small production unit to maintain an export team with adequate expertise.
On the other hand, exporter should realize that their roles, for which they are "remunerated", are no longer limited to passing on orders, keeping correspondence in English and preparing full set of documents. They have to update and upgrade their expertise and provide smaller manufacturers with adequate and updated market information, and even help locating suppliers of raw materials and machinery.
Marketing research, which should be interpreted in a broader sense, is useful for, inter alia, adopting an appropriate pricing policy.
Nine years ago, a garment manufacturer who has factories in Hong Kong and Singapore visited, perhaps for the first time, Paris. He told his importer: "Come on! I have seen my trousers selling at FF72.00 in a department store. Even if I raise my price by 50%, you still earn a lot of money." If he really thought so, then he was apparently unaware of the factors which have great incidence on costs, these factors being unfamiliar to Hong Kong businessmen.
Value added tax and contributions to social security that we have mentioned are two examples. The burden of taxation in Italy is, as in many other countries, heavier than in Hong Kong.
The rates of income tax, which is progressive, go from a minimum of 10% on net chargeable income of up to 3 million liras to a maximum of 72% on net chargeable income in excess of 550 million liras. Since the income tax is highly progressive, it takes away a substantial part of the cost-of-living bonus that Italian employees get by virtue of the "Scala Mobile". For the additional cost-of-living bonus payable as from August, 1982, (31,057 liras per month), persons earning 12 million liras per year get 20,143 liras while those earning 20 million liras get 18,725 liras only. No wonder "fiscal drag" is at present a very fashionable term in Italy.
The rates of corporation tax (I.R.P.E.G. – Imposta sul Reddito delle Persone Giuridiche) are as follows: 1974-1975: 35%; 1976-1981: 25%; 1982: 30%
However, three types of cooperatives benefit from a reduction of 25%, 50% and exemption respectively.

Other Taxes

Another direct tax, which does not exist in Hong Kong, is ILOR – Imposta Locale sui Redditi. This is a tax levied by local authorities on capital, farmlands, buildings, company profits, income from speculations and other casual activities. The rate was 15% since 1st January, 1977 and is 16.2% in 1982, an increase of 8%. Concerning ILOR, some tax reliefs are provided for, as in the case of income tax and corporation tax.
There is also a tax called I.N.V.I.M. – Imposta sull' incremento di valore degli immobili. This is a capital gains tax on immovable property (lands and buildings). For 1982, the maximum rates applicable to this kind of capital gains are 5%, 10%, 15%, 20%, 25% and 30% on capital gains of up to 20%, 50%, 100%, 150%, 200% and in excess of 200% respectively.
There are also succession duties, excise duties, stamp duties and over 30 kinds of registration fees.
Foreign investors are of course advised to consult an expert in order to have comprehensive and updated information on taxation in Italy. They should keep updating the information they have received.
It goes without saying that there is a number of anti tax evasion measures and devices provided for in the Italian legislation.
On 23rd July, 1982, a presidential decree was published in the official gazette. Pursuant to this decree, in case of suspected big tax evaders (over 100 million liras), senior officials of the Ministry of Finance and high ranking preventive officers may have direct access to bank and postal current accounts, savings accounts and life insurance policies. Banks, post offices and insurance companies are liable to a fine of 0.5 to 5 million liras for infractions.
Sealed cash registers will be implemented to complement the existing anti evasion instruments such as "ricevuta fiscale" (an official receipt for anti tax evasion purpose), bolla d' accompagnamento (a kind of delivery note for preventing tax evasion).
In spite of these instruments, the fines for "omitted" declaration on value added tax alone amounted to 1.176 billion liras in 1981, up 98.5% over 1980. It is to be noted that concerning tax declaration and assessment, there is a total of about 1,600,000 appeals still pending. A decree-law on a fiscal grace period and a mini-amnesty was passed in the Italian Parliament at the end of July, 1982. The law also provides for substantial reductions in tax payments if tax-payers and assessors disagree. Yet the Treasury expects to bring in about 10,000 billion liras as a result of this law.
Tax evasion is universal. But in Italy, the magnitude of tax evasion and the number of fiscal laws and anti tax evasion instruments seem to have formed a vicious circle. Perhaps the needs of forestalling tax-payers by blocking every imaginable way of evading taxes are partly due to a complex.
Once, commenting on a TV interview, an Italian young man said to me: "99% of the Italians do not know the ministers." This is not surprising, for at that time – in July, 1982 – Italy was having her 41st post war government with the previously shortest lived one being in office for 9 days. But he added: "The only honest Italian is Pertini. (Italy's president) He really makes the ministers tremble." (because of his uprightness?) While saying so, the young man definitely did not give me the slightest impression that he considered himself a disciple of Mr. Sandro Pertini.
Shortly after my arrival in Rome, an Italian businessman called me from a town near Bologna. The first thing he said was: "Watch your wallet!"
Nothing happened to my wallet. But something did happen to my poor legs. On 24th July, 1982, I was knocked down by a car in a zebra-crossing. A few seconds later, the driver was encircled by a crowd of Italians shouting "criminal" at him. Everybody including the driver wanted to take me to hospital. Since I did not want to go, the driver, who was one of the few long haired young men I saw in Italy, offered me a cup of tea and then, to my great surprise, left his name, address and telephone number with me, asking me to contact him if necessary. Thanks to the "incident", I have discovered a

second honest citizen for the Republic of Italy.

These are some anecdotes illustrating one aspect of the 'Italian' complex. Italy is now the only developed country which suffers from a complex of inferiority.

Italy is perhaps also the only developed country in the West, where the weight of public enterprises and enterprises with state interests is such that even the private sector reckons their strategic role in the Italian economy. In the proposal on a new industrial policy that the Confindustria – Italy's powerful employers' association – made in October, 1981, it is said that the (existing) mixed market economy (economia mista di mercato) is the best system ensure economic and social development in Italy.

In Italy, state intervention in the form of acquiring interests in private enterprises dates from the Great Depression between the two World Wars, when the IRI – Istituto per la Rico struzione Industriale – was set up to rescue three banks in financial trouble, i.e. Banca Commerciale Italiana, Credito Italiano and Banco di Roma. The IRI took over the banks' interests in industrial enterprises and put the three banks under its control. Subsequently, the IRI has extended its activities to many other sectors.

To have an idea of the dimensions of the public enterprises and enterprises with state interests in Italy, one may also refer to the government's annual report on the economic situation of Italy in 1981. (Relazione generale sulla situazione economica del paese, 1981.) However, public enterprises in Italy seem to have lost their dynamism. Deterioration and degeneration are the words frequently used to describe their present situation.

Recently Mediobanca has conducted a sample survey covering 1,176 private and public enterprises. The aggregate losses in 1981 of these enterprises amounted to 6,498 billion liras, of which 4,752 billion liras were reported from public enterprises.

Political parties are criticized for putting their own men into the management of public enterprises and thus giving rise to a bureaucratic enterprise which does not like very much innovation.

In the Confindustria's proposal mentioned before, it is also said that the Italian industry suffers greatly from external diseconomies. The Civil Service, public transport, posts and telecommunications are quoted as major causes of external diseconomy.

That is perhaps why Italian importers, when they need urgently a shipment, often specify that goods or samples should be shipped from Hong Kong to the airport of Zurich first. As a matter of fact, there are forwarding agents in Zurich which specialize in trucking goods to Italy. □

Departmental Stores Keep Pace With Changing Times

proved inventory control over a wider range of products now available for consumers everywhere from centralised warehousing.

Electronics are being employed. For instance, more accurate weighing, visible to the consumer, has been introduced through the use of electronics scales.

Hand-held electronic devices, called MSI, enable supermarket staff to walk through the aisles between rows of product displays punching-in needed replenishments. The device, plugged into a telephone line, automatically feeds into the warehouse computer.

Mr. Owen Price says the chain store and supermarket development has improved hygiene standards in food sales. Pre-packaging is replacing old methods of selling traditional Chinese products.

As a result of their rapid growth, supermarket chains are now large enough to import directly from overseas sources rather than relying on agents.

Mr. Owen Price says the supermarket in Hong Kong is different to those in Western countries. In the West, he says, supermarkets are located in the suburbs with large floor areas and lots of parking space. Customers usually make one major trip a week for their supplies and perhaps top-up with a second visit. In Hong Kong supermarkets are more likely located in the proverbial "High Street" with no parking and relying for their business on people living in surrounding high-rise developments who traditionally shop daily, not weekly.

Pricing

The chain-store development, Mr. Owen Price says, has tended to create a standard pricing structure for consumers, even in the New Territories. Price stability has followed better inventory control that has tended to eliminate temporarily-out-of-stock fluctuations which some retailers used to take advantage of by increasing prices.

Mr. Owen Price describes the supermarket in Hong Kong has a recent phenonmena. It's real growth, he says, has been in the last five years.

This is later than in most societies. He says it has to some extent come about because a need has developed for the convenience everywhere of a wider range of food supplies.

The increasing affluence of the population helped develop that need.

The supermarket, he says, as an industry is increasing employment opportunities in Hong Kong in terms both of numbers and careers. And it is an industry in which women are naturally taking responsibility. After all food is something they naturally know a lot about.

Mr. Owen Price describes Maxims which, like Dairy Farm, is a Hong Kong Land affiliate, as another application of chain store development in Hong Kong. It has 128 outlets organising the servicing of a different type of product to what the supermarkets are doing.

He says Dairy Farm has 91 Franklins supermarkets in Sydney and has in excess of 30% share of the market in that major Australian city. It spread to Melbourne last December and would begin in Brisbane in March.

Dairy Farm is also in Singapore with nine outlets of Fitzpatricks.

Hong Kong is participating in the first Asian Retailers' Convention in Tokyo in April. Mr. Owen Price sees this as indicative of the growing sophistication of local retailers. The Convention will be attended by representatives of most Southeast Asian countries, Australia and New Zealand.

Mr. Daniel Koo has taken a leading part in organising Hong Kong participation in the Convention. It has initiated, through the Management Association, the probable formation of a retail chapter in Hong Kong that could deal with problems affecting the retail sector and give a voice to retailing in the economy. □

The In-tray

New Members

Forty-eight members joined the Chamber in January :-

Acro Merchandise Co.
Al-Amin International Ltd.
Anavil Co. Ltd.
Bain Co., Ltd.
Beijer (Hong Kong) Ltd.
Citlin Trading Co., Ltd.
Colleen Handbags Manufacturer Ltd.
Concentric Electronics Co., Ltd.
Dai Sang Co.
Dielektra (HK) Ltd.
Elcap Electronics Ltd.
Expotex Manufacturing Ltd.
Fairmont Shipping (H.K.) Ltd.
Fairway Trading Co.
Faithful Enterprises
Far East Foundation Co., Ltd.
Flying Dragon Metal Products Fty.
Four Seasons Canning Fty. Ltd.
Golden Allied Ltd.
Grand Arts and Linen Co.
Kessel Electronics (H.K.) Ltd.
Kith Mutual Benefits Co.
Larry Jewelry
Maylite Bead Works Ltd.
Nam San Development Co.
P & A Co.
Pantec Asia Ltd.
Polyresources (Far East) Ltd.
Polytoy Manufacturing Co., Ltd.
Powing Trading Co., Ltd.
Promoters International
R.I. Overseas Ltd.
Resource International Marketing Ltd.
Rhino Watch Co.
Rudick International Ltd.
S.A.S. Industries (HK) Ltd.
Samex Industries Co.
Sincere Trading Co.
Space Lab (Hong Kong) Enterprises Ltd.
Styland Garments Ltd.
Tai Fung & Co.
Taikoo Sugar Ltd.
Tai Well Garment Factory Ltd.
Tienge Enterprise Development Co.
Toyo Advertising Co., Ltd.
Weston Electroniks Ltd.
Winfair-Wahing Ltd.
Winning Co.

