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The Road to Sustainable Development of Hong Kong SMEs - The Present and Future

Survey Report on Services Sector



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The Road to Sustainable Development of Hong Kong SMEs—Present and Future

Hong Kong SMEs in the Services Sector

1. Introduction

SMEs play a very significant role in any economy, not least in the Hong Kong economy. In 2009, more than 98% of enterprises in Hong Kong are SMEs. They may be small individually but together they employ 48% of the total working population and their combined business revenue was nearly 57% of that of all private enterprises in Hong Kong.

One of the main strengths of SMEs is their adaptability but at the same time they are also more vulnerable to upheavals in the economic environment, which have not been lacking in the past two decades - the Asian financial crisis of 1997, SARS outbreak and economic downturn of 2003, the global financial melt-down of 2008. How are SMEs coping in the turbulent economic environment, what are their views of the future and what can be done to provide the necessary support for them to adapt in the face of new opportunities and threats? These are some of the main objectives of the current survey which forms part of a study conducted from May 2010 to May 2011 by The Hong Kong Chinese Importers' and Exporters' Association (HKCIEA) in collaboration with the Institute for Enterprise Development, School of Business, Hong Kong Baptist University. The study is sponsored by the SME Development Fund of the Trade and Industry Department, HKSAR Government.

The survey targeted SMEs in four selected sectors, namely, **Import and Export Trade Sector, Manufacturing Sector, Import and Export Trade cum Manufacturing Sector, and Services Sector**. Questionnaires were sent to 1,812 SMEs through HKCIEA and other business associations between July and August of 2010 (See Questionnaire in Appendix 1). A total of 272 usable questionnaires were returned by the end of August 2010, making an overall response rate of 15 %. The breakdowns of the sample are presented in Table 1.

Table 1.1 Profile of SMEs in the Survey

Sector	No. of SMEs	Percentage
Import and Export Trade	81	29.8%
Import/Export Trade cum Manufacturing	69	25.4%
Manufacturing	64	23.5%
Services	48	17.6%
Others	10	3.7%
Total	272	100.0%

This report presents the findings of 48 responding SMEs surveyed in the Services sector. They were asked to identify factors influencing their current business, difficulties in doing business in Hong Kong and difficulties in doing business in mainland China, the strategies being adopted and the degree of perceived effectiveness of these strategies. They were also asked to make projections of the business environment and of their own business plan in the next three years. Finally, the surveyed SMEs were asked their views on HKSAR government and mainland policies for SMEs. The report ends with some suggested recommendations aimed at enhancing the competitiveness of SMEs.

2. Profile of the Surveyed SMEs in the Services Sector

The 48 SMEs in the Services sector are engaged in information technology, transport and logistics, financial service, medical service, accounting service, legal service, social service, education, architecture and interior design, hotel and tourism, food and catering, real estate and property management services, etc.

Table 2.1 shows that the majority of the responding SMEs in Services sector are small, as 77.1% of them employ fewer than 50 employees and 22.9% employ over 50 staff in Hong Kong.

Table 2.1 Number of Employees

Employee Size	Number of SMEs	Percentage
<10	16	33.3%
10 – 50	21	43.8%
51 – 100	4	8.3%
>100	7	14.6%
Total	48	100.0%

About 78% of the SMEs surveyed have been in operation for more than 5 years and 23% less than 5 years, see Table 2.2.

Table 2.2 Years of Establishment

Years of Establishment	Number of SMEs	Percentage
<3	8	16.7%
3 – 5	3	6.2%
6 – 10	13	27.1%
11 – 15	9	18.8%
>15	15	31.2%
Total	48	100.0%

3. Business Performance

The questionnaire survey was conducted in 2010, not long after the global financial crisis of 2008, and the SMEs were asked to compare their current business performance to that before the financial crisis. Figure 3 shows that 48.9% of the responding SMES actually saw an increase in sales over the period. However, only 33.3% of them saw an increase over the same period. The corresponding figure for return on assets was 32.6%.

Findings revealed that the 2008 financial crisis did not adversely affect the sales of the majority of these SMEs in the Services sector – 82.9% of them experienced an increase or no change in sales (corresponding figures for profit is 81.2% and for return on assets 80.4%). This shows that they were able to grow steadily in spite of the 2008 financial crisis that hit hardest on the US and European economies. One of the reasons could be that a major part of their businesses are tied to China which achieved a GDP increase over the 2008 financial crisis period.

Figure 3 Change in Business Performance Compared to Pre-financial Crisis

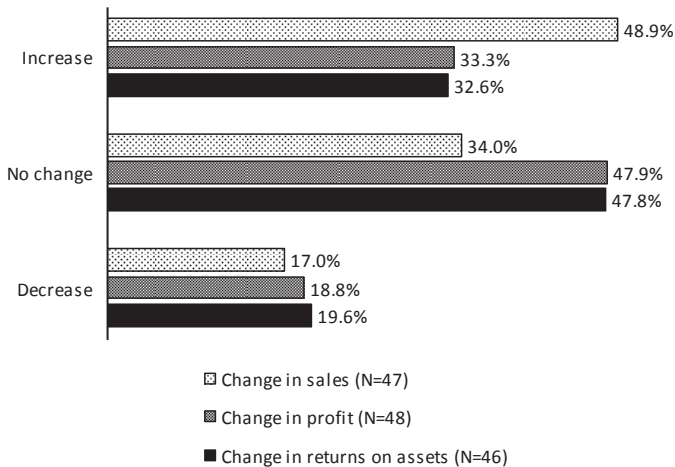


Table 3.1 shows that for those **SMEs that recorded better business performance**, the average percentage increase in sales, profit and return on assets were 34.6%, 30.4% and 30.0% respectively. Table 3.2 gives the corresponding figures for **those which recorded a decline** in sales, profit and return on assets.

