

LSCM MARKET INTELLIGENCE REPORT

A Market Intelligence Study on Enabling Technologies for
Industries related to Logistics & Supply Chain Management

ISSUE 5 – Freight Forwarding/3PL
June 2009



Hong Kong R&D Centre for Logistics and
Supply Chain Management Enabling Technologies
香港物流及供應鏈管理應用技術研發中心



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BACKGROUND

INTRODUCTION

Hong Kong R&D Centre for Logistics and Supply Chain Management Enabling Technologies (LSCM R&D Centre) is established with funding support from the Innovation and Technology Commission of the HKSAR Government and is commissioned to provide a one-stop shop for technology transfer and commercialization through the following roles:

- Conduct industry-oriented research
- Provide technology and market intelligence
- Provide a platform for exchange of intellectual property/technology
- Promote technology development, transfer and knowledge dissemination
- Facilitate intellectual property commercialization

Since inception, the LSCM R&D Centre was given the mission to foster the development of core competencies in applied R&D in logistics and supply chain related technologies and facilitate adoption of these technologies by industries in Hong Kong and mainland China. Our long-term goal is to strengthen Hong Kong's economic competitiveness and maintain its position as a world-class leading logistics hub in the PRD region.

This Project, titled **"A Market Intelligence Study on Enabling Technologies for Industries related to Logistics & Supply Chain Management"** is to empower the logistics and supply chain community in Hong Kong and PRD region with market and technology intelligence for industry users to locate and adopt new technologies, for technology vendors to identify market needs so as to develop relevant applications and for R&D parties to gain inspiration from global technology landscape and to identify prevailing technology gaps for further R&D.

This Publication, namely "LSCM Market Intelligence Report (Issue 5) – June 2009" is to share findings from on-site company visit exercise focusing on freight forwarding industry. In addition to technology and market challenges based on interviews with those in this field, we also cover the latest follow up to China's RFID industry development in this issue. To download all past reports and learn more about this project, visit www.lscm.hk/mi.



BACKGROUND

PROJECT TEAM

It has been our mission to provide market intelligence and we place emphasis on enabling technologies which are essential for us to carry on our commitment and dedication to technology development. To support the study, the Project Team has pulled in expertise from the LSCM R&D Centre as well as professionals from the industry in Hong Kong and mainland China to take a combination of approaches to gather industry problems, technology needs and technology development gaps in Hong Kong and PRD while keeping a close watch on technologies, policies and standards developments in China.

To gather extensive market intelligence from logistics and supply chain community in Hong Kong and PRD, the Project Team is proud to partnering with the **Hong Kong Productivity Council** and **Research Center for Modern Logistics Technology and Management of Lingnan (University) College, Sun Yat-Sen University** to carry out the collaborative work in the region. They are experienced in conducting surveys and have good industry network to support our broad-based market study. In addition, the Project Team is working in close collaboration with the **HKU School of Business** in the preparation of findings and insightful analysis out of this market study. This consultancy support includes sharing and discussion of reference materials, advice on writing approach, research expertise and efficient feedback.

Hong Kong Productivity Council

Hong Kong Productivity Council (HKPC) is a public body established by legislation of Hong Kong with 40 years of history in serving manufacturing and related servicing industry. The mission of HKPC is to help Hong Kong enterprises to improve productivity and enhance value along the value chain in terms of consultancy service, training, technology transfer and other programs.

Role in the Project

- Advise on research methodology
- Carry out in-depth interviews with enterprises in Hong Kong
- Liaise with local industries and promote project results

Research Center for Modern Logistics Technology and Management Lingnan (University) College, Sun Yat-Sen University

Founded in July 2002, Research Center for Modern Logistics Technology and Management is a leading research institute of Sun Yat-sen University. The mission of the Center is to foster excellence in cutting-edge logistics research, education, and industrial collaboration in order to promote the development of modern logistics in China.

The Center is committed to research, education, and industrial collaboration of various aspects of logistics management. Logistics problems among the research domains of the Center include logistics system analysis and design, regional logistics strategy and planning, organizational logistics system design and optimization, distribution center design, transportation management and routing optimization, organizational supply chain management, management information systems in logistics and supply chain.