Director Jimmy McGregor explains to 30 representatives of 26 new member companies how the Chamber can help them in business at one of the regular "Meet the Chamber" sessions on February 4.

Miss Kagoshima calls on the Director, Mr. Jimmy McGregor, and Miss Cecilia Fung, Assistant Director for Industry, during a tourism exchange promotion mission to Hong Kong from Japan's southern prefecture. Mr. Yasufumi Matsubayashi, the mission leader, is between Miss Kagoshima and Mr. McGregor who is admiring a picture of Kagoshima.

New Zealand Tops

In an article headed "Australia Now Hong Kong's Fastest Growing Supplier," *The Bulletin* in its February issue said: "Even more recent figures supplied by the Hong Kong General Chamber of Commerce show that the 10 months ended October, 1982 imports into Hong Kong from Australia showed the largest growth of any country (an increase of 14%) compared with the same period in 1981."

The New Zealand Commission in Hong Kong has drawn our attention to New Zealand's performance in the same period. NZ exports were up 20% last year against Australia's 14% and total trade growth between Hong Kong and NZ exceed Australia's by 13%.

Governor Sir Edward Youde addresses the committee members' dinner ... old strengths remain augmented by new strengths.

Sir Edward Reminds Chamber Committee Members of Hong Kong's Strength

The Governor, Sir Edward Youde, reminded Hong Kong General Chamber of Commerce committee members not to underestimate "our own strengths which had brought us through difficult times before" when he addressed the annual committee members' dinner on January 21.

Sir Edward said few economies are as flexible or can adjust with the same speed. In recent years Hong Kong's managerial and professional resources have been greatly strengthened and the training of its work force improved. The economy has been diversified and the range of the financial facilities it can offer has grown.

These strengths have been added to the natural and other advantages which have brought Hong Kong through difficult times before — the enterprise of its entrepreneurs, the willingness of the work force to work hard, government policies conducive to development of private business as well as social good and its position as an international communications centre.

Sir Edward said there are some enterprises which are in real difficulty but there are far more which are strong, prudently managed and creative in the face of adversity. The old strengths remain and are augmented by new strengths developed over the last decade.

The Governor paid tribute to those many companies, banks and organisations, both in Hong Kong and overseas, which have demonstrated their faith and commitment not only in words but by new and direct investment, by the extension of the financial facilities they offer and by their expansion of their operations.

He said over the last six months four major international companies had announced plans to invest in Hong Kong. Two major banks have announced major building redevelopment plans. Four new bank licences were successfully applied for by foreign banks. Sixteen overseas-owned or partly overseas-owned factories are known to have established and commenced operations in Hong Kong and 115 foreign companies have established branch offices in the same period.

"It is therefore well to remember that if the weather is rough, the ship is sound," Sir Edward said.

Mr. John L. Marden, General Chamber chairman, said 1982 was a momentous year for Hong Kong in which the longest and deepest recession the world has known in the past half century at last pulled the Hong Kong economy into its dark embrace. Trade and industry have been placed under great stress, our internal development and systems which support it have also suffered and some of our cherished social objectives have seemed more distant.

On top of these predictable developments, the opening of negotiations on our long term future has given rise to very considerable concern and speculation. The effects had been significant and to those whose business life is based on an almost daily assessment of the risk factor, hardly surprising.

Chamber chairman Mr. John L. Marden says in his address: "Uncertainty is the enemy of stability and stability is the keystone for Hong Kong's prosperity."

Mr. Marden said uncertainty is the enemy of stability and stability is the keystone for Hong Kong's prosperity. But he went on to pledge the Chamber's loyalty to the Government and expressed the belief that the negotiations now going on will provide Hong Kong with a continuation of its present economic system and that by doing so Chamber members "shall be given the opportunity to contribute further to the development of this great territory." □

The Governor chats with Chamber chairman Mr. John L. Marden and vice-chairman, Mr. Jack Tang (right) at cocktails before the annual committee members' dinner.

Trade in Progress

Hong Kong Overall Merchandise Trade (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981	% Change
Imports	128,849	125,377	+3
Domestic Exports	74,641	72,641	+3
Re-Exports	39,856	37,840	+5
Total Exports	114,496	110,481	+4
Total Trade	243,346	235,858	+3
Balance of Trade	-14,351	-14,896	-4
Visible Gap as % of Total Trade	5.9	6.3	

Imports : Major Suppliers (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981
China	29,451	26,436
Japan	28,388	29,073
USA	14,061	13,257
Singapore	9,318	9,616
Taiwan	9,254	9,751
UK	6,195	5,730
South Korea	4,046	5,009
Fed. Rep. of Germany	3,154	3,059
Switzerland	2,371	2,586
Australia	2,073	1,847

Imports : Major Groups (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981
Raw materials	51,050	50,776
Consumer goods	34,493	33,359
Capital goods	18,066	18,394
Foodstuffs	15,108	13,165
Fuels	10,133	9,683

Domestic Exports : Major Markets (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981
USA	28,263	26,489
UK	6,363	6,873
Fed. Rep. of Germany	6,115	6,169
China	3,389	2,535
Japan	2,912	2,697
Australia	2,576	2,467
Canada	2,350	2,130
Singapore	1,767	1,583
Netherlands	1,461	1,397
France	1,336	1,323

Domestic Exports : Major Products (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981
Clothing	25,637	25,154
Toys, dolls and games	8,482	6,666
Watches	4,917	5,232
Textiles	4,476	4,809
Radios	3,238	3,519
Electronic components for computer	1,424	1,978
Handbags	998	1,009
Hairdryers, curlers and curling tong heaters	942	825
Electric fans	865	1,200
Footwear	670	742

Re-exports : Major Markets (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981
China	7,192	7,169
USA	5,079	4,332
Indonesia	4,102	3,861
Singapore	3,263	2,980
Taiwan	2,432	2,215
Japan	2,338	2,544
South Korea	1,531	1,268
Macau	1,421	1,253
Philippines	1,356	1,161
Saudi Arabia	841	529

Re-exports : Major Products (HK$M)

	Jan.-Nov. 1982	Jan.-Nov. 1981
Textiles	5,859	6,351
Chemicals and related products	3,531	3,252
Electrical machinery, apparatus and appliances and electrical parts	3,116	2,809
Photographic apparatus, equipment and supplies and optical goods, watches and clocks	2,834	3,079
Articles of apparel and clothing accessories	2,695	1,994
Crude materials, inedible except fuels	2,694	3,022
Food	2,587	1,893
Non-metallic mineral manufactures	2,353	2,515

Values and volume - monthly progress (HK$M)

	Imports		Domestic Exports		Re-exports		Total Trade
	$M	Quantum Index (1973:100)	$M	Quantum Index (1973:100)	$M	Quantum Index (1973:100)	$M
1979	85,837	176	55,912	175	20,022	184	161,771
1980	111,651	209	68,171	195	30,072	253	209,894
1981	138,375	233	80,423	210	41,739	324	260,537
Monthly Average 1981	11,531		6,702		3,478		21,711
		(1981:100)		(1981:100)		(1981:100)	
Jan.1982	10,023	81	6,239	91	3,319	87	19,581
Feb.	11,220	91	4,694	67	3,597	93	19,511
Mar.	12,178	99	6,577	93	3,714	96	22,469
Apr.	12,302	101	6,541	93	3,589	93	22,432
May	11,340	94	6,854	97	3,760	99	21,954
June	11,714	98	6,953	97	3,451	91	22,118
July	12,376	104	7,680	106	3,578	94	23,634
Aug.	11,583	96	7,742	106	3,613	95	22,938
Sept.	11,826	99	7,218	101	3,723	99	22,767
Oct.	12,218	99	7,087	99	3,615	96	22,920
Nov.	12,199		7,148		3,939		23,286

Area Comparison (HK$M)

	Imports Jan.-Nov. 1982	Domestic Exports Jan.-Nov. 1982	Re-exports Jan.-Nov. 1982
Asia (excluding China)	58,595	8,694	19,066
China	29,451	3,389	7,192
West Europe	18,860	20,905	2,839
(EEC	15,642	17,178	2,174
North America	15,077	30,614	5,396
Australia	2,073	2,576	624
Africa	980	2,318	1,637
Middle East	1,574	3,210	2,004
Latin America	860	1,908	731
Rest of World	1,379	1,027	367

本會動態

本文內容乃摘錄自執行董事麥理覺向理事會及其他工作委員會發表之每月報告

財政——未經審核之八二年度帳目

本會八二年度的最後財政結果於除稅前有盈利三十五萬三千元。由於八二年在多方面都是特別艱難的一年，而本會在節省費用及提高生產力方面的努力卻相當成功，本人爲此感到很高興。本會會務於八二年內十分繁忙，而會費收入之增加，足證本會服務深受會員歡迎。

會員

一月底會員機構總數爲2,912 家。本會曾大力推行十次招募運動，對象爲使用本會簽證服務之機構。結果共有455 家公司於八二年加入本會。一月的另一次招募運動使新會員機構增多48家。這些新會員將抵銷八二年內流失之會員數目。

本會訪英團三月七日至十一日

協助本會安排訪英行程及宣傳事宜之多個英國團體均傳來良好反應。本會直接致函之英國公司與各商會對於會晤訪英團亦表示有高度興趣。

本會一百二十家會員機構已向本會提供彼等有興趣與英國工商機構進行貿易之有關資料。資料現經本會整理，本人深信訪英團將達成不少良好的新業務接觸。

紡織業委員會

本會紡織業委員會會員將於短期內集會，評論政府的紡織品配額管制制度。會員意見將轉達予政府的紡織業諮詢委員會及貿易處。

中南美洲區委會

委員會於一月十四日集會，評論中南美洲的現況，並建議本會應嘗試組織貿易團於八三年九月或十月期間往訪該區。

中國

本會訪華團三月九日至廿二日

在本會中國委員會建議下，訪華團的行程再經修改，以昆明代替廣州。整個行程現包括北京、西安、成都與昆明。有關組織細節於一月十三日的集會上經有所討論。

此次訪問目的是爲確立香港與中國之間在業務利益、投資機會及進一步的合作可能性方面有較佳了解。

北京訪問團

本會轄下中國委員會及本會行政人員於一月十四日假本會會議廳接待來自中華全國工商業聯合會的十六人代表團，雙方並交換有用意見。

廣東投資研討會

工業部應粵海企業有限公司之邀，於一月廿八日假本會會議廳安排兩次研討會。廣東省經濟委員會一個六人代表團在副主任張楓先生領導下，向與會的百名本會會員介紹超過一百多個投資項目。