Table 3.1 Increase in Sales, Profit and Returns on Assets Compared to Pre-financial Crisis

	Percentage increase in		
	Sales (N=11)	Profit (N=18)	Return on assets (N=12)
Minimum	5.0%	5.0%	5.0%
Maximum	100.0%	100.0%	100.0%
Mean	34.6%	30.4%	30.0%

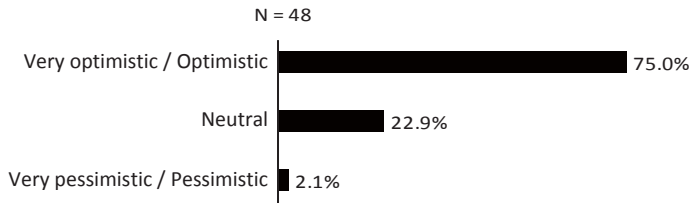
Table 3.2 Decrease in Sales, Profit and Returns on Assets Compared to Pre-financial Crisis

	Percentage decrease in		
	Sales (N=4)	Profit (N=5)	Return on assets (N=5)
Minimum	10.0%	10.0%	10.0%
Maximum	40.0%	40.0%	60.0%
Mean	22.5%	24.0%	25.0%

4. Three-year Business Projection

The sampled SMEs in the Services sector were asked to make forecasts for the next 3 years. Figure 4.1 shows that majority (75%) of the SMEs surveyed held optimistic or very optimistic outlook of their business and only 2.1% were pessimistic or very pessimistic.

Figure 4.1 Projection of Next Three Years' Business



The surveyed SMEs were also asked to project future expansions in Hong Kong, mainland China and overseas in the next three years. As shown in Figure 4.2, about 58.1% of them plan to expand business in mainland China, 45.8% in Hong Kong, and 31.7% in overseas countries. For the SMEs that plan to cut business operations, 4.7% would cut down operations in mainland China, 10.4% in Hong Kong and 2.4% overseas; while 50% of them would plan to develop new markets (Figure 4.3).

Figure 4.2 Projection of Next Three Years' Business in Hong Kong, mainland China and Overseas

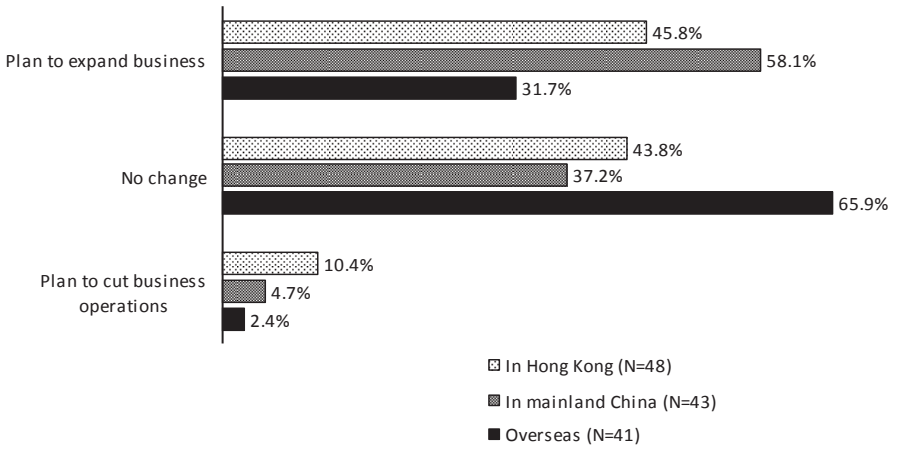
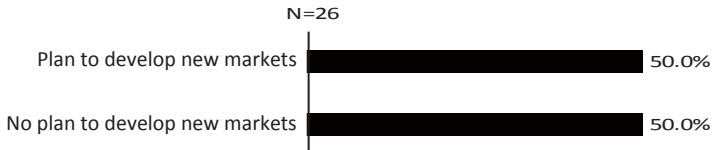


Figure 4.3 Plan to Develop New Markets in the Next Three Years



5. Factors Influencing the Current Business

The responding SMEs were presented with eight external factors deemed to have impact on business. Overwhelmingly, 'policies of the mainland government' is considered of greatest impact with 65.9% rating this factor of significance or of great significance, followed by 41.5% for the factor 'debt crisis in Europe', 41.0% for 'RMB clearing and settlement procedure' and 40.0% for 'fluctuations of exchange rates', as shown in Table 5.1.

Table 5.1 Perceived Impact of External Factors on Business

External Factor Deemed to Impact Business	SMEs rating the specific factor to be of great significance or of significance	
	Number of SMEs	Percentage
Policies of mainland government (N=41)	27	65.9%
Debt crisis in Europe (N=41)	17	41.5%
RMB clearing and settlement procedure (N=39)	16	41.0%
Fluctuations of exchange rates (N=40)	16	40.0%
Expansion of mainland domestic market (N=37)	10	27.0%
The establishment of free trade zone between China and ASEAN (N=34)	7	20.6%
CEPA Policies (N=35)	4	11.4%
Pan-Pearl River Delta development (N=30) (泛珠三角框架下的先行先試)	2	6.7%

Table 5.2 below shows external factors that were unclear to the responding SMEs. Top of the list are 36.2% who were unclear about the 'Pan-Pearl River Delta development', followed by 27.7% not clear about 'establishment of free trade zone' and 25.5% who were not clear about 'CEPA policies'. This shows the need for SMEs to be kept well informed and educated about new development in the macro economic and business environment and policies related to doing business in mainland China.