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Role in the Project

- Carry out in-depth interviews with enterprises in PRD
- Liaise with industries in PRD and promote project results

School of Business, The University of Hong Kong

The HKU School of Business was established after its transformation from the Department of Management Studies in the Faculty of Social Sciences in 1995. Since then, the School of Business has rapidly expanded its variety of programs in terms of major and minor subjects, as well as enhances its intake of the best and the brightest local and non-local students. Apart from offering academic programmes, the Faculty of Business & Economics organizes its research and teaching development activities in clusters through research centres that draw on members within the Faculty and across campus. The research outputs delivered by the Faculty are highly recognized and treated as a leading source of innovative thinking for government and business in Hong Kong and the region.

Role in the Project

- Advise on research direction and provide perspectives in writing market intelligence reports

On the China Watch part, the Project Team has partnered with **RFID China Alliance** to have a close watch on the new developments in China. It has an extensive network that the project team members can leverage in gathering information about technology adoption, policy changes and development of national RFID standard in China.

RFID China Alliance

RFID China Alliance is the only non-profit industrial association on RFID in China. The Alliance, comprised of RFID chip, label, middleware, reader, and printer solution providers, was founded on Nov 5, 2005, under the leadership of the Ministry of Information Industry (MII) of the People's Republic of China. Its core responsibility is to promote RFID's industrial development in China, and provide up-to-date information on RFID Chinese governmental policy, latest technological developments while holding an open attitude on RFID standards and protocol.

Role in the Project

- Closely monitor the policy and standard developments in China
- Provide regular update on RFID adoption and application among industries in China



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PROJECT TEAM

The following are core members of the Project:

Project Coordinator and Principal Investigator

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LSCM R&D Centre

Deputy Project Coordinator and Co-Investigator

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BACKGROUND

ACKNOWLEDGEMENTS

The Project Team would like to thank many organizations and individuals who have contributed to the development of this publication.

We would like to record our sincere appreciation for the following companies, which participated in in-depth interviews to share invaluable opinions with us. The report could not have been produced without their willingness to assist the project team in understanding the change in industry trends and technology needs.

APL Logistics, Ltd.
AGI Logistics (Hong Kong) Limited
A-Sonic Air Freight (H.K.) Limited
A-Sonic Marine (H.K.) Limited
Dimerco Air Forwarders (HK) Ltd
Diversified Freight System Limited
ESS Cargo Services Limited
Hellmann Hong Kong Limited
IRS Logistics (HK) Ltd.
Schenker International (HK) Limited
The Janel Group of Hong Kong Ltd.
Yusen Air & Sea Service (H.K.) Ltd.

We would like to express our appreciation to the following industry support organizations, which helped us to promote the project activities and related results by all means.

Digital Trade and Transportation Network Limited
Federation of Hong Kong Industries - Transport and Logistics Services Council
GS1 Hong Kong
Guangdong and Hong Kong Feeder Association Limited
Guangdong RFID Technology Service Center
Hong Kong Association of Freight Forwarding And Logistics Ltd
Hong Kong CFS and Logistics Association Ltd
Hong Kong Electronics & Technologies Association
Hong Kong Logistics Association
Hong Kong Productivity Council
Hong Kong Science & Technology Parks Corporation
Hong Kong Shippers' Council
Hong Kong Trade Development Council
Hong Kong Wireless Development Centre
Hong Kong Wireless Technology Industry Association



BACKGROUND

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Hong Kong

Hong Kong Productivity Council
Dr. Lawrence Cheung
School of Business, The University of Hong Kong
Dr. Benjamin Yen

Pearl River Delta

Research Center for Modern Logistics Technology and Management Lingnan (University) College, Sun Yat-Sen University
Prof. Chen Gongyu Dr. Zhang Hongbin

China

RFID China Alliance
Madam Zhang Qi Mr. David Ouyang

We own special thanks to our external consultant, **Ms. Grace Wong** who offered her efficient support and competence in carrying out research and processing views received.

Last, and most important, thanks to the colleagues of the LSCM R&D Centre-specifically Management Team, Industry and Technology Programs Team, Administration Team and PR & Corporate Communication Team for their dedication and unfailing support to this project.





Remember to Submit your R&D Project Applications by 23 June 2009

The LSCM R&D Centre is now inviting applications for research and development projects in the following technology areas:

1. **RFID Hardware and Systems**, special focus will be placed on:
 - RFID Testing and Qualification
 - Low Cost RFID Tag Manufacturing Techniques
 - RFID Hardware and Systems Development for Manufacturing and Packaging Industries
 - RFID Beyond Gen2
2. **Networking and Infrastructure Technologies**, special focus will be placed on:
 - Enabling Technologies for Enterprise e-Logistics Internetworking
 - On-Demand Technologies for Logistics Application Software Service Platforms
3. **Applications and Decision Support Technologies**, special focus will be placed on:
 - Enabling Technologies for Mobile Logistics
 - Enabling Technologies in Electronic Seal Based Logistics
 - Sensor-enabled Logistics Applications
 - Positioning Technologies and Optimization in Asset Tracking and Monitoring
 - RFID Systems for Specific Environments

Please visit www.lscm.hk for detailed description of the topics and requirements.