中國八三年度之「國外財經建設交流會」

工業部助理董事馮若婷應主辦者之邀，於一月二十日假廣州舉行之交流會上，以「香港在中國的投資經驗」爲題發表演說。出席者有二百多位來自中國各市官員。

中東商業團

本會與貿易發展局合辦的中東商團已有十四家公司肯定參加，其中一半爲本會會員。該團將往訪巴林、馬斯喀特、達曼及利雅德，日期爲三月十四至三十日。貿易部經理趙公正將隨團出發，爲團員提供協助。

貿易服務

一月份貿易部共接待了四十四位海外商業訪客，以及安排了六百四十二項業務接觸。資料統計組完成了八二年一至十月香港整體商品貿易的分析，以及處理了五十五項會員提出有關貿易統計資料的詢問。月內貿易部處理了1,030 宗貿易諮詢，其中133 宗由貿易發展局轉達本會。 □

香港零售業的演變

集聚式的零售方式，無論是超級市場或現代化新型購物中心，已經在香港演變而成，主要是基於七十年代末期經濟蓬勃年間港人收入較高、通常開支如租金之類戲劇化的上漲、以及本地生活方式的步伐加速所致。
現時經濟衰退對消費者的選擇可能有所影響。消費者由注重物品的形象轉至注重其價格是否相宜。這並非向後倒退，不過若干零售商品方法卻可能開始改變。

香港一家超級市場的收銀處。

香港市場研究社常務董事鄧桂能先生表示，近年香港零售業方式的主要轉變在於超級市場的增長。他認爲沒有多少人知道超級市場增長的程度及重要性。

在一九七五至七六年間，香港約有一百家超級市場，七八年已增至二百五十家，八〇年爲三百三十家，至八三年已增至四百五十家。

從數字來看，若與香港總共16,000個食品及家庭用品零售分銷處的數目相比，超級市場的數目不算多。不過如果談到食品的實際銷流情況，則超級市場在香港的增長是相當引人注目的（見表一）。

現時港人所購全部物品中，超過一半是由超級市場供應的。這種改變中的銷售方式爲消費者提供較大利益。

表一
超級市場購物率

	78年	79年	80年	81年	82年
	%	%	%	%	%
洗髮水	37	47	47	57	67
護髮素	—	—	46	58	69
香　皂	24	41	41	53	60
洗衣粉	19	35	36	45	50
洗潔精	13	30	33	42	50
食用油	11	22	26	39	47
牙　膏	23	37	44	55	60

資料來源：香港市場研究社

表二
購物者光顧超級市場次數

	%
一星期至少一次	48
一個月一至兩次	29
一個月少於一次	16
從不光顧	7

資料來源：香港市場研究社

鄧氏表示，超級市場興起，導致香港較爲傳統的分銷方式——中式雜貨舖——不再處於主要地位。很多已經停業或者只是苟延殘喘。

究竟是甚麼消費者利益令到香港大衆改變傳統的購買習慣呢？

鄧氏表示，超級市場提供很多方便。其中之一是它們出售的物品應有盡有，包括快速易煮食品如即食麵以至冷藏點心，奶粉以至即溶咖啡等。

另一個方便之處是鄧氏所說的「集聚式」營業手法。消費者需要的東西都可以在一個地方購買得到，而且這裏的陳設是開放式的，消費者可以隨便選擇。在此之前，消費者須到多個地方購買食物及家庭消費品。

鄧氏表示，超級市場的物品一般都比較便宜，也較爲新鮮。零售存貨的點算顯示貨物銷流量較快。此外，購物的環境較佳。超級市場都有空氣調節，陳設較好，看來較潔淨。

鄧氏預言「集聚式」經營法將擴展至香港傳統的服裝店、電器用品及私人耐用品（手錶與攝映機）商店。這些店舖已可見於大型的購物中心，如海洋中心、太古城中心、以及售賣上價貨爲主的置地廣場（該處也有一個超級市場）。

這些地方爲消費者提供重大利益，既方便又有多種選擇。由於同是商場中心，所以競爭性也相當高。

鄧氏說香港人喜歡熱鬧。其他地區的人士可能喜歡避開人多的地方，香港人卻不然，這裏的人並不怕人羣，他們似乎能夠互相吸引。

因此這些商場中心便開始迎合整個家庭。它們爲小朋友提供娛樂設施，讓父母可以安心購物。

鄧氏認爲這些商場中心與超級市場

銅鑼灣的購物中心。

購物中心內的快餐店。

正好配合香港的生活節拍。他說大多數人都喜歡辦事快捷。他們的生活這麼忙碌，實在缺乏多餘時候。

購物習慣因而有所轉變以適應現代需求。市場調查的工作就是找出現有及潛在的消費者需求。現時市場調查正向零售商顯示他們應該爲現代人士提供怎樣的消費者利益，從而爭取更多顧客。

像美心、麥當勞等飲食機構的成功，證明了「方便」的因素在香港轉變中的生活方式是何等重要。

鄧氏指出，香港是一個華洋混雜的大都市，現在比以往更有過之而無不及。在很多方面香港都是追隨美國的模式。

不過，香港雖然更趨於大都市化，本身卻依然相當傳統的。因此可見快餐店除了供應西式簡便食品外，亦有中式快餐供應。

鄧氏表示，現時的商店售賣的是整件產品，不單是食品或其他貨物，更且出售他們的服務——由訓練有素的職員提供他們的友善服務、效率與水準。

鄧氏又指出，男士購物的現象愈來愈普遍。婦女雖佔香港大部份購物人數，但男士作爲購物者的重要性益增（見表三）。

鄧氏說原因是由於香港有很多已婚的工作婦女。家居責任往往由夫妻共同分担，因此零售商不能忽略男性購物者。

鄧氏指出，百貨公司是「集聚式」經營法的最古老方式。現時百貨公司正跟隨時代前進，迎合消費者的購買習慣。很多百貨公司現時都設有超級市場便是一例。

他說百貨公司經營者並不是呆坐等待生意找上門的。他們都積極推廣業務，大力宣傳。只有百貨公司及鏈瑣商店可以負担得起這些開支。

它們還享有其他好處。譬如在批發購進物品時它們有更佳的討價還價能力，又可以要求較理想的賒購條件。

鄧氏又表示，其他地區一種新發展暫時還未傳到香港，這便是「自動標簽」。譬如說，較小型店舖聯合起來共同批發購進物品，然後以同一標簽零售這些物品。超級市場亦可以採取同樣做法。

他認爲「自動標簽」在香港尚未興起的主要原因，是由於產品的形象在香港很重要。要推行自動標簽，最初須花錢從事昂貴的宣傳。即使這樣亦可能難以推行。其他市場則比香港較爲注重價格。

這引致鄧先生留意到另一點有趣的地方。他說，香港人選擇消費品，受到他們收入的影響多於產品的實際價格。這跟香港的繁榮有關，特別是在七十年代後期及本地生產總值的增長偏高所致。

消費者多喜歡根據產品的牌子與形象而從事購買。不過他表示，如果在目前的經濟衰退時期本地收入停止增長，則他懷疑價格會成爲重要因素，就像別處地方一樣。

鄧先生表示，現代化零售分銷處在新界的增長不及人口轉移往新界的比例。不過他相信新界新市鎮有很多機會給零售分銷處發展，產品形像尙屬次要，最主要是有普通的家居用品。

香港大學工商管理學系講師羅倫先生表示，香港人口之中十五歲至六十四歲經濟能力活躍者，差不多近八成在過去四星期內曾涉足超級市場。這種購物習慣的改變在各個年齡階層都比較固定，惟有五十歲至六十四歲的年齡階層除外。

他說超級市場比「濕貨」市場更受歡迎，所謂「濕貨」市場是指市政局轄下的街市。這是因爲大多數家庭都有雪櫃，消費者不必每日上街市兩次選購新鮮食物。

此外，「濕貨」市場不及超級市場那麼高級。年青家庭主婦不再堅持食物怎樣才算新鮮的傳統標準，很多都改而光顧超級市場。一般人對罐頭食品的態度亦有所改變，開始樂於食用。

至於零售業的其他方面，羅倫先生認爲小型批發商（大批零售者）是一項有趣的發展，當然還有購物中心的崛起。

他說租金高昂的問題正打擊著小型店舖如家庭電器用品店之類。它們須設法增加存貨種類以提高利潤。除此以外

表三
男士購物比率

	80年 %	81年 %	82年 %
護髮素	14	17	19
香　皂	15	15	21
洗髮水	14	18	22
牙　膏	16	15	21
洗衣粉	12	13	19

資料來源：香港市場研究社

市場研究者鄧桂能

現年卅九歲的香港市場研究社常務董事鄧桂能，正是香港年青華人商家怎樣利用其學術知識與技能改變香港零售商品業、提高水準的一個良好例子。

鄧氏於香港大學取得經濟學碩士學位。他專門研究經濟發展，其論文正是有關食品消費，研究食品消費與收入類別及價格變動的關係。他說那是連續時間性的研究。

在香港大學從事學術研究及教學工作兩年後，他加入香港電台一個短時期，担任公共事務工作，於一九六九年到香港市場研究社履新。

鄧先生曾任香港市場調查學會的主席，現時是消費者委員會成員，並是該會的調查及研究籌委會主席。

身爲香港市場研究社常務董事的鄧先生還須兼顧該社在台灣的工作。該社更獲協議在廣東進行市場調查，鄧先生形容這是一個重大的機會與挑戰。

香港市場研究社於香港聘有一百五十人，進行研究、紀錄資料及利用電腦分析資料。

鄧先生表示他有責任將香港市場研究社轉變爲香港一家中型公司。

，它們正開始使用較大的舖位，或擴展至超過一個以上地區營業。

羅倫先生認爲小型店舖不再符合經濟原則。租金、勞工及所有固定通常開支上漲程度之高，使零售商必須售賣較大量貨物，始能維持業務。他指出，若以每平方米計算，在百貨公司經營零售業務比小型商店更爲化算得多。

新鴻基地產代理有限公司最近指出，有跡象顯示大零售商正利用租金下降的機會擴大分銷網，而小型商行亦可能快將開始再次染指零售業。

新鴻基地產顧問范和夫先生指出，目前店舖供過於求的現象，表示買家與租戶可以有更多選擇，要求也可以較爲嚴格。

他說商舖租戶尋求的是長期租約，特別是由一名業主全權擁有的購物中心。他們比以前要求更多的保證，例如購物中心內售賣同一類貨品的商店不應超過一家。如果大業主把商舖出售，租戶便不可以有上述保證了。租戶同時亦要求購物中心有完善的管理、地點適中、價格合理及優良的建築水準。□

百貨公司與轉變時代的步伐看齊

香港的零售商店近年間有８％的增長，即現時大約有45,000家形形式式的商店。

同期間零售業的就業情況有６％的增長。如果配合八二年中期的統計數字，則相信有超過16萬人在香港的45,000家商店工作。比較之下，在香港48,000家工廠工作的人數則超過90萬人。