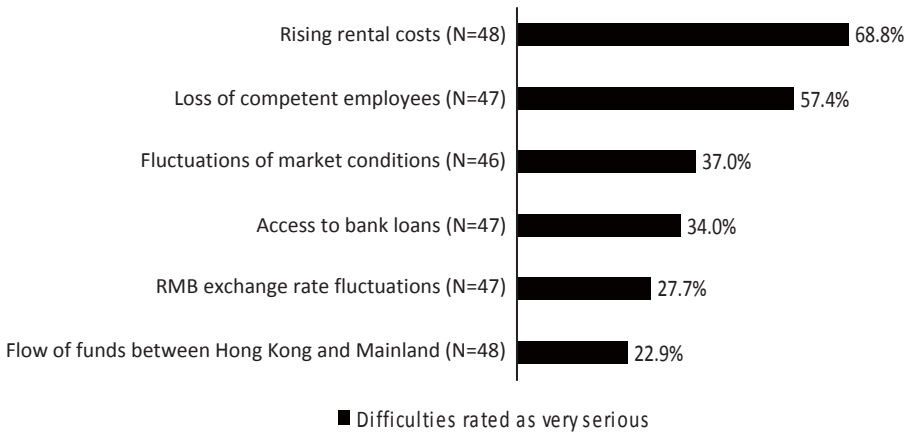
Table 5.2 External Factors which are Unclear to SMEs

External Factor unclear to SMEs	Number of SMEs	Percentage
Pan-Pearl River Delta development (N=47) (泛珠三角框架下的先行先試)	17	36.2%
Establishment of free trade zone between China and ASEAN (N=47)	13	27.7%
CEPA policies (N=47)	12	25.5%
Expansion of mainland domestic market (N=47)	10	21.3%

6. Difficulties in Doing Business in Hong Kong

Respondents were asked to assess a list of six factors that present difficulties in doing business in Hong Kong. Top of the list is ‘rising rental cost’ – 68.8% of the responding SMEs considered this an extremely serious problem, as indicated in Figure 6. Rental is a reflection of property prices. Businesses will be hard hit if the rise in property prices is not curbed. The second highest is ‘loss of competent employees’, 57.4%. This shows that SMEs in the Services sector had serious problem retaining capable staff. About one-third of them identified ‘Fluctuations of market conditions’¹ and ‘access to bank loans’ as difficulties in doing business in Hong Kong. These concerns must be addressed for the Hong Kong SMEs in the Services sector.

Figure 6 Difficulties Experienced by SMEs in Doing Business in Hong Kong



¹ Subject to external economic conditions

7. Difficulties in Doing Business in Mainland China

Similarly, respondents were asked to assess factors that present difficulties in doing business in mainland China. As shown in Figure 7, the first two on the list are 'rising wages' and 'unclear policy', 56.1% and 51.2% respectively. Many SMEs are also faced with the difficulties of the 'competency of the Chinese professionals', 'effectiveness in implementing laws and regulations' and the existence of 'a fair and equitable business environment'. This means labour cost in the mainland has been increased over the years, but the mainland policy, enforcement of laws and regulations as well as the capability and performance of the Chinese professionals are questionable. This shows that Hong Kong professionals may still have an advantage over their Chinese counterparts and the mainland business environment and practices are not yet fully developed.

Figure 7 Difficulties Experienced by SMEs Doing Business in the Mainland



8. Coping Strategies Adopted by Hong Kong SMEs in Services Sector

The study made an attempt to look at the strategies adopted by SMEs to cope with the challenges and the effectiveness of these strategies.

Overwhelmingly, SMEs in the Services sector have adopted market development strategies rather than cost-cutting strategies. These include developing new markets (81.3%), brand development (81.3%), and increase employee benefits and offer more employee training (79.2%), as shown in Table 8.1.

With regard to the effectiveness of these coping strategies, over 70% of the SMEs considered 'brand development' very effective, followed by 64.1% for new market development, 63.6% for R&D (improve production process), 60.5% for increase employee benefits and offer more employee training and 59.3% for R&D (develop new product or service). Results reveal that Hong Kong SMEs are willing to invest in building brand and in R&D as well as exploring new markets, training and developing human resources and the well being of employees in an attempt to build competitive advantage. Horizontal and vertical integration and cost reduction through localisation are also considered as effective coping strategies by these SMEs, as shown in Table 8.2.