Deadline for Applications:
23 June 2009, 5:00 pm (HK Time)

Release of Annual Report on RFID Development in China 2008-2009

With the strong support from The State Leading Group Office of Golden Cards Project Coordination P.R.C., the **Annual Report on RFID Development in China 2008-2009** was successfully co-published by RFID China Alliance and CCW Research in early June this year. This report presents latest status and characteristics of China and global RFID markets as well as analysis on various RFID applications and development trends. For a complete index of this report or for those who would like to purchase a copy, visit www.rfidchina.org.

Solicitation of Proposals: 2009 Guangdong-Hong Kong Technology Cooperation Funding Scheme

The LSCM R&D Centre is inviting project proposals for the **2009 Guangdong-Hong Kong Technology Cooperation Funding Scheme (TCFS)** in the following technology areas:

1. **RFID Enabling Technologies for Manufacturing and Logistic Industries**
2. **Enabling Technologies for Container Logistics and Business Internetworking**
3. **Industry-specific Item Level Tagging and Service Technology**

The TCFS aims to enhance the level of collaboration on R&D between organizations in Hong Kong and Guangdong Province. Projects funded by the TCFS will have to demonstrate an element of Guangdong/Hong Kong cooperation (e.g. collaboration between research institutes and enterprises in Guangdong and Hong Kong). Please visit www.lscm.hk for specific topic/themes and application procedures.

Deadline for Applications:
3 July 2009, 5:00 pm (HK Time)

Share your Views on LSCM Market Intelligence Report

In order to improve the quality of our reports and bring readers with valuable market and technology intelligence, we invite you to complete the reader opinion form in Appendix C.

To download all past reports and learn more about the project **"Market Intelligence Study"**, visit www.lscm.hk/mi.



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

In the light of the background as introduced, one of the main roles of the LSCM R&D Centre includes empowering the logistics and supply chain community in Hong Kong and PRD with market and technology intelligence. The LSCM R&D Centre was awarded a 2-year project, titled **"A Market Intelligence Study on Enabling Technologies for Industries related to Logistics & Supply Chain Management"** in 2008 to focus its efforts on the study of enabling technology areas which are of the greatest industry concerns. Accordingly, the release of a suite of **LSCM Market Intelligence Report** that offers industry players with analytical results from in-depth interviews from a wide spectrum of industries is a major work that we have been undertaking. We have benefited from the views gathered through a series of on-site company visits, forums and meetings along with finding cause for both requirement and concern from local industries. To provide both research users and providers with a comprehensive view on RFID industry development, we also offer featured report on policy, standardization and the adoption & application of RFID Technology in relevant industries in China on a regular basis.

Global third-party logistics (3PL) industry faces increasing challenges in times of economic downturn. On one hand industry players experience pressures on thinner margin, on the other hand they have to enhance their service offerings and improve operational efficiency to meet increasing demands from customers. In this report, we examine respondents' current I.T. adoption status and how they face with unfavorable business environment. When asked which level describes the best their current I.T. application status, only 20% of the respondents believed that they are in the stage of "Full I.T. implementation with integration with both internal and external system". Given that the current usage of *Warehouse Management System (WMS)*, *Cargo/Shipment Locater* and *Global Positioning System (GPS)* are rated as the top three most popular applications adopted by freight forwarders, respondents were then asked which technologies they would like to add to their current use. There was no prominent selection but demands on different areas were shown, they included applications for *Transportation Process*, *Warehouse & Distribution*, *Purchasing/Supplier Relationship*, *Supply Chain Track & Trace* and *Customer Relationship*, etc. On the other hand, around 70% of surveyed companies said their systems have no integration with terminals and they would like to receive additional information/service like *Status of Flight/Cargo/Container*, *Cargo Utilization Plan* and *Dynamic Price* from terminals. The study also found that executives focused very much on improvement on operational efficiency and service performance when looking to upgrade supply chain technological capabilities. It is apparent that the economic burden was shared among logistics and supply chain industries, respondents expressed that *Increased Fuel Service Charge/Cost*, *Worsen Business Environment* and *Global Economic Downturn* were three of the top concerns. Meanwhile, it is worth noting that 79% of the respondents agreed that I.T. is critical for enhancing company's competitiveness. Despite the severe economic environment, respondents expected to invest more on I.T. development in terms of I.T. expenditure. A remarkable increase has shown for companies with investment ratio (% to revenue) ranged over 9% from the current distribution of 17% to 31% in the future. On business development strategies, only 25% of the respondents revealed that they would start development domestic trade business. The recent economic recession may partially explain the relatively low intention. Nevertheless, Chinese mainland is a vast market for 3PL service providers; many Hong Kong-based logistics firms are already operating