香港的小型商店特別多。有關零售業對香港本地生產總值所付出的貢獻有多少，並無直接的估計，有的也只是包括了所有分銷、零售與飲食服務的估計。

如以三者整體計算，則去年共佔本港生產總值約22％。零售業本身也許佔16％。不過本港商店每年爲本地生產總值所賺取的利益是否能充份反映它們對本港的價值呢？

瑞興百貨有限公司董事長古勝祥表示，零售業的社會與經濟價值十分重要，一方面照顧到我們日常每一方面的物質需求，又爲社會與經濟帶來良好的影響。

他說香港的商店跟市民的生活息息相關，影響到生活程度及社會習慣。市民的需求亦影響到商店的營業方針。

舉例說，香港人認爲時間非常寶貴。他們的生活節奏都很快速，如果購買物品干擾到他們日常的生活程序，他們會顯得很不耐煩。

古先生說香港人的知識水平愈來愈高，他們花錢都要物有所值，不會再受到詐騙的了。

商店在提高香港人的生產力方面，扮演著一個重要的角色。古氏說，如果一家新商店在屋邨內開張，往往會爲屋邨居民帶來一陣興奮與好奇，特別是如果該家新商店擺賣的都是一些美觀實用的家居或個人用品，則會更受歡迎。

從商店得來的反應，知道潛在性的顧客爲了有能力購買那些足以提高他們生活程度的物品，往往會更加勤奮工作。因此商店便產生了激勵勞動人口的作用，導致生產力亦因而提高。

古氏指出，由於香港是自由港，競爭自由，政府極少干預，因此香港經銷的貨品可謂應有盡有。這令到香港認識到其他國家人民的創新發明，使香港本身的產品亦趨於高級精巧。

古氏認爲零售業除了迎合社會的主要物質需求外，可爲經濟發展負起一個較爲微妙的補足作用。他表示這個補足作用說明了爲甚麼香港現時的失業率只有４％而一些較發達國家的失業率達10至12％的一個原因。

永安公司常務董事郭志仁博士表示，永安剛在尖沙咀東部開設了一家36,000平方呎的新分店，盡佔全層面積，爲香港提供多種平價物品。

郭博士表示他們是從顧客的購物習慣最近有所改變而觸發起開設這家新分店的意念。顧客現時尋求的是更合化算的購買。

永安公司從營業數字中偵察出這個趨勢。郭博士解釋說，營業量不錯是有所上升，不過交易的次數上升更快。這顯示每項購買的金額較低，而花在選購較不昂貴物品的金錢則更多。

他認爲昂貴的精品店除非有十分穩定的顧客，否則很快會受到生意不景的打擊。

郭博士並概述了近年在零售業的其他轉變。他說兒童用品的銷量正穩定上升，因此現時有這麼多玩具店與兒童用品店開設。

他說究其原因，是由於香港趨於小家庭政策。每個家庭的子女不多，因此父母可以有能力爲子女花更多錢購買較好的物品。

另一個趨勢是由於顧客的知識水平愈來愈高，令到自助服務較易爲人接受。以前售貨員要向顧客解釋一切，現時顧客自己看英文標簽便明白物品的用途。

郭博士又說，由於有地下鐵的服務，購物者到各處購物也很方便。永安便經常見到來自荃灣區的顧客在尖沙咀購物。以前，商店的生意大部份來自與附近居民的交易。

郭博士認爲，隨著地下鐵的發展，購物地點亦會繼續有所改變。此外，汽車亦增加了購物者的流動性。就以永安總店爲例，該店逢周末免費爲購物者提供泊車位，方便顧客從遠道而來。

郭博士表示，永安爲香港人提供方便的購物服務，以適應香港人轉變中的生活方式。他說他所指的方便是包括了地點與貨式兩方面。

他說永安一向自誇爲全港最完備的百貨公司，現在仍然一點也不假。不過以前永安只有一家完備的商店，如今卻有八家。該公司在六十年代初期開始擴展業務，於近年蓬勃年間更是突飛猛進。原因？人口增加及日益富裕。

永安的作風並沒有多大改變，只是採用了更現代化的管理技巧與技術。該店仍然以中層及中上階層人士爲顧客對象。其顧客多爲本地人，而該店爲他們提供較爲基本的物品。

郭博士表示，永安的貨品有八成是進口貨。由於永安是相當完備的商店，迎合到顧客的基本需要，因此永安認爲該店較諸一些專門商店更能經得起經濟不景的風浪。

他形容永安是傳統家族式的事業，目的是爲本港居民及遊客提供購物方便，亦爲其屬下一千七百名僱員提供穩定就業機會。

統計處每月都進行零售業銷售情況的調查。最近可得的統計數字是去年十一月該處發表的臨時數字。

該月零售業的營業總值估計爲44億7,900 萬元。十一月的整體營業價值指數跟上月相比上升了一點或百份一，惟與八一年十一月相比則保持不變。

八二年十一月的整體零售營業量指數爲一〇五，與上月相同，惟與八一年十一月相比則下降八點或百份七。

上述統計數字足可支持郭博士的意見，就是購物者正尋求更合化算的購買，同時價格在香港零售業之中比形像來得更重要。

統計處去年十一月發表的數字證實了百貨公司的零售業務以價值計比上月增加了７％，以數量計上升了６％。不過十一月超級市場的零售業務以價值計則下跌了６％，以數量計則下跌了７％。

□

香港的失業數字

當政府統計處按季公佈香港的失業與半失業數字時，一般外行人均以懷疑的眼光加以嘲弄，而若干勞工團體更直截了當的表示不信任。
很少人知道現時根據綜合住戶調查所做的統計是很專業化的，足以媲美世界上其他國家的統計。同時在計算半失業率方面，香港是獨一無二的。

英國有一種簡單、廉宜以及實際的方法用以計算失業數字，做法是統計一下登記領取失業救濟金的工人數字，然後每月發表總數。

上述數字並不包括沒有資格領取失業救濟金的失業人數，卻包括了一些已有工作而竟然仍繼續領取救濟金的人士。至於半失業工人的數字則英國當局並沒有進行調查。

法國與西德計算失業人數的方法跟英國類似，而這三個已發展歐洲國家都是每年進行一次勞動力調查的。

如果香港每月像英國、法國與西德那樣計算失業人數，則去年十月香港的失業人數爲704 人，半失業人數爲1,551人。

這分別是領取港府全部公共援助及部份救濟金的工人人數。（後者之所以須要領取部份救濟金，是由於他們的收入太低，不能單靠自己的收入養妻活兒。）

不過，根據政府統計處一月發表的數字，八二年八月至十月一季的失業人數爲106,700 ，另有42,000半失業人士，而十五歲以上的全部勞動人口則約爲250 萬。

這些統計數字是政府統計處每季向15,000個香港住戶約55,000人進行綜合住戶調查所得的結果。統計處聘有102人負責向這些住戶進行抽樣調查，雖然只是隨意抽樣，卻有充份的代表性。他們每三個月調查一次，然後計算結果。調查所得的反應達98%，每年約耗用400萬港元。

該項住戶調查始自一九六一年，當時香港初次嘗試在其戰後第一次人口普查中估計就業人數。就業人士的年齡定爲六歲及以上，工作小時定爲二十日內不少於四十小時。

在一九六六年的人口中期調查中，就業人士年齡降至五歲及以上，不過至一九七一年第二次人口普查中，年齡限制提高至十歲及以上，而工作小時的標準則爲七日內至少十五小時。在一九七六年的人口中期調查中，年齡限制再提高至十四歲及以上，工作小時標準定爲七日內十五小時。

不過在一九七五年九月，統計處另展開一個勞動人口調查，年齡定爲十五歲及以上，工作小時定爲七日內十五小時。這項調查應用人口普查所採取的定義，每六個月進行一次，直至一九八一年的人口普查後，便開始採用目前的綜合住戶調查方法，這個方法是根據國際勞工組織的定義，每季發表調查報告。

這個每季一次的住戶調查可比諸美國根據六萬個住戶而進行的每月調查，不過若干定義有些少改變。日本、加拿大與瑞典亦根據國際勞工組織的定義而進行每月調查。澳洲與意大利每季均進行類似的調查。

不似得香港那樣，已發展國家一般都不計算半失業數字。最初制定半失業數字這個概念是爲發展中國家而設，因爲發展中國家的鄉村人口具有特殊情況。至於失業的傳統定義是針對工業社會而言，對發展中國家的意義不大。

所以某一個數字，例如菲律賓有4.5 %失業率，或印尼有1.5 %失業率，在馬尼拉及耶加達等城市可以說得過去，卻並不適用於鄉村的耕種農人。據悉某些東南亞國家已進行試驗，以求達到較具意義的失業與半失業數字，不過香港將是率先定期發表統計結果的地區。

統計處所發表的八月至十月一季內的綜合住戶調查報告顯示，香港的失業率是勞動人口的4.2 %；經按照季節性影響而調整的失業率則是3.8 %。

統計處對半失業人士所下的定義爲，在進行統計前一星期工作少於卅五小時而正在尋求更多工作者，或是以爲沒有工作可做而不去尋求更多工作者。

根據每週工作卅五小時的標準，統計顯示在每週工作少於卅五小時的9.3 %勞動人口之中，有1.7 %是半失業者，其餘的是自願工作少於卅五小時，譬如本身是家庭主婦或是六十歲以上的人士。

不過有關統計數字，香港人也有很多偏見與誤解之處。在一九七五年之前失業數字雖然不存在，不過這並不表示現時人們會接納失業數字。如果統計結果良好，可能被人看作只不過是政府的宣傳手法。

政府的統計人員所採用的統計方法

表一　失業、半失業與工作小時

	失業率（經季節性調整）勞力人口調查定義 %	失業率（經季節性調整）綜合住戶調查定義 %	每週工作少於三十五小時僱員的 半失業率 %	每週工作少於三十五小時僱員的 百分率 %
1971（人口普查）	4.5●	—	—	—
1975　9月	8.6	—	—	—
1976　3月	5.6	—	1.9	7.2
9月（76年8月人口中期調查）	4.2	—	1.9	—
1977　3月	4.4	—	1.6	9.2
9月	3.6	—	1.2	7.0
1978　3月	3.0	—	1.0	7.8
9月	2.4	—	0.7	7.3
1979　3月	2.3	—	0.5	5.6
9月	2.7	—	—	6.5
1980　3月	3.2	—	—	6.4
9月	3.8	—	—	7.9
1981　3月（人口普查）	4.1	—	0.3 *	8.5
* * 8月—10月	3.6	3.5	—	13.0
11月—82年1月	3.1	3.0	—	10.7
1982　2月—4月	3.5	3.4	—	15.6
5月—7月	3.4	3.3	—	9.2
8月—10月	4.0	3.8	1.7	9.3

●包括軍人、暫居人士及水上居民；未經季節性調整。
*不包括以爲無工作可做而不找尋工作之人士。
* *由一九八一年八月至十月一季開始，所有數字均得自「綜合住戶調查」，以取代「勞動人口調查」。綜合住戶調查數字是三個月期間的每週平均數字，勞動人口調查數字則是兩週內的每週平均數字。統計處數字是人口普查期間的每週平均數字。