Table 8.1 Strategies Adopted by SMEs to Cope with Challenges

Adopted Strategy (N = 48)	Number of SMEs which adopted strategy	Percentage
New markets development	39	81.3%
Brand development	39	81.3%
Increase employee benefits and offer more employee training	38	79.2%
Restructuring	28	58.3%
R&D (Develop new product or services)	27	56.3%
Horizontal Integration	26	54.2%
Cost reduction through localisation	24	50.0%
Vertical Integration	23	47.9%
R&D (Improve production process)	22	45.8%
Cost reduction through outsourcing	20	41.7%
Cost reduction through downsizing	16	33.3%
Relocation (基地轉移)	13	27.1%

Table 8.2 Effectiveness of the Strategy Adopted by SMEs

Adopted Strategy	Number of SMEs which find the strategy effective	Percentage
Brand development (N=39)	28	71.8%
New markets development (N=39)	25	64.1%
R&D (Improve production process) (N=22)	14	63.6%
Increase employee benefits and offer more employee training (N=38)	23	60.5%
R&D (Develop new product or services) (N=27)	16	59.3%
Restructuring (N=28)	15	53.6%
Cost reduction through localisation (N=24)	12	50.0%
Vertical Integration (N=23)	11	47.8%
Horizontal Integration (N=26)	11	42.3%
Cost reduction through outsourcing (N=20)	8	40.0%
Cost reduction through downsizing (N=16)	6	37.5%
Relocation (基地轉移) (N=13)	2	15.4%

9. Awareness and Effectiveness of HKSAR Government Schemes for SMEs

Table 9.1 shows that a significant percentage of responding SMEs are not aware of HKSAR government schemes designed to assist SMEs. For example, 61.7% are not aware of the ‘SME Business Installations and Equipment Loan Guarantee Scheme’ and the ‘R&D Cash Rebate Scheme’, and almost half of them, 48.9% are not aware of the ‘Special Loan Guarantee Scheme’. Table 9.2 shows that less of half of them who are aware of the schemes found them effective. More effort on communication and promotion should be made to publicise these government schemes to SMEs. Furthermore, there is room for improvement to design more effective government schemes for SMEs in Hong Kong.

Table 9.1 Lack of Awareness of HKSAR Government Schemes for SMEs

HKSAR Government Scheme for SMEs (N = 47)	Number of SMEs not aware of scheme	Percentage
SME Business Installations and Equipment Loan Guarantee Scheme	29	61.7%
R&D Cash Rebate Scheme	29	61.7%
Special Loan Guarantee Scheme	23	48.9%
SME Development Fund	21	44.7%
Manpower Training and Development	18	38.3%
SME Loan Guarantee Scheme	18	38.3%
SME Export Marketing Fund	17	36.2%

Table 9.2 Effectiveness of HKSAR Government Schemes for SMEs

HKSAR Government Scheme for SMEs (N = 47)	Number of SMEs which found the scheme effective	Percentage
SME Export Marketing Fund	21	44.7%
SME Loan Guarantee Scheme	20	42.6%
Manpower Training and Development	18	38.3%
SME Development Fund	16	34.0%
Special Loan Guarantee Scheme	15	31.9%
SME Business Installations and Equipment Loan Guarantee Scheme	10	21.3%
R&D Cash Rebate Scheme	9	19.1%

10. Government Support for the Sustainable Development of SMEs

Figure 10.1 lists, in order of priority, areas where SMEs think HKSAR government can assist them. Top of the list was 'provide tax relief' (66.7%), followed by 'expand coverage of RMB exchange scheme' (45.8%), 'provide assistance in international law' (45.8%), 'facilitate market promotion and provide useful market information' (43.8%), and 'provide avenues to access mainland markets' (41.7%).

Figure 10.1 Areas of Support by HKSAR Government to Assist SMEs' Sustainable Development

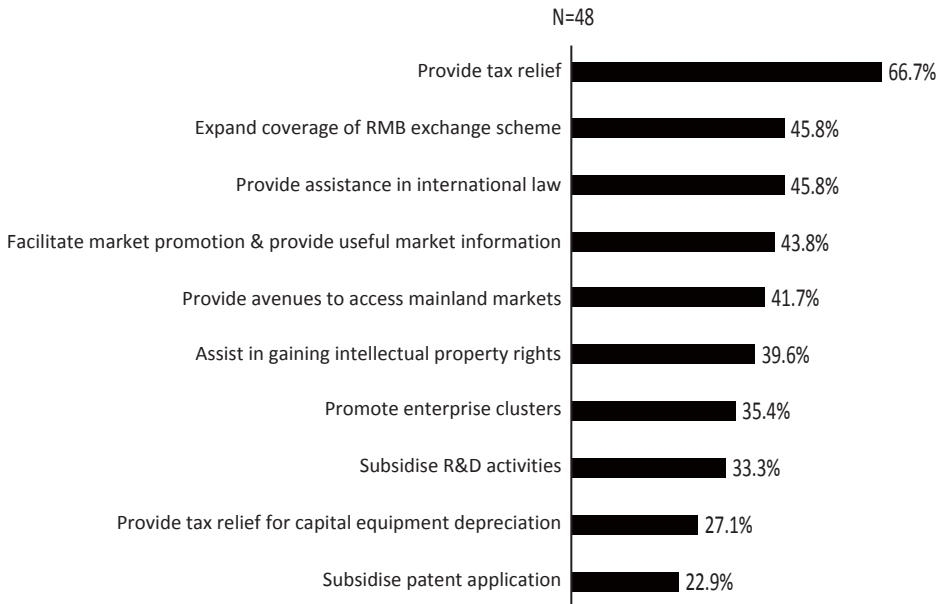
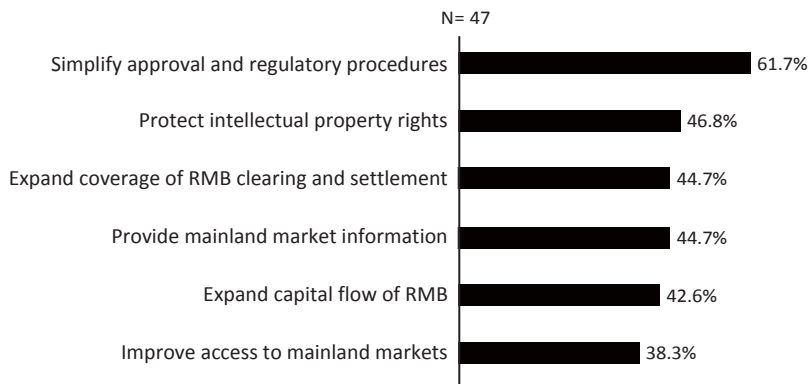