EXECUTIVE SUMMARY

successfully on the market. It is recommended that Hong Kong small-to-medium logistics companies should ride on the CEPA opportunity to explore the promising mainland market (*Details refer to **Section 2-6 of Broad Coverage***).

In last issue, we reported the Chinese Government's practical measures to stimulate domestic demand and boost economic growth. In this report, we look at the software and service industry in a new context amid the global financial crisis. Although this industry has been affected by the economic downturn since the second half of 2008, the crisis brought more opportunities for structural shift and development. The revenue of the software and service industry in China maintains a high growth rate of 30% in 2008 indicating that the huge market in the country is buffering the impact from the global financial crisis to some extent. The article "Policy of China RFID Industry Development" published in the "**Global/China Watch**" section shares the key contents in the "Supporting Policies and Measures for the Software and Service Industry (Document No. 18)" to be revised and issued by the Software Service Department of the Ministry of Industry and Information Technology (MIIT). According to the article, there will be some adjustments and new opportunities for the development of the software and service industry including: (i) New growth in open-source software; (ii) Promising E-commerce market for SMEs; (iii) Fast development of cloud-computing-based network service; and (iv) New opportunities from industrial consolidations. In addition, the revenue growth rate of the electronic information industry in China is projected to be around 15% in 2009 and down to 20% for software's in 2009 (*Details refer to **Section 1-4, "Policy of China RFID Industry Development" of Global/China Watch***).

Other updates in the article include the monetary policy defined in January 2009 at the Work Conference of PBOC and the National Forex Management 2009 aiming to maintain growth in this year. It is clearly stated by the conference that the total money supply for 2009 is targeted at around 3-4 percentage points higher than the sum of the GDP growth rate and inflation, with M2 (broad money supply) up by approximately 17%. A combination of policy instruments such as interest rate, deposit-reserve ratio, and open market operations will be utilized to adjust the money supply and demand in a flexible manner. Innovative financial instruments can also be applied to maintain proper liquidity in the market, if necessary (*Details refer to **Section 5, "Policy of China RFID Industry Development" of Global/China Watch***).

Lastly, we look at some announcements in last quarter of 2008 by the Ministry of Industry and Information Technology (MIIT), the Ministry of Science and Technology (MOST) and the National Development and Reform Committee (NDRC) concerning key technologies development, foreign investment and information security respectively. These included: (i) Notification of Project Application under the Key and Special Projects in Critical Electronic Device, High-end Generic Chip, and Fundamental Software Product and the related guidelines; (ii) The Catalogue of Advantaged Industries for Foreign Investment in the Central-Western Region; (iii) Guidelines for the Application for Key Projects in Research and Development (R&D) and Pilot Applications of UWB Wireless Communication System under the 863 Program; and (iv) Notification on Relevant Matters on Organization and Implementation of the Special Program on Information Security 2009 (*Details refer to **Section 6-9, "Policy of China RFID Industry Development" of Global/China Watch***).