與定義，對門外漢來說，只不過是官樣文章。有些人甚至認爲政府可以玩弄數字。

社會人士對於計算失業與半失業數字的專業知識所知不多，也不知道統計員是有他們的專業道德的。一般人只知統計員提供失業數字的時候，總是遲了兩個半月。

這種延誤是可以理解的，因爲統計員須花時候把數字計算，不過若干勞工團體有時卻以此爲話題，認爲數字的發表是特意拖遲至某一個階段，以減輕失業情況惡化所帶來的衝激。

作者執筆撰寫本文之時，正值歲晚時候。一般來說，若干生意不景的工廠會利用農曆新年假期爲藉口，於年假過後不再開工，或延至經濟情況好轉後才復工。

是以有關去年十月失業率與半失業率偏低的好消息，於兩個半月後即八三年一月中發表，便受到社會人士諸多抨擊了。

不過統計處的數字並無差池之處。於是評論者並不是挑剔統計處進行綜合住戶調查所用的方法，而是指摘統計處發表的半失業率數字竟比失業率數字爲低，他們認爲並不符合邏輯。

統計處處長祈理富先生曾於一月出席電視節目兩次，要求批評統計處的人士提供同樣專業化的調查，不過評論者並沒有接受他的「挑戰」，老是拿出同一個爭論，說半失業率數字偏低是不符合邏輯的。

祈理富表示，唯一不符合邏輯的是這些評論者自己的感覺。該兩個數字是鐵一般的事實。由於評論者有先入爲主的不信任觀念，因此運用邏輯也於事無補。失業與半失業人數的關係，視乎以下的情形而定：

甲）員工因公司停工而失業；

乙）公司開除員工，作爲度過艱難時期的「勒緊褲頭」措施；

丙）公司不開除員工，改而縮短工作時間，作爲「勒緊褲頭」共度時艱的措施。

表一由統計處提供，顯示自一九七一年人口普查以來本港的失業情況（新與舊定義兼備）、半失業情況（如有資料的話）、以及每週工作少於卅五小時的人口比例。數字顯示失業率一向都超過半失業率。

祈理富表示他並不感到驚奇。香港人一般都認爲商號寧可縮短工作時間也不想辭退員工，不過這只不過是短期性的選擇。

除非業務在短期內好轉，否則這些商號便會被逼辭退若干員工，免致面臨全面停工，那樣所有工人都會失業。

祈理富繼續答覆基督教工業委員會的指摘，該會指稱統計處八一年轉向採取一種失業的新定義，以掩蔽眞正的失業情況。祈氏說如果該委員會人士肯花時間閱讀統計處就綜合住戶調查所發表的刋物（他曾寄上多份有關刋物予該委員會），他們當不會有上述指摘。

祈氏表示，雖然統計處轉用一個新定義，不過該處發表的失業統計仍有採用舊定義，以便各人可以知道改變所帶來的分別。答案是分別不大，頂多是0.2%。

祈理富解釋說，新定義跟隨國際勞工組織的建議，亦是很多其他國家所採用者。舊定義可追溯至一九七一年的人口普查，後來一九七五年的第一次勞動人口調查亦採用這個舊定義，因爲當時的失業情況比現時更爲嚴重，所以有必要跟最近的對上一次統計作個比較。

南華早報的一篇社論亦不接受祈理富先生的半失業率數字。

該篇社論形容統計處對半失業所下的定義是「統計員的遁辭」，並指出事實始終是事實，除了十萬名失業人士之外，還有廿五萬人是每週工作六日，每日少於六小時的。

祈理富先生反駁說：「這並不是我們的遁辭，而是多個國家多位資深人士在計算勞動人口方面的審愼結果。他們的計算方法是國際勞工組織所接受及推許的。

「這些人士不單只包括統計員，還有社會學家、經濟學家及其他學者。不過，最終主要是靠常識多於學術知識。

「我相信採取一種定義是必須的，道理也至爲明顯，而有關採用何種定義總有多少爭論，這點也是事實。

「以半失業的定義而言，應該怎樣界定短暫工作小時呢？卅五小時、四十、四十五、還是別的？有見及此，最重要的是選擇一個定義，以後一直沿用，以便經過一段時間後可以計算出有多少改變。」

祈氏繼續說，如果將半失業的定義定爲所有每週工作少於卅五小時的人士是不合理的。

「如果一名妻子選擇留在家中打理家務而不出外工作，我想統計師或任何人都不會視她爲失業。

「如果一名妻子選擇做兼職，因爲她不想從事全職工作，那同樣她不應被視爲半失業……」

在答覆南華早報的評論，說勞工團體從各自調查的結果所得，深知半失業率應爲兩位數字時，祈氏問道：「甚麼調查？在那裏發表的？」他重申他在電視上的譴責，說他眼見的這類勞工團體調查完全缺乏專業水準。

南華早報在祈氏的駁斥下加註腳：「正如本報所指出，我們覺得在十萬人失業以及四萬三千人『半失業』以外，際此經濟衰退期間及相對來說通貨膨脹甚高而實際工資很可能下降的一年，竟然尙有廿五萬人自願工作少於每星期六日，每日不足六小時，這點實在令人難以接受……」

祈氏表示，該註脚的用意是爲了表明250,000 +43,000=293,000 人是每星期工作少於卅五小時的。統計處的報告則顯示失業人數是107,000 ，而每週工作少於卅五小時者有223,000 人，其中42,000人被列爲半失業，這實際上餘下182,000 人自願每週工作少於卅五小時。

他反問，如果南華早報不接納該數字，那甚麼數字該報才接納？即使在一九七九年三月失業數字最低的時候，香港仍有5.6 %的勞動人口是每星期工作少於卅五小時的。當時失業率爲2.3 %，半失業率仍然爲0.5 %。那時候對勞工的需求相當殷切。

祈理富表示，自願工作少於卅五小時的人士包括家庭主婦、領取退休金的人士、學生、以及那些正在休假或是生病者；亦包括那些全職工作每週少於卅五小時的人士如敎師；也可以是一些即將上任新職以及那些處身勞資糾紛的人士。

祈氏指出，大多數國家不計算半失業人數的一個原因，是由於半失業的定義不及失業的來得明確。

失業是指想工作卻沒有工作可做的人士，這點是相當明確的。半失業就不能這樣仔細劃分了。一個每週工作卅五小時及每週工作五小時的人士的情形當然大不相同，雖然兩者都可能表示希望做更多工作——所謂更多是多少呢？兩者所希望多做的工作很明顯各有不同。

因此，半失業並不是計算人們半失業的程度，而只是一個統計指標，顯示有多少人是半失業的。

祈氏表示，正因爲上述原故，所以採用了「工作小時」爲標準，高過這個標準的人士並不算半失業。我們可以問全部受僱人士他們是否喜歡做更多工作，任何人說「是」的，便可以算得上半失業。

不過如果他們每星期工作已達五十小時，而他們仍表示希望做更多工作，究竟他們還可以做多少工作呢？

祈理富表示採用「工作小時」的標準便可以緩和這個問題，不過也只是局部；因此有關半失業的統計仍然僅限於作爲指標而已。何況半失業還有其他種類，例如由於生產力低及人力資源錯誤分配而導致的半失業。

當然這並不能解釋何以在現時的按季作出失業報告的制度下，我們須等到七月中才可以知道農曆新年期間若干商號延遲開工所引起的失業數字。

祈理富答稱他希望可以提前有一個臨時數字。他表示他正試驗一種不同的計算方法，可以計算出前三個月的每月失業率臨時平均數字，以便及早發表。□

專業化的統計調查

統計處處長祈理富先生表示，他所知道由香港勞工團體如基督教工業委員會所做的失業調查欠缺專業水準，結果是沒有價值，而且極可能會引起誤解。

不過社會人士對於統計處本身的失業統計又應該給予多少信任呢？統計處的專業程度又如何呢？

統計處的社會統計部負責進行持續性的每月綜合住戶統計，爲每季的失業統計提供資料。

本刊訪問了負責社會統計部的署理助理處長葉克剛先生、高級統計師黃洪森先生、直接負責綜合住戶調查的統計師沈蔡翠女士以及高級統計主任阮旭昇先生。

葉先生從容地接受訪問，發言也最多。他首先形容統計師爲「周身刀，只一張利」。他的意思當然是指統計師的教育背景可能有異，不過他們的共同專長都是在於統計方面。

他說有些同事在大學曾攻讀工程學、經濟學、數學、社會學及各門科學。他知道有一位就曾攻讀地理的。不過他們全部都曾接受統計學的訓練。

葉先生解釋說香港有一個統計師學會的分會，爲會員舉行考試。統計處的統計員通常都是該會會員。

他指出香港亦有本身的統計學學會。他出示一份長達十頁的刋物，由華盛頓的美國統計學協會編寫，題爲：「甚麼是統計？」

葉先生的上司祈理富去年是香港統計學學會的會長，這份美國刋物在本港印行時，便是由祈氏撰寫序言的。

該序言寫道：「統計在香港正日趨普遍。若想統計結果可靠，必須在策劃、進行及分析結果方面予以小心處理，再配合充份的專業知識與經驗。」

該份刋物本身的緒言指出：「一般人皆習慣從每日報章、廣告、以及政治分析家、社會評論家及經濟預測者在多個場合提及的統計報告中尋求統計結果。

「有關上述統計的可靠性或進行統計時所涉及的工作卻沒有太多討論。資料之充裕可能很易令引用資料者以爲進行統計是一回容易的事，因而忽略了一項正式統計所涉及的多個步驟。

「如果他們明白到有技術性的問題，則往往傾於假定這些問題應該留待統計專家本身去解決。」

該篇緒言跟著詳細討論正式統計的特質、仔細解釋如何進行統計，以及概述如何運用統計的結果。

葉先生與同事十分謙虛，並不以統計專家自居。

首先他給統計學所下的定義爲一種經濟及可行的方法計算資料（從統計調查中取得），從而引伸出模式或趨勢等方面的資料。他表示統計師的職責是收集、分析及闡明資料。

他解釋說，超過一千人在統計處工作。當然，這一千人中並非全部都是合格統計師。統計處的職員分爲實地工作人員及寫字樓工作人員。負責綜合住戶統計的實地工作人員有七十一位，寫字樓工作人員有三十一位。

該七十一位實地工作人員中又分爲六十一位調查訪問員及十位主管。寫字樓工作人人員則包括編輯與查對員，還有參與每季統計分析及預備報告的次專業人員及專業人士。

葉先生跟著繪下圖表，解釋綜合住戶統計將參與經濟活動及非參與經濟活動的人口分隔開，然後統計師在參與經濟活動的人口當中，分別計算出就業及失業的人口。他表示失業率是全部參與經濟活動人口中的一個比率。（見圖一）。

他又畫下另一圖表，解釋統計員怎樣從十五歲及以上的就業人口中，找出半失業的人數。他說統計員將每週工作超過卅五小時的人士跟那些工作少於卅五小時的人士分隔開。

統計員然後將那些每週工作少於卅五小時卻尋求更多工作的人士列爲半失業者，再加上那些想有更多工作卻以爲沒有工作可做而不去找尋者。（見圖二）。

跟著，葉先生出示了一份厚達三十三頁、用長打字紙釘裝而成的册子，上面寫著「外勤統計助理主任指南」。這份指南連同十一個附錄，便是綜合住戶統計的六十一名訪問員及十位主管的「天書」。