Figure 10.2 shows areas of major concerns regarding Hong Kong SMEs' development in the Mainland. Over 60% of the SMEs would appreciate assistance from mainland government in simplifying approval and regulatory procedures which is crucial to doing business in China. They are also concerned about protection of intellectual property rights, the possibility of expanding coverage of RMB clearing and settlement, and providing mainland market information. Related problems such as expanding RMB capital flow and accessibility to mainland markets will need to be addressed.

Figure 10.2 Areas of Concern to be Addressed by Mainland Government



11. Conclusion and Recommendations

Results of the survey show that 75% of the 48 SMEs in the Service sector were optimistic or very optimistic about their business prospect in the next three years and only 2.1% were pessimistic or very pessimistic with the rest being neutral. Although majority were positive about the outlook, nevertheless, they all faced many challenges, including rising rental and other costs, loss of talents, unclear government policies, access to funds, etc.

Undoubtedly, the survival and success of a particular SME is a matter of its own competitiveness. However, in view of the significant contribution of SMEs to the national economies, governments worldwide now realise the importance of creating a business environment conducive to SME's sustainable development.

A watershed event for SMEs worldwide was the signing of the Bologna Small Business Charter in 2000 by about fifty OECD members and non-members. Based on this, the European Commission came up with the European Charter for Small Enterprises which culminated in the Small Business Act of 2008². At the heart of this act is the 'Think Small First' principle which requires legislation to take SMEs' interests into account at the very early stages of policy making in order to make legislation more SME friendly.

On a practical level, governments have actively taken concrete steps to assist SMEs. For example, many countries have lower tax rates for SMEs to foster their competitiveness. UK in the 2008 Budget set an aspirational target for SMEs to win 30% of public sector business within the next 5 years. The Japanese government set up technical training centres that provide consultation as well as make available a wide range of expensive testing tools to SMEs.

The following recommendations are suggested after due consideration of the examples from other countries, findings of current survey, in-depth interviews with SME owner-managers and input from Hong Kong SMEs participants in open forums conducted during the course of this project:

(A) Government Policies to Support SMEs

1. Establish a central SME policy bureau to overlook the sustainable development of SMEs and to provide one-stop services to SMEs instead of SMEs having to go to different government departments. The bureau will take the role of representing the interest of SMEs in liaising with Mainland departments.

² http://ec.europa.eu/enterprise/policies/sme/documents/sba/index_en.htm

2. Relevant government agencies to communicate regularly with SME representatives to understand their needs and to find ways to address these needs.
3. Allocate more resources for the training of SME personnel and for the development of new markets, currently provided by the Trade and Industry Department.
4. Make information and assistance more readily accessible to SMEs. For example, Hong Kong Trade and Development Council provides an impressive range of resources and services to SMEs but there is a need to actively seek ways to promote the services and educate SMEs to take advantage of these resources and services.³
5. Actively seek strategic alliances with regions in mainland China to broaden as well as strengthen links.
6. Promote and nurture entrepreneurship through education, training, special awards, experience sharing, etc.

(B) Financing

1. Financial institutions to adjust the ‘bricks-and-mortar’ credit principle when dealing with SMEs and offer innovative credit and financial tools and schemes such as micro-credit, venture capital, business angels.
2. Government to continue to make loans available and accessible to SMEs through direct funding or through providing loan guaranteeing. These schemes should be updated periodically to ensure that they meet the needs of SMEs, for example, replacing the Market Oriented Loan Guarantee Scheme by the SME Financing Guarantee Scheme under the Hong Kong Mortgage Corporation. There is also a need to disseminate of such information more effectively to SMEs. The application process of these government fundings should be made less tedious.
3. Strengthen the communication channel between lending institutions and SMEs, for instance, through a banking-SME round-table discussion. This round-table could include third parties such as academicians, government representatives, and independent professionals such as risk management experts.

³ For example, many SMEs expressed the need for assistance in matters of intellectual property rights which unknown to them, HK TDC is in a position to advise and assist.

(C) China Market

1. Penetrate mainland China domestic market through development of own-brand products.
2. Promote sharing of experiences, best practice, successful business models, etc. among SMEs.
3. HKSAR government to follow the 'Twelve Five-Year Plan' closely and initiate necessary follow-up action that will help Hong Kong SMEs penetrate the domestic market, e.g. initiate areas of collaboration with Mainland counterparts, exchange business ideas, establish networks.