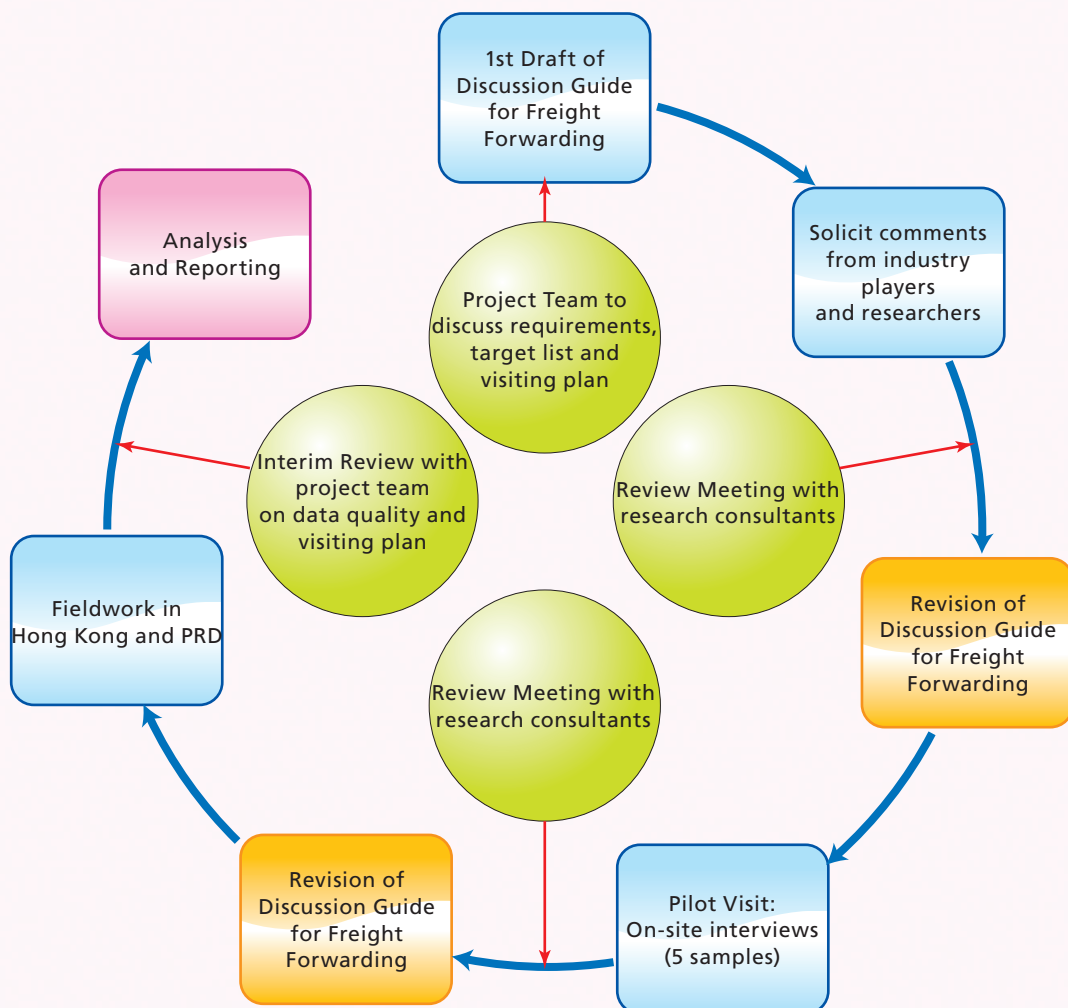


BROAD COVERAGE



BROAD COVERAGE

The essential details presented in this section are based on information collected from 20 freight forwarding companies (10 from Hong Kong and 10 from mainland China). All interviews were carried out by research consultants between October 2008 to March 2009, the average duration per interview took approximately 1.5 to 2 hours. For each company, the research consultant is required to probe opinions and stimulate discussion surrounding the company's current I.T. application level in business & operation processes, demand and aspiration to new technologies, user requirement specifications, adoption and barriers to new technologies, industry issues as well as how government policies will affect industry operations. To maintain consistency of interview approach, a suite of industry focused discussion guide was in use (Appendix A) and the following diagram outlines the methodology of the study.





BROAD COVERAGE

PROFILE OF PARTICIPANTS

1 Profile of Participants

1.1 Profile of Participants by Service Coverage

Among the 20 participants who engaged in the freight forwarding industry, they offered different types of services which were summarized in the following table. All participants provided core services including Sea Freight, Sea/Air, Warehouse and Distribution and Contract Logistics. Majority of them have also covered Air Freight, Customs and Cargo Insurance Brokerage as well as Exhibition & Removal. It is worth noting that over half of the surveyed companies (accounted for 60%) have covered all services as listed in the table.