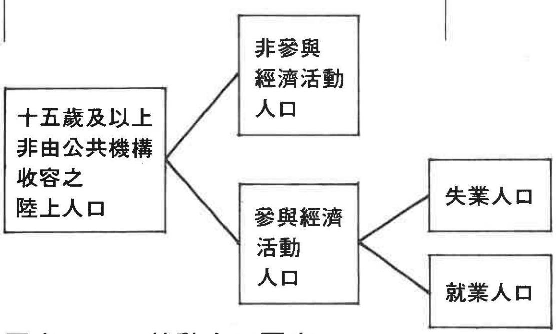
他解釋說統計處並不是每三個月派員出外調查香港全部陸地人口以找出失業率的。綜合住戶統計只是將一部份人口作最理想的抽樣調查，從調查資料當中引伸出全部人口的估計數字。

他說這一部份人口只佔全港人口的1.125 %，而其中大約只有三分一（該部份人口的0.375 %）是每月被調查，然後統計處每三個月發表報告的。不過這被調查的部份人口是經過小心挑選的，是全部人口當中極具代表性的抽樣。

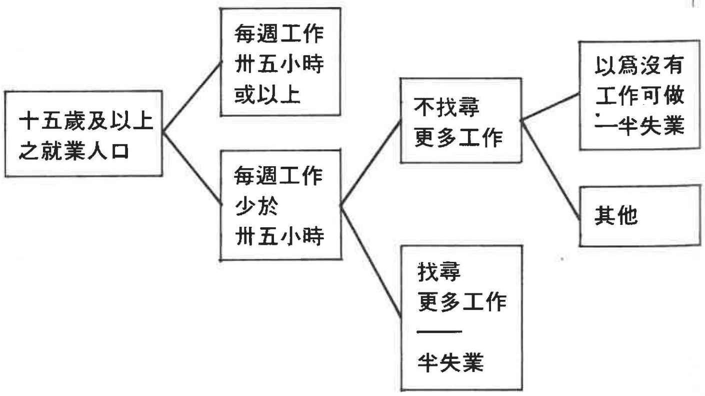
葉先生表示，統計處有一個地區測編組，負責在每十年的人口普查後保存一份最新的香港住所名單，包括永久的居住單位及臨時建築物。地區測編組爲綜合住戶統計提供每季所需的抽樣住所約14,100個（或人口的1.125 %）。

不過該項統計調查的查詢對象以有一人或以上的住戶爲單位，而不是住所。有些住所容納多於一個住戶。

葉先生表示，該指南詳細教導調查員所應遵從的鍥而不捨的方法，以調查每個住所每一住戶的全部成員。指南內解釋了所有定義與概念，用實例指導他們在發問問題時如何從旁協助接受調查人士解答，而仍然保留自己的中立身份，又解釋如何避免一些誘導性的提問。此外還解釋在務求調查準確的同時，仍須注重禮貌的重要性。



圖表一——勞動人口圖表



圖表二——開工率圖表

他說主管的職責是協助調查員取得正確與準確的反應。其實他們所得反應是十分良好的（約達98%），因爲被調派從事該項調查的，都是能力最高的固定調查員與主管，他們須到木屋區、臨時房屋區、石屋與天台建築物，以及永久居住單位進行調查訪問。

葉先生表示，問卷塡妥後，由主管加以查對，然後交予統計主任以人手點算初步資料作管制用途。資料跟著經電腦處理，在磁帶上打成密碼狀。

電腦能夠校訂錯誤，並要求職員澄淸。例如，如果電腦顯示一名練習生的薪金爲每月七千五百元，則電腦會要求職員查對一下這個可能是打密碼時的錯誤。

葉先生說這個電腦查核的過程是做三次的，以提供淸晰的資料，從而計算出最後的估計數字。

最後，葉先生出示了「綜合住戶統計勞動人口特質」的八二年度八月至十月一季的報告。該報告爲統計調查賦予廣義的結論，繼而描述就業與失業人口的特質。

統計結果跟對上一季及去年同季會作個比較。

該報告解釋，有關半失業的資料自八二年八月已開始收集。不過葉先生表示，在七九年三月及八一年三月的人口普查以前亦曾收集有關半失業的資料，當時的半失業數字爲0.3%。

在八一年的人口普查中，並沒有包括失去工作信心的員工。有關他們不找尋工作的原因在該次人口普查中並沒有問及。

最新季報的第二部份概述了統計調查所採用的方法。該季報並指出，一份有關抽樣設計及評估過程的技術性報告將於日後發表。

最後，該報告指出，調查中採用的計算勞動人口及失業人數的定義乃跟隨第八屆國際勞工統計師會議的建議。有關定義見載於報告的附錄中。

由於這些定義跟以前勞動人口調查（七五至八〇年）及一九八一年人口普查所採用的定義稍有不同，因此根據舊定義而作出的勞動人口與失業人數估計數字亦載於另一附錄，以方便比較。

對於外行人來說，當然覺得千頭萬緒，不能一下子明白過來，不過葉先生與他的同事都沒有企圖隱瞞任何事實。 □

美國移民條例複雜香港投資者須留意

多年來，香港商人赴美國公幹者甚衆。美國是本港的主要市場、最大的工業投資國、以及最大的供應國之一。大多數公司行政人員往美國公幹者都深知申請簽證的手續。不過有關在美國開設分公司及申請所需簽證的手續卻並非每個人都知道。當然閣下可以到花園道的美國領事館詢問，不過如果尙不淸楚的話，聽取一家專業公司的意見也許有用。以下一篇文章正是由一家專業公司的高級行政人員爲本刊所撰寫，該公司位於加利福尼亞的薩克拉門托。看過本文後，任何會員若希望與該公司聯絡，可向本會出版部查詢。

有意在美國開設分行辦事處的香港公司應首先熟知有關這方面的美國移民條例。在美國設立分行自然會牽涉到若干主要人材的調職，而此舉可能跟美國的移民條例構成各種問題。

美國的移民法則有若干特別條款，專爲這些所謂「公司內部調職僱員」而設。這類簽證是一種非移民簽證，有效期受到限制。通常這些簽證的有效期最長爲三年，不過如果申請人可證明公司業務必須他們逗留較長時期，則他們可以申請三年以外的續期。雖然法例的措詞看似明確簡單，其實卻十分複雜，而且經常爲法庭及行政決策所改變。「公司內部調職者」的一項基本資格，是被派往美國分公司的人士必須在母公司受僱至少一年，須是經理級或行政級人員，或者其職位須應用專門知識。

很明顯，一名普通的生產線職員並不符合「公司內部調職者」的資格，不過曾有多宗行政及法庭事例，是有關某位人士是否可以被列爲經理或行政人員，以求符合美國移民條例下的「公司內部調職者」的資格。不過，要審定具備甚麼「專業知識」才符合「公司內部調職者」的資格則更爲繁複，因爲一個大部門的主管無疑可被列爲經理級，不過要確切界定「專門知識」的範疇則殊不容易。舉例說，一般的界定是認爲秘書的工作通常不被視爲符合「公司內部調職者」的資格。不過，在另一方面，如果可以顯示某位秘書的工作的確需要專門知識，同時可以利用文件證明，則該名職員便符合「公司內部調職者」的資格。必須强調的一點是，美國移民法例並不是一成不變的。每宗事例都有個別不同情況，不能一概而定，同時美國移民部及美國領事館人員在處理這些事例時，都有相當大的判斷決定的自由。兩宗類似事例有兩個不同的決定結果，並非鮮見的事，就是因爲兩件事由不同的移民部或領事館人員處理。由於這些人員有如此大的決定權力，因此「公司內部調職僱員」的申請資料必須準備妥當，並包括所有必須的文件，這點是特別重要的。

過往曾有一個疑問，就是一家公司的東主或合夥人是否符合「公司內部調職僱員」的資格。不過，問題終於得到解決，現時已明確界定，一家公司的行政人員如果同時是該公司的東主，他是符合「公司內部調職僱員」資格的。這項條例甚至包括獨資經營的情況。還有值得留意的是，該名「公司內部調職僱員」並不須要在美國從事全職工作。他可以將時間分配在美國的分公司及香港總公司之間。如果一名行政人員根據這類簽證被調往美國的分公司，他的妻子與所有廿一歲以下未婚子女皆可同赴美國。

另一點是這類簽證並不僅限於擁有數百名或數千名以上職員的大公司，較小型公司也可以申請這類簽證。同時公司經營的業務不一定須要是國際性的。很多人往往問及須要在分公司投資多少錢才可以有資格申請公司內部僱員調職。金額並不是有關因素，更重要的是該家分公司將實際從事商業活動。

如果該家分公司尙未開業，總公司的行政人員仍可申請簽證，以便到美國設立分公司。不過，該公司必須採取若干初步步驟，證明有意在美國設立分公司。這些初步步驟不能一概而論，不過通常包括租用辦公室地方及入遞成立公司的文件。

申請「公司內部調職僱員」簽證，首先須向美國的移民服務部遞交申請書。這是最重要的過程。連同申請書尙須呈上多份文件。如果申請書資料不全或文件不足，便會受到拒絕。一俟申請書經美國的移民部批准，有關紀錄便會送交香港的美國領事館作最後決定。必須再次强調的是，雖然最終決定是由美國領事作出，不過只有在有關申請經美國的移民服務部批准，駐港美國領事才可行使最終決定權。

前曾提及「公司內部調職僱員」簽證屬非移民性質，通常可續期至三年。不過，很多時這類僱員在稍後時間可以將臨時簽證轉爲永久性簽證。至於某位申請人是否符合永久簽證的資格，則視乎個別情形而定。 □

外圍勞工有助意大利玩具業

本文作者對意大利玩具業有深厚認識，此乃全文之下節。
前文見載於八三年一月號。

至於意大利輸入的玩具數量，八一年比八〇年增加了三成。其中約一半來自亞洲國家，主要是香港與台灣，產值於八一年約達二千億里拉。

意大利是世界上製造玩具的大國（繼美國、日本與西德三個工業國後排名第四），因此意國出口的玩具遠比進口的為多，於一九七一至八〇年間其玩具出口累積盈餘為9,015 億4,800 萬里拉。

意大利有六百至七百家玩具工廠，主要由個別人士或家族集團所擁有。這方面的外國投資是微不足道的。大部份的玩具工廠屬中小型，十家大廠出產的玩具約佔意國玩具的五份一。近年間，意國工業界曾有多宗合併事件，最成功的一宗導致米蘭"Giochitalia S. r. l."的成立。

意國的玩具工廠分佈於五個地區：倫巴地（主要城市：米蘭）、威尼沙（主要城市：威尼斯）、艾美莉亞（主要城市：波倫亞）、德斯嶄尼（主要城市：佛羅倫斯）及馬雪斯（主要城市：安高拿）。