(D) Creation of a 'Hong Kong City'⁴

1. Develop Hong Kong as a centre for trade and trade fairs through the creation of a 'Hong Kong City' located near the Hong Kong – Shenzhen border. The concept is to make Hong Kong the international window to China and a China window to the world.
2. Another important dimension of the 'Hong Kong City' concept is to encourage the development of high value, high-end 'Made in Hong Kong' products. This could serve to draw some manufacturers to relocate their production to Hong Kong and the output could then enter the Mainland market through the incentives of CEPA.
3. The 'Hong Kong City' can be divided into three zones: (a) a global trade fair zone to introduce overseas products to the Mainland buyers; (b) a Mainland product trade fair zone to introduce Mainland products to overseas buyers; and (c) a Hong Kong product zone to promote Hong Kong's brand-name products.
4. Where necessary, the 'Hong Kong City' can spill over to Hong Kong e.g. making Tsuen Wan a food product wholesale centre, making Aberdeen – Wong Chuk Hang a furniture wholesale centre, making Sham Shui Po a fashion wholesale centre, making Hunghom a jewelry wholesale centre, etc.
5. The 'Hong Kong City' will make it possible to hold large trade fairs in the scale of China Import and Export Fair (Canton Fair). It will also allow for permanent displays rather than one-time displays. The scale of the 'Hong Kong City' should be large enough to allow not only the high-end products but products of all price range.

⁴ A similar concept is Yiwu (a medium sized city in Zhejiang province) being 'the first city of small commodities trade' in China. The city government strategically developed Yiwu as a trade exhibition centre for small commodities.

(E) International Markets

1. Make every effort to diversify markets, e.g. take advantage of the establishments of the Free Trade Zone between China and ASEAN, and the Economic Cooperation Framework Agreement between mainland China and Taiwan launched in 2008.
2. The Hong Kong Trade and Development Council to strengthen the dissemination of information including market information, legislation and regulations, incentives, government policies, investment opportunities and procedures, etc.
3. The Hong Kong Trade and Development Council to organise more trade related activities such as business tours, trade fairs and exhibitions, promotion of SME products and services.

(F) Brand Development

1. Promote Hong Kong as the regional headquarters for overseas brands to penetrate the mainland China market.
2. Encourage product innovation and take advantage of Hong Kong's niche in product design to develop own-brand products.
3. Identify some second or third tier European brands and enter into joint ventures with them, in order to penetrate the mainland market.

(G) Human Capital Training and Development

1. HKSAR government can follow the example of the Japanese government to make available a pool of professionals and experts to offer consultation to SMEs.
2. The government to encourage the training and development of SME entrepreneurs and managers by offering subsidies, designing and offering suitable training courses to improve management capabilities.
3. SME and professional associations to collaborate with universities and professional institutes to develop and offer customised training programmes to upgrade the knowledge and skills of various levels of SME workers.
4. Financial support and study leave to be provided by the SME owners and the HKSAR government to encourage continuous education and life-long learning to build a competent work force.

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3. The European Commission Directorate General for Enterprise and Industry, the OECD Private Sector Development Division, the European Training Foundation and the European Bank for Reconstruction and Development (2009), *SME Policy Index 2009, Progress in the Implementation of the European Charter for Small Enterprises in the Western Balkan*
4. Continuing Education Fund: <http://www.sfaa.gov.hk/cef>
5. Creative Hong Kong, HKSAR Government: <http://www.createhk.gov.hk>
6. Federation of Hong Kong Industries: <http://www.industryhk.org>
7. Innovation and Technology Commission, HKSAR Government: <http://www.itc.gov.hk>
8. Intellectual Property Department, HKSAR Government: <http://www.ipd.gov.hk>
9. Hong Kong Brand Development Council: <http://www.hkbrand.org>
10. Hong Kong Export Credit Insurance Corporation: <http://hkeccic.com>
11. Hong Kong Management Association: <http://www.hkma.org.hk>
12. Hong Kong Productivity Council: <http://www.hkpc.org>
13. Hong Kong Science and Technology Parks: <http://www.hkstp.org>
14. Hong Kong SME Blog: <http://www.hksmeblog.com>
15. Hong Kong Trade Development Council: <http://www.hktdc.com>
16. Hong Kong Wireless Technology Industry Association: <http://www.hkwtia.org>
17. School of Professional and Continuing Education, The University of Hong Kong: <http://hkuspace.hku.hk>
18. Support and Consultation Centre for SMEs (SUCCESS), Trade and Industry Department, HKSAR Government: <http://www.success.tid.gov.hk>
19. The Chinese Manufacturers' Association of Hong Kong: <http://www.cma.org.hk>
20. The Open University of Hong Kong: <http://www.ouhk.edu.hk>
21. Vocational Training Council: <http://www.hkwtia.org>

Appendix 1 Survey Questionnaire

『探索中小企發展之路 — 現狀及未來』問卷調查

誠邀閣下填寫此問卷，並於 7 月 23 日或之前傳真至 2581-4979 或電郵至 info@hkciea.org.hk。
如有查詢，請致電 2544-8474 與麥先生聯絡。

I. 公司資料

A. 貴公司的主要業務是：

進出口貿易 / 製造業 (可選兩項)

- | | | | |
|---|-------------------------------|----------------------------------|--------------------------------|
| <input type="checkbox"/> 化學及生物科技 | <input type="checkbox"/> 食品 | <input type="checkbox"/> 電子及電器產品 | <input type="checkbox"/> 工業機器 |
| <input type="checkbox"/> 珠寶首飾 | <input type="checkbox"/> 金屬製品 | <input type="checkbox"/> 塑膠 | <input type="checkbox"/> 印刷及出版 |
| <input type="checkbox"/> 紡織及製衣 | <input type="checkbox"/> 玩具 | <input type="checkbox"/> 鐘錶 | <input type="checkbox"/> 汽車 |
| <input type="checkbox"/> 其他 (請註明：_____) | | | |