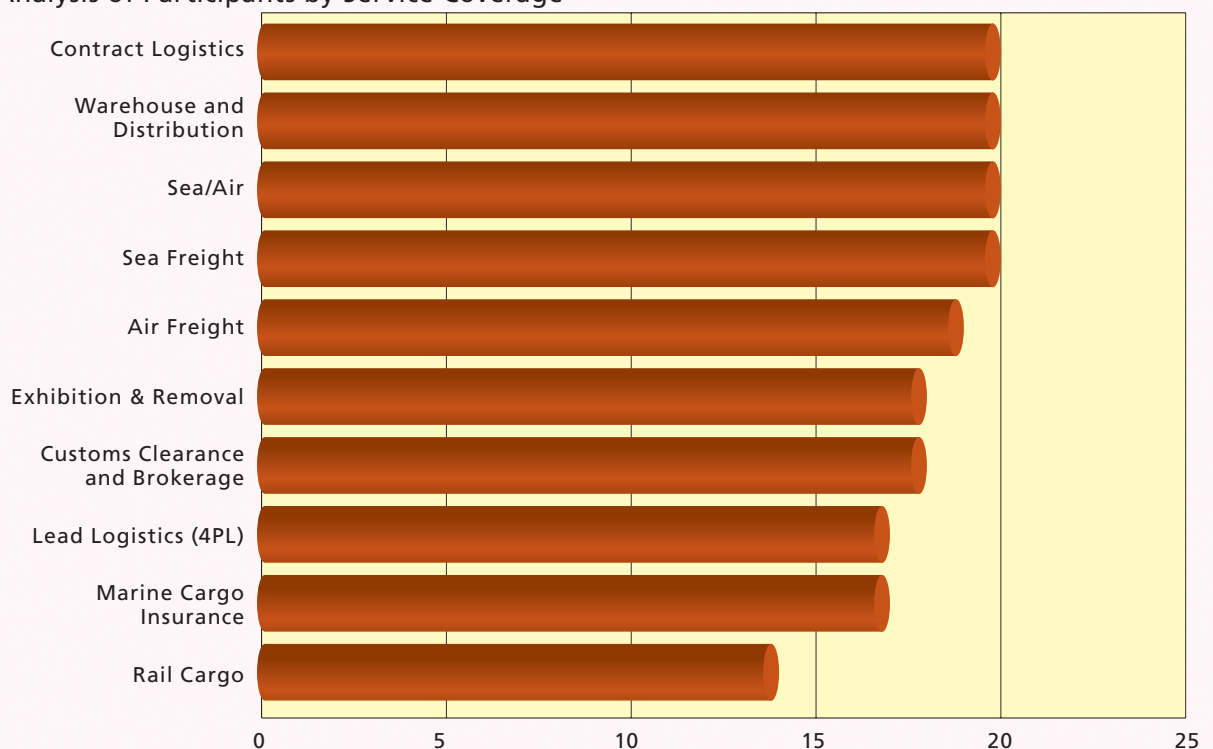
1.1 Table

Analysis of Participants by Service Coverage

Service Coverage	Number of Participants	%
Sea Freight	20	100%
Sea/Air	20	100%
Warehouse and Distribution	20	100%
Contract Logistics	20	100%
Air Freight	19	95%
Customs Clearance and Brokerage	18	90%
Exhibition & Removal	18	90%
Marine Cargo Insurance	17	85%
Lead Logistics (4PL)	17	85%
Rail Cargo	14	70%

1.1 Chart

Analysis of Participants by Service Coverage





BROAD COVERAGE

PROFILE OF PARTICIPANTS

1.2 Profile of Participants by Cargo Handling Capability

Among the 20 participants, all of them processed with Temperature Controlled Cargo handling capability; majority of the participants (accounted for 90%) could handle Reefer Cargo & Perishable Goods; whereas 15 out of 20 (accounted for 75%) could provide Dangerous Cargo handling capability. Details were summarized in the following table.

1.2 Table

Analysis of Participants by Cargo Handling Capability

Cargo Handling Capability	Number of Participants	%
Temperature Controlled Cargo	20	100%
Reefer Cargo & Perishable Goods	18	90%
Dangerous Cargo	15	75%

1.3 Profile of Participants by Employee Size

In terms of employee size, 40% of our surveyed companies employed less than 1,000 staffs. Employee size between 1,001 – 5,000 ranked second (accounted for 30%); whereas employee size between 5,001-10,000 and over 10,000 both accounted for 15% each. Details were summarized in the following table.