玩具業僱用人數約三萬，另僱用大量的外圍勞工，主要是家庭式作業。外圍勞工對意國玩具工業特別重要，因為玩具業也有淡旺季節，旺季的時候便需要更多人手。

在意大利，很多時家庭式作業、黑市勞工、兼職及地下工業往往指同一樣東西。這個意大利經濟體系新的一面首次吸引到國際間的注意，始自七九年二月五日的「巴黎先鋒報」刊出了意大利經濟學家沙巴接受該報記者的訪問。

想知道意大利地下工業的規模，我們從一個數字便可見一斑：七八年地下工業產量估計值66兆3,728 億里拉，而該年的國民生產總值為222 兆2,540 億里拉。

當然，數字無論是估計所得或經科學化計算出來，都應該小心加以處理識別。統計數字，即使很適當地予以操縱運用，也只不過是工具而已，因此有關統計數字的評論不應取代認眞探究經濟現象的深入因由。

不過筆者在意大利訪問過的所有人士當中，他們都證實意大利有一個廣泛的黑市勞工市場，這是地下工業所不可或缺的一部份。一名意大利銀行家說道：「意大利每一個人都有兼職，所兼做的工作由簿記、修理汽車、以至家居瑣事都有。」不用說，這裏所指的每一個人，意思是為數甚多。筆者就曾見過很多人在正職不用上班的日子便長期受僱於兼職的公司。

筆者的一位朋友是那不勒斯人，他曾說過：「在意大利生活眞不錯。我們有社會保障，退休後可以利用一整筆退職金購買一層小型住宅單位或一座小房子，日後則有養老金可度日。我的父親是一名退了休的農夫，他每逢到支取養老金的日子便高興萬分。此外，由於他住在郊外，他總可以找到一些不固定的工作來賺取外快。」當然這些不固定的工作是未經申報的，因為申報了便會減少養老金的金額。

這個遍及意大利全國的現象，要點就是「不加申報」。一份工作未經申報，該僱員便不須繳付入息稅及供款予社會保障計劃。這名未經申報的僱員，無論是家庭主婦、養老金領取者、學生或有一份經申報的工作的人士，皆已受到社會保障制度的保障。此外，未經申報僱員的工作時間較有彈性。

未經申報的勞工市場亦給予僱主較大的伸縮性。簡略地說，僱主可以不受制於社會法例的規範與壓力，而這些都是意大利工會所虎視眈眈的。意大利的工會勢力相當強大，最大的工會有三個，不過無論是工會或意國政府對地下工業都採取「隻眼開、隻眼閉」的態度，一再證明了地下工業的規模是何等龐大。

要是意大利玩具工業界利用外圍勞工，便可以應付由季節性波動所引起的困難，該工業仍須面對另一難題，部份也是由於玩具業的季節性特質所致。一方面玩具製造商在翌年一月始獲支付上年度的款項，而另一方面，他們須存有大量的存貨以應付旺季所需。一名玩具零售商曾向筆者抱怨說：「在意大利，玩具批發商並沒有多種物品的存貨，他們賣完了一類貨品始入第二種貨。」

玩具零售商還被指摘為不願意經銷未有宣傳的玩具。事實上，製造商與進口商不惜工本，花錢大賣廣告，依賴報章、玩具期刊、兒童刊物、電視片集、比賽及所有種種其他可能的方法以宣傳他們製造或進口的玩具。

在八二年四月廿一日至五月二日舉行第五十九屆國際車展的同時，意大利玩具製造商布烈斯第亦舉行一個布烈斯第模型車展，展出布烈斯第在一九六〇年製造以至最新一代的各種模型車。

美國玩具大廠「美泰」(Mattel)電子公司，有八十億里拉的財政預算，作為在意大利市場上宣傳單一種電視遊戲機——"Intellivision"。這種電視遊戲機連卡式盒帶是該廠在香港的一家附屬公司所製。

「力高」玩具廠為推廣其產品在意大利的銷路，特別舉辦了一項比賽，為期由八一年四月至十一月，共有五萬名兒童參加，頭獎是雙人免費遊覽比倫／哥本哈根。

在一份以玩具零售商為讀者對象的期刊內，「力高」刊登了一份廣告宣傳其推廣計劃，以期贏得更多玩具零售商的垂靑。該篇廣告顯示「力高」四個月的宣傳計劃，包括在當地及全國電視台所作的宣傳。

外國玩具製造商在意大利市場上亦十分積極進取。舉例說，"Mattel"，"Fisher－Price"便曾參加八二年度的米蘭樣本展覽。對於香港玩具製造商來說，米蘭玩具展也許較為熟悉。八二年度米蘭玩具展共有九百三十三位參加者接受登記，其中二百零八位來自外國廿六個國家；至於第三十三屆紐倫堡國際玩具展共有一千七百五十三名參加者，其中七百三十六位來自外國三十九個國家。

有關今年米蘭玩具展的報導，反映今年的市場情況沒有往年那麼悲觀。該玩具展確定了玩具的懷舊趨勢，傳統的玩具如洋娃娃、木製及貴金屬製的教育玩具等又再復興。利用複雜科技配合傳統玩具的年代被認為即將結束。彈球戲式的電子遊戲亦正面臨同一命運。另一方面，有電腦程序編製的電子遊戲機將是最暢銷的玩具，現時意大利的情形正是如此。至於電視遊戲"Intellivision"的需求甚大。根據筆者所獲得的資料，這種玩意由八二年九月開始，價格將提高超過14%。

米蘭玩具展秘書曾作出以下估計：平均每個意大利家庭每年花在購買玩具的費用達四萬三千里拉。很多人認為這個數字太低。法國出版的一份研究報告顯示，在歐洲國家，玩具佔一個家庭總開支的0.4 %至0.5 %，這些比率一直都維持不變，雖則十四歲以下的人口自七十年代後期已減少。

意大利的官方統計數字亦進一步確定了上述趨勢。意國最近的人口統計在七一年進行。當時意國的人口為5,413 萬6,547 人，其中1,322 萬7,663 人為

十五歲以下者。意國的人口以八〇年一月一日計算，是5,699 萬9,047 人，其中1,269 萬8,545 人爲十五歲以下者。

即使在經濟衰退時期及兒童人口遞減的時代裏，花在玩具開支方面的比率仍保持不變，個中原因之一，是現今的玩具種類繁多，式式俱備。此外，遊戲市場擴展得十分迅速。例如，一種港製會講話手錶（售話爲港幣四十元）被很多意國小童視爲一種新奇的電子玩具，而「扭計骰」與馬菲力的「金字塔」亦深受年青人甚至成年人的歡迎。順帶一提的是，馬菲力是一位在香港居住的瑞士數學家。

意大利玩具零售商對於擴大玩具市場，似乎相當重視，就正如他們重視其他市場趨勢一般，雖則不少人一直都在投訴意大利銷售系統的落後。

意大利政府並無意鼓勵超級市場的設立，而是著意改善現有的銷售制度，方法是協助擴充細小公司的規模，以及讓零售商面對更大競爭。

最近，意大利政府決定在三年內不發商業牌照予面積少於二百平方米的店鋪，店鋪所在市鎮的人口若少於三萬亦將不獲發牌。意國政府並決定於一九八二至一九九一年期間內，每年多撥出五千億里拉資助小型店鋪的擴充及遷徙。同時，意國政府又宣佈，由八二年八月五日開始，店鋪的開啓時間可以長達十小時，由上午七時至下午八時的一段時間內任擇。

近年意大利銷售制度亦有若干改進。有些意大利玩具批發商，甚至玩具零售商組成協會，爲會員輸入玩具。這類協會在其他國家也有設立。例如，西德便約有三千五百家買貨協會及合作社。

同業之間互相合作在香港並不多聞。相反來說，本地製造商與出口商之間存在著一種愛與恨的關係，特別以小型商號爲然。因此，進口商往往可以從製造商與出口商的競爭中取利，結果製造商與出口商的利潤皆下降。

其實小型製造商須明白，如果他們要維持一個有足夠專門知識的出口部門，往往是不符合經濟原則的。

另一方面，出口商亦須了解他們的職責不再限於發號施令、以英文函件往來、以及準備全套的文件。他們須改進及提高他們的專門知識，爲小型製造商提供足夠及最新的市場資料，甚至幫助他們物色原料與機器的供應商。

廣義的市場調查，對於施行適當的價格政策特別有用。

九年前，一位在香港與新加坡皆設有工廠的成衣製造商首次往訪巴黎。他對進口商說：「我在巴黎看見我廠製造的西褲在百貨公司賣七十二法郎一條。即使我把價格再提高五成，你仍可賺很多啊！」如果他真的這樣想，那他一定是不明白對價格大有影響的因素，這些因素是香港商家所不熟識的。

增值稅及供款予社會保障制度是我們提出的兩個例子。意大利的稅率，正如很多其他國家一樣，比香港爲重。

所得稅的稅率採累進制，由三百萬里拉以下應課稅淨收入抽取10%的最低稅率，以至五億五千萬里拉以上應課稅淨收入最高抽取72%的稅率。至於意大利僱員所得的額外生活程度津貼，由一九八二年八月起，每年收入達一千二百萬里拉的人士可獲二萬一百四十三里拉的津貼，而每年收入達二千萬里拉的人士，只得一萬八千七百二十五里拉的津貼而已。

公司稅的稅率如下：1974－1975年35%；1976－1981年25%；1982年30%。

不過，有三種合作形式可以分別減稅25%、50%及完全免稅。

另一種直接稅是香港所無的。這是由當地政府自資本、農地、樓宇、公司盈利、投機所得收入之中所徵收的稅項。自一九七七年一月一日以來該項稅率一直都是15%，八二年則是16.2%，即增加了８%。一如所得稅及公司稅一樣，這種直接稅亦有若干稅項寬免。

還有一種稅是徵自不動產（土地與樓宇）的資本利益稅。以一九八二年而言，資本利益達20%、50%、100 %、150 %、200 %以及超過200 %者，最高可抽稅率分別爲５%、10%、15%、20%、25%及30%。

此外還有遺產稅、關稅、印花稅及超過三十種的登記費。

外國投資者當然最好向專家請敎，以便對於意大利的稅制有全面的認識，並且獲得最新資料。從八二年五月出版的一本稅務手册之中，顯示自八一年一月五日至八二年四月十七日之間，意大利政府所施行的財政法例與條款共有六十五項之多。

不必說也可知意大利法例中，有若干對付逃稅的措施與方法。

在八二年七月廿三日，官方憲報內刊登了一條總統法令。根據此項法令，如果涉嫌逃稅者（主要是一億里拉以上的逃稅者），財政部高級官員及防止逃稅高級主任可直接翻查逃稅者的銀行與郵務的來往戶口、儲蓄戶口及人壽保險單。銀行、郵政局及保險公司若有違法者，可被判罰款五十萬至五百萬里拉。

此外，意國並設有很多防止逃稅工具。不過，意大利的逃稅問題甚爲嚴重，而財政法例與對付逃稅工具之多，令問題形成一個惡性循環。也許意大利政府認爲有必要先發制人，堵塞每一種可以讓納稅人逃稅的方法，部份原因是基於一種心理上的病態。