服務行業

- | | | | |
|-------------------------------|--------------------------------|---|-----------------------------|
| <input type="checkbox"/> 資訊科技 | <input type="checkbox"/> 物流及運輸 | <input type="checkbox"/> 會計 | <input type="checkbox"/> 金融 |
| <input type="checkbox"/> 醫療 | <input type="checkbox"/> 法律 | <input type="checkbox"/> 其他 (請註明：_____) | |

B. 貴公司**香港**的僱員總人數：

- 少於 10 人 10-50 人 51-100 人 多於 100 人

C. 貴公司的成立年數：

- 3 年以下 3-5 年 6-10 年
 11-15 年 15 年以上

D. 貴公司**內地**子公司 / 附屬公司的僱員人數：

- 少於 300 人 301-1000 人 1001-3000 人
 多於 3000 人

E. 貴公司現時的業務表現相比金融風暴前的情況：

- | | | | |
|-------------|------------------------------------|-----------------------------|------------------------------------|
| 1. 銷售方面的改變 | <input type="checkbox"/> 增加 _____% | <input type="checkbox"/> 不變 | <input type="checkbox"/> 減少 _____% |
| 2. 經營利潤的改變 | <input type="checkbox"/> 增加 _____% | <input type="checkbox"/> 不變 | <input type="checkbox"/> 減少 _____% |
| 3. 投資回報率的改變 | <input type="checkbox"/> 增加 _____% | <input type="checkbox"/> 不變 | <input type="checkbox"/> 減少 _____% |

II. 公司的營運現況

A. 請評估以下的外來環境因素對貴公司現時經營的影響：

	不清楚	極大 程度	頗大 程度	一般	輕微 程度	極小 程度
1. CEPA 的政策	<input type="checkbox"/>	1	2	3	4	5
2. 泛珠三角框架下的先行先試	<input type="checkbox"/>	1	2	3	4	5
3. 國內提倡擴張內銷	<input type="checkbox"/>	1	2	3	4	5
4. 中國—東盟自由貿易區的成立	<input type="checkbox"/>	1	2	3	4	5
5. 人民幣貿易結算	<input type="checkbox"/>	1	2	3	4	5
6. 國內政府政策	<input type="checkbox"/>	1	2	3	4	5
7. 歐洲債務危機	<input type="checkbox"/>	1	2	3	4	5
8. 外匯市場波動	<input type="checkbox"/>	1	2	3	4	5
9. 其他 (請註明)_____	<input type="checkbox"/>	1	2	3	4	5

II. 公司的營運現況 (續)

B. 請評估貴公司在營運及發展時遇到的困難 / 阻礙：

	非常嚴重	嚴重	一般	不太嚴重	不嚴重	請按次序排列非常嚴重的首 5 項 (“1” 為非常嚴重, “2” 為次嚴重, …)
香港						
1. 銀行貸款	1	2	3	4	5	_____
2. 人民幣滙率變動	1	2	3	4	5	_____
3. 與內地資金流動不暢順	1	2	3	4	5	_____
4. 租金不斷上漲	1	2	3	4	5	_____
5. 人才流失	1	2	3	4	5	_____
6. 市場波動	1	2	3	4	5	_____
7. 其他 (請註明) _____	1	2	3	4	5	_____
內地						
8. 工資不斷上漲	1	2	3	4	5	_____
9. 原材料不斷上漲	1	2	3	4	5	_____
10. 知識產權的保護	1	2	3	4	5	_____
11. 公平營商環境	1	2	3	4	5	_____
12. 內地專業人員 (法律、會計) 的質素	1	2	3	4	5	_____
13. 獲得內地銀行融資	1	2	3	4	5	_____
14. 內地勞動合同的實施	1	2	3	4	5	_____
15. 內地環保的要求 / 排污的管制	1	2	3	4	5	_____
16. 內地地方政府執行法規的質素	1	2	3	4	5	_____
17. 內地「民工荒」	1	2	3	4	5	_____
18. 政策不明朗	1	2	3	4	5	_____
19. 其他 (請註明) _____	1	2	3	4	5	_____

C. 在營運及發展遇到困難時，貴公司有否運用以下營商策略？其成效如何？

	無採用	成效 極大	成效 頗大	成效 一般	成效 輕微	成效 極小
1. 減低成本						
a. 裁員	<input type="checkbox"/>	1	2	3	4	5
b. 本地化	<input type="checkbox"/>	1	2	3	4	5
c. 外判部份生產工序	<input type="checkbox"/>	1	2	3	4	5
2. 開拓市場	<input type="checkbox"/>	1	2	3	4	5
3. 建立品牌	<input type="checkbox"/>	1	2	3	4	5
4. 增加員工培訓及福利	<input type="checkbox"/>	1	2	3	4	5
5. 縱向合併或結盟	<input type="checkbox"/>	1	2	3	4	5
6. 橫向合併或結盟	<input type="checkbox"/>	1	2	3	4	5
7. 內部重組	<input type="checkbox"/>	1	2	3	4	5
8. 基地轉移 (目的地:_____)	<input type="checkbox"/>	1	2	3	4	5
9. 科研與開發						
a. 改善生產流程	<input type="checkbox"/>	1	2	3	4	5
b. 產品或服務開發	<input type="checkbox"/>	1	2	3	4	5
10. 其他 (請註明)_____	<input type="checkbox"/>	1	2	3	4	5