1.3 Table

Analysis of Participants by Employee Size

Number of Staffs	Number of Participants	%
<1,000	8	40%
1,001-5,000	6	30%
5,001-10,000	3	15%
>10,000	3	15%
Total	20	100%



BROAD COVERAGE

PROFILE OF PARTICIPANTS

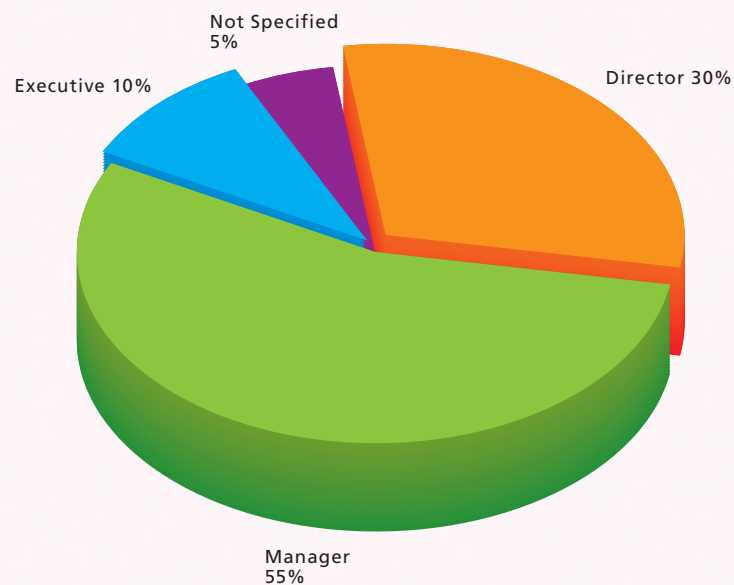
1.4 Profile of Participants by Job Title

Among the 20 respondents participating in this survey, 17 out of them were graded Director or Manager (accounted for 85%). Details were summarized in the following table.

1.4 Table
Analysis of Participants by Job Title

Job Title	Number of Participants	%
Director	6	30%
Manager	11	55%
Executive	2	10%
Not Specified	1	5%
Total	20	100%