某次一位意大利青年男子對我說：「意大利人有九成九並不認識他們的部長。」這一點毫不爲奇，因爲那時（八二年七月）意大利當政的政府已是戰後第四十一任，最短的一次政府任期僅有九日。不過他又補充說：「最誠實的意大利人是巴特尼（意大利總統）。他令到那些部長不寒而慄。」（是由於他大公無私嗎？）雖然這位年青人這樣說，他給我的印象卻並不是巴特尼先生的信徒。

自我抵達羅馬後不久，一位意大利商人便叫我小心錢包。

我的錢包並無失竊，不過我的雙腿卻遭殃了。八二年七月廿四日，我在斑馬綫上給汽車撞倒。數秒鐘後，司機被一羣意大利人圍繞，頻呼他爲「罪魁禍首」。在場每一個人包括那名司機都想送我到醫院。由於我不想往醫院，那位長髮年青司機向我遞過一杯茶，並且留下他的姓名、電話與地址，使我大爲吃驚。由於這次事件，使我發現到意大利共和國還有其他誠實市民的。

這些軼事都可反映出「意大利心理病」的某一方面。意大利現時是唯一一個充滿自卑感的已發展國家。

意大利也許是西方已發展國家之中，唯一在公營企業方面佔有十分大比重者，甚至私人企業也得承認公營企業在意大利經濟體系所佔的重要地位。意大利一個有力的僱主聯會曾於八一年十月建議政府推行一個新工業政策，建議中表示現存的混合市場制度，是確保意大利經濟與社會發展的最佳制度。

在意大利，國家以取得私營企業股份的形式干預私營企業，這種做法始自第一次大戰與第二次大戰中間的經濟大衰退時期。當時政府設立了一個名爲ＩＲＩ的機構，以挽救三家陷入財政問題的銀行。該機構接收了銀行在工業企業的股份，操控了那三家銀行。此後，ＩＲＩ更插手其他行業的操控或接管事宜。

想知道意大利公營企業或國家佔有股份的企業情況，可查看政府八一年的年報。

不過，意大利的公營企業似乎已有走下坡之趨勢。最近意大利曾進行抽樣調查，此中包括1,176 家私營及公營企業。一九八一年這些企業合共虧損了６兆4,980 億里拉，其中４兆7,520 億里拉據報是來自公營企業的虧損。

政黨受到抨擊，說他們讓黨員管理公營企業，使企業變得官僚化，毫無創新可言。

前述的僱主聯會建議書中，亦曾指出意大利工業大受對外成本增加的問題

所打擊。政府機構、公共交通、郵政與電訊被指爲導致對外成本增加的主要原因。

也許正是這個原因，解釋何以意大利進口商在急切需要貨物的時候，往往指明貨物或樣本應從香港先付運至蘇黎世機場。事實上，蘇黎世有運輸商專門用貨車裝運貨物往意大利。

筆者一位在羅馬讀書的朋友在四個月後才接獲由香港以平郵寄出的包裹。我個人經驗是由意大利寄來香港的空郵，約需十日時間。

至於意大利的政府，筆者並無個人經驗可言，不過一名意大利經濟學家曾告訴我：「意大利公務員每星期工作六天，每天六小時……」（由上午八時至下午二時）。他還帶笑的說：「星期六是形式上的辦公。」

我到意大利之行所得到的印象是，一般來說意大利人在談到政府機構的時候都不大尊敬。

一名羅馬商家曾對我說，意大利政客往往答應爲投票人安排政府或公營企業職位。

意大利的國營統計學會顯示，在一九八〇年，有379 萬6,060 人是政府僱員。

政府機構及一般的服務性行業鮮有過份擴充而不自食其果者。畢竟生產性與非生產性業務之間是有區分的。經濟方面不能扭轉的趨勢，如果有的話，遲早也會告一段落。這不就是我們眼見的大規模生產的下場嗎？ □

簡報滙編

歡迎新會員

本刊歡迎四十八間公司於一九八三年一月份加入本會，成爲香港總商會會員。（新會員名單詳列今期英文版）。

紐西蘭貿易表現高於澳洲

本刊二月號一篇題爲「澳洲現已成爲香港之增長最快供應國」的文章有以下報導：「香港總商會提供的數字甚至顯示截至一九八二年十月止的十個月內，澳洲對香港的出口跟八一年同期相比，是增長最多的國家（14%）。」

紐西蘭駐港專員公署向本刊表示，紐西蘭同期的出口表現上升了20%（澳洲爲14%），而香港與紐西蘭之間的貿易總增長率比澳洲超出13%。

尤德爵士在本會週年晚宴席上重申香港的力量

港督尤德爵士於本會週年晚宴席上致詞時表示，舊的力量仍然存在，並加添了新的力量。

港督尤德爵士於一月廿一日出席本會週年晚宴致詞時，向與會者表示：「我們不應低估自己的力量，這力量在過去曾帶領我們渡過難關。」

尤德爵士指出，很少經濟能像我們的那麼有伸縮性，或可以用同樣速度去適應。在近幾年來，香港的管理和專業資源已經大爲充實，而人力訓練亦已改善。香港的經濟已經多元化，而它可以提供的各項財政設施亦已增加。

這些力量，加上以前曾使香港渡過艱難日子的自然條件和其他有利因素——我們的企業家的企業，願意勤力工作的勞動工人，有利於私人生意發展的政府政策和良好社會，以及作爲國際通訊中心的地位。

尤德爵士表示，有些企業是有眞正的困難，但有更多其他的企業在面臨逆境中仍然有實力，謹愼管理和有創造力。舊的力量仍然存在，並加添了在過去十年培養的新力量。

港督對許多本地及海外的公司、銀行及機構表示敬意。它們不單以言語，更以新的及直接的投資，以伸展它們所提供的財務設施，及以擴展其經營來證明其信心及承担。

他表示在過去六個月，有四間主要國際性公司宣佈在本港投資的計劃。兩間主要銀行宣佈重要的重建計劃。四間外地銀行成功地在本港申請到新銀行牌照。十六間全部由海外擁有或部份爲海外擁有的工廠已知在香港設立並開始經營。在同一期間，有一百一十五間外地公司在本港設立分公司辦事處。

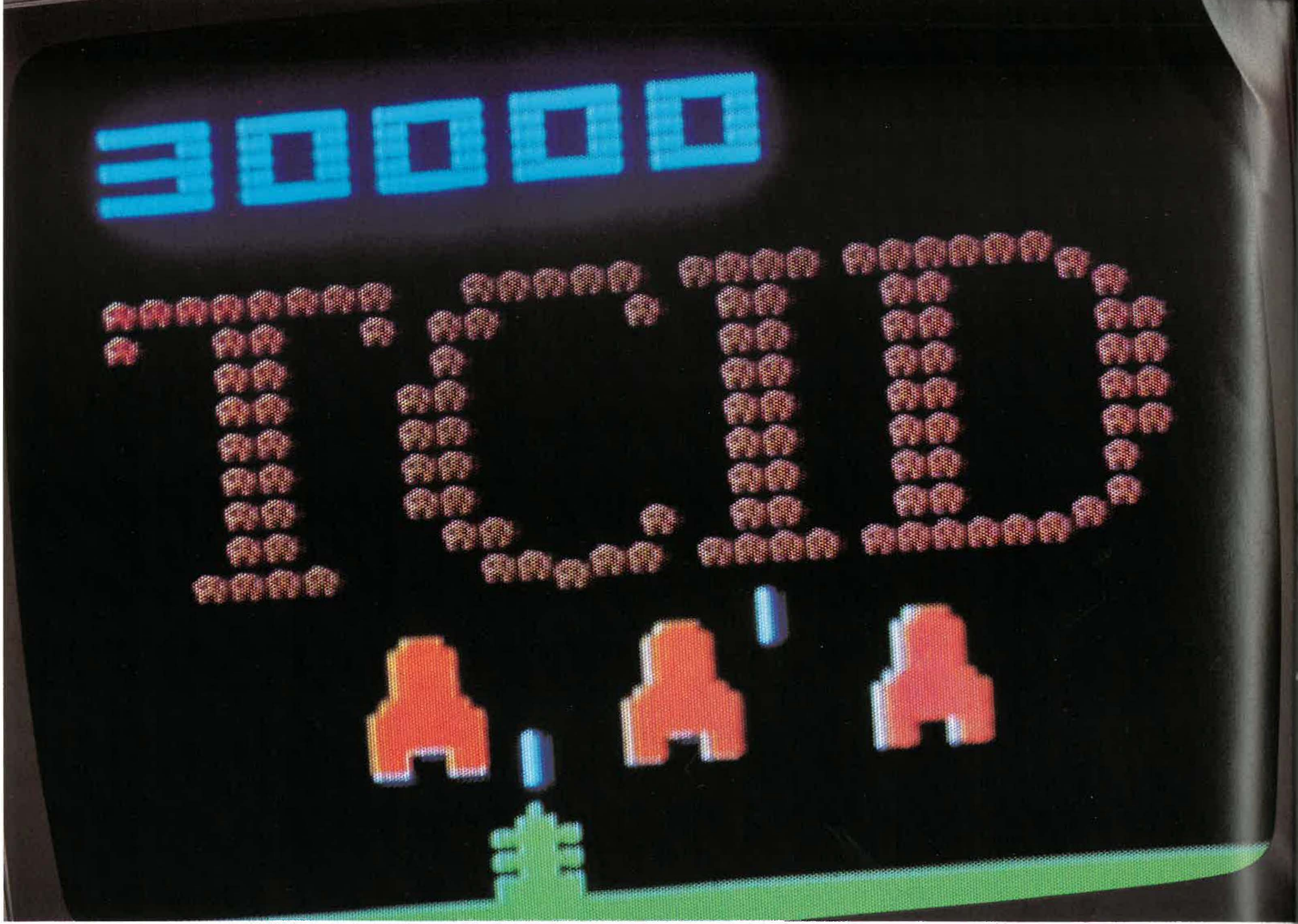
引用尤德爵士的說話：「因此，我們不妨謹記：假如天氣惡劣，船是堅固的。」

本會主席馬登表示，一九八二年對香港而言是重要的一年。半世紀以來，世界各地所經歷爲期最長及影響最深遠的經濟衰退，終於在八二年將香港捲入漩渦。工商業處於很大壓力之下，支持工商業的本港內部發展與制度亦受到打擊，而本港若干社會目標卻看似遙不可及。

在這些可預知的發展之上，有關本港長遠前途談判的展開，引起十分大的關注與揣測。其影響是重大的，而對於那些須每日評估風險因素以從事商業的人士來說，對問題感到關注及諸多揣測，實屬毫不爲奇。

本會主席馬登致詞時謂：「前景不明朗是社會穩定的大敵，而社會穩定卻是香港繁榮的基本原理。」

馬登先生表示，前景不明朗是維持穩定的大敵，而穩定卻是香港繁榮的基本原理。馬登跟著表示總商會將繼續向政府効忠，並認爲現時進行的談判將使香港仍然保持目前的經濟制度，而總商會會員將可有機會進一步爲本港的發展作出貢獻。 □


30000
TCID