III. 未來的展望及政府政策

A. 貴公司預計未來三年的情況：

1. 營業額的表現： 非常樂觀 審慎樂觀 中性
 悲觀 非常悲觀
2. 有意將香港業務： 擴充 _____% 不變 收縮 _____%
3. 有意將內地業務： 擴充 _____% 不變 收縮 _____%
4. 有意將國外業務： 擴充 _____% 不變 收縮 _____%
5. 會否打算開拓新市場： 會 (地點：_____) 否

B. 貴公司對以下香港特區政府政策的看法：

	不清楚	有效	無效
1. 營運設備及器材信貸保證計劃	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. 人力培訓 (如資歷架構等)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. 中小企業市場推廣基金	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. 中小企業發展支援基金	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. 中小企業信貸保證計劃	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. 特別信貸保證計劃	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. 投資研發現金回贈計劃	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. 其他：_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. 貴公司希望香港特區政府如何加強幫助中小企業持續發展？ (可選擇多於一項)

- 給予利得稅的稅務優惠
- 加強市場推廣及提供有效的市場訊息
- 推動企業之間的凝聚力
- 協助港商保護知識產權
- 協助推動建立內銷平台及網絡
- 提供機器設備折舊的免稅額
- 資助港商研發
- 資助專利申請費
- 爭取擴大人民幣兌換機制
- 提供國際法律諮詢或援助

其他意見：_____

D. 貴公司希望內地政府如何加強幫助港資企業持續發展？(可選擇多於一項)

- 爭取擴大人民幣流通量
- 擴大人民幣貿易結算的範圍
- 保護知識產權
- 協助推動建立內銷平台及網絡
- 提供市場信息
- 簡化審批和規管的手續

其他意見：_____

多謝你的寶貴時間和意見！

閣下提供的資料均**絕對保密**，調查結果將以整體匯報；保證絕不外洩個別公司資料。為答謝貴公司參與調查，本會將調查結果的報告送交貴公司，並邀請貴公司出席日後的發佈會。以便日後聯絡，請提供以下資料。

公司名稱： _____

聯絡人： _____

電郵： _____

地址： _____

Appendix 2

Support to SMEs by HKSAR Government Departments and Others

	Area	Programme	Department
A.	General	Support and Consultation Centre for SMEs	Trade and Industry Department
		Industrial Support Publications	
		SME Resources Online Marketplace	Hong Kong Trade Development Council
		升轉一站通服務平台 (TURN) (Chinese Version Only) Industry Support Services	Hong Kong Productivity Council
B.	Innovative Products / Design	Design-Business Collaboration Scheme Design Smart Initiative	Create Hong Kong
		Intellectual Capital Management Consultancy Programme	Intellectual Property Department, HKSAR Government
		Innovation & Technology Fund	Innovation and Technology Commission
C.	Capital	Special Loan Guarantee Scheme SME Loan Guarantee Scheme SME Development Fund SME Export Marketing Fund	Trade and Industry Department
D.	New Market Development	Insurance Protection	Hong Kong Export Credit Insurance Corporation
		粵港珠寶產業內銷聯盟 (Chinese Version Only)	Hong Kong Productivity Council
		Powering SMEs Development Programme Marketing Information Guidelines for Doing Business	Hong Kong Trade Development Council
E.	Consultancy and Advisory	Domestic Sales Driven Support Services Pilot Programme to Assist SMEs in Achieving Sustainability Free Consultancy Services to SMEs	Hong Kong Productivity Council
		Business Advisory Services and China Business Advisory Services Business Matching	Hong Kong Trade Development Council
		SME Mentorship Programme	Trade and Industry Department
		HKTDC SME Advisory Service	Hong Kong Trade and Development Council SME Centre

Appendix 3 Training Programmes for SMEs

	Programme	Department
1.	SME Mentorship Programme	Support and Consultation for SMEs (SUCCESS) Trade and Industry Department
2.	Seminars for SME on: Web marketing, starting a business, etc.	
3.	SME Training Programme	Hong Kong Science and Technology Parks
4.	Diploma in "SME Company Operations & Management" *	Hong Kong Productivity Council
5.	'Wise Business' SME Summit	
6.	中小企管理工作坊：「九型人格商業管理技巧」	Hong Kong Trade and Development Council SME Centre
7.	中小企創業工作坊：「連鎖及特許經營策略」	
8.	Executive Certificate in Entrepreneurship & SME Management	Hong Kong University School of Professional and Continuing Education
9.	Diploma in Management Studies for SME Executives	The Open University of Hong Kong
10.	Diploma in Business Management *	The Hong Kong Management Association and Lingnan University
11.	中小型企業東主及管理人士課程 *	Hong Kong Institute for Vocational Training Education (IVE)
12.	中小企業資訊科技培訓計劃 (Free)	Manufacturing Enterprise Integration and Innovation Association (MEIIA)
13.	製造業中小型企業資訊科技培訓計劃 (Free)	Hong Kong Wireless Technology Industry Association
14.	Pilot Workshop on 'SMEs' Brand Strategic Management (Free)	Hong Kong Brand Development Council The Chinese Manufacturers' Association of Hong Kong The Hong Kong Polytechnic University
15.	Introductory Workshop on "Trio Survival Kit for SME"	The Chinese Manufacturers' Association of Hong Kong
16.	"Building Brand Equity Seminar for SMEs: Real-life Branding in China"	

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refer to website of individual department for more information

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