1.4 Chart
Analysis of Participants by Job Title





BROAD COVERAGE

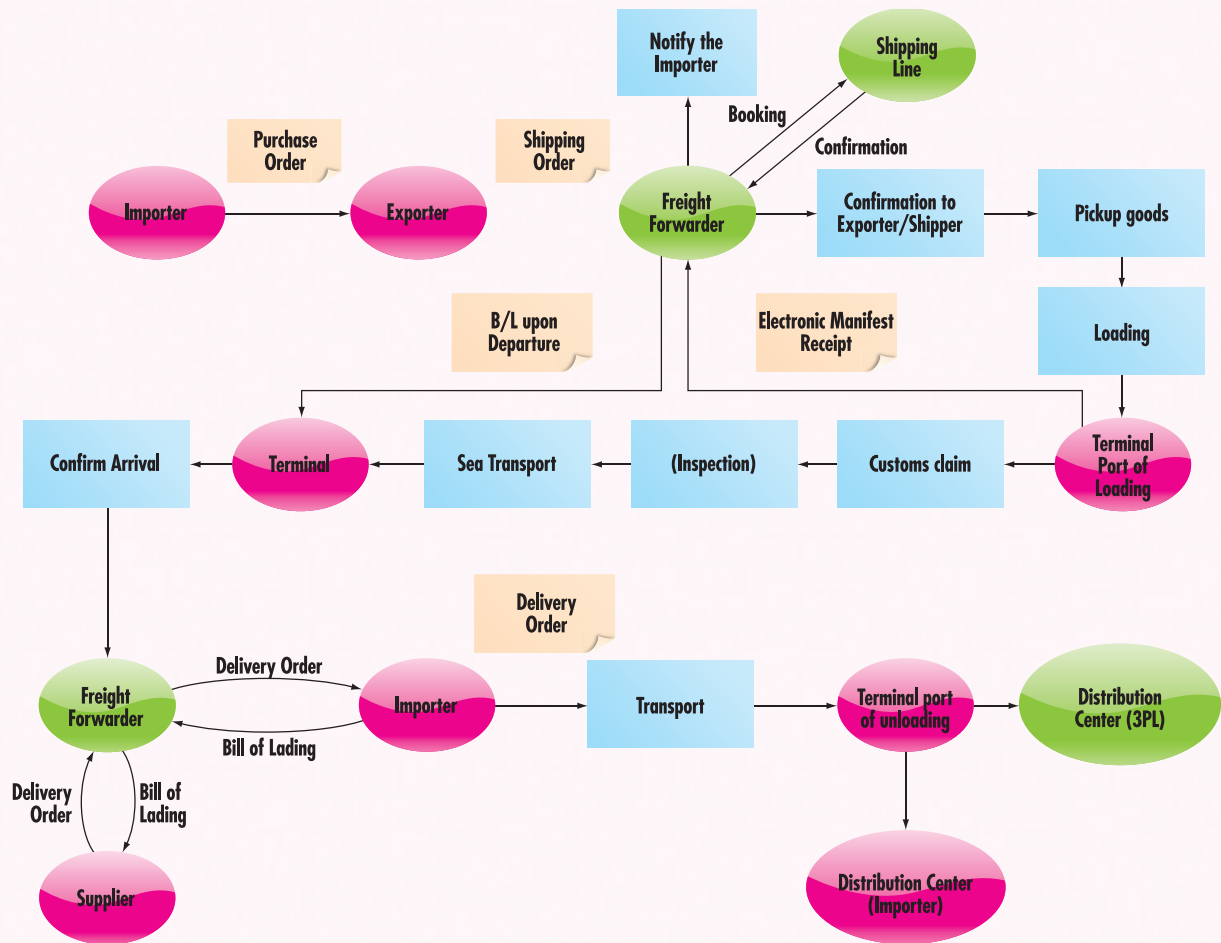
FINDINGS

2 Business Process

In this section, participants explained their business and operation processes to identify information flows and required technology needs. It was found that their businesses were running like what we described in below generic workflow diagram for freight forwarding industry.

2 Diagram

Generic Workflow Diagram of Freight Forwarding Industry





BROAD COVERAGE

FINDINGS

2.1 Analysis on Current Freight Management System

Based on the information provided by the 20 freight forwarders, 45% said they purchased their Freight Management Systems from technology providers; it was followed by self developed (accounted for 40%); whereas 15% of the respondents revealed that they further developed their purchased systems. Details refer the following table.

2.1 Table
Analysis on Current Freight Management System

Mode	Number of Participants	%
Self Developed	8	40%
Purchased from Technology Provider	9	45%
Further Develop the Purchased Version	3	15%
Total	20	100%

2.2 Analysis on Functionality of Freight Management System

When asked the functionality of Freight Management System, the findings indicated that Customer Relationship Management (CRM) and Reporting were the two most popular functions provided by their systems, both of them accounted for 95%; it was followed by Data Analysis (accounted for 65%) and Load Planning (accounted for 45%). Detailed findings were summarized in the following table.

2.2 Table
Analysis on Functionality of Freight Management System

Functions	Number of Participants	%
Data Analysis	13	65%
Load Planning	9	45%
Customer Relationship Management	19	95%
Reporting	19	95%

2.3 Analysis of Satisfaction Level on Freight Management System

Participants were further prompted to examine their satisfactory level towards their current freight management systems (Satisfactory Level: 1=Less satisfactory; 5=Most satisfactory). The satisfactory levels rated by freight forwarders from Hong Kong and mainland China were similar, (rated 3.4 out of 5 and 3.35 out of 5 respectively). The average score across all participants was 3.38, details refer the following table.

2.3 Table
Analysis of Satisfaction Level on Freight Management System

Satisfactory Level	5-point Scale
Hong Kong	3.40
Mainland China	3.35
Total (Hong Kong and mainland China)	3.38



BROAD COVERAGE

FINDINGS

2.4 Analysis on Level of Integration with Internal and External Stakeholders

The 20 freight forwarders were asked to provide information on their current system integration competency with internal and external stakeholders. It is worth noting that more than half of the surveyed companies (accounted for 60%) had integrated their systems with both internal and external stakeholders; it was followed by integrated with internal only (accounted for 25%), only 10% said they had integrated neither internally nor externally. Detailed findings were shown in the following table.

2.4 Table

Analysis on Level of Integration with Internal and External Stakeholders

Level of Integration	Number of Participants	%
External only	1	5%
Internal only	5	25%
Both Internal and External	12	60%
Neither Internal nor External	2	10%
Total	20	100%

2.5 Analysis of Communication Methods in Handling Bookings

Among the 20 freight forwarders, the findings indicated that majority of them were using traditional methods like email/fax/telephone to receive bookings (accounted for 50%); web portal (e-booking) ranked second (accounted for 25%); EDI and XML ranked last which accounted for 25% in total.

2.5 Table

Analysis of Communication Methods in Handling Bookings

Communication Methods	%
Web Portal (e-booking)	25%
Email/Fax/Telephone	50%
EDI	17%
XML	8%
Total	100%



BROAD COVERAGE

FINDINGS

2.6 Analysis on Challenges in Current Booking Procedures

The 20 freight forwarding participants provided information on whether they face challenges in their current booking procedures. 8 out of 20 (accounted for 40%) participants indicated that they were facing challenges in their current booking procedures. Among them, 56% claimed that they encountered problems in Receiving P.O., it was followed by Customers' I.T. Competency (accounted for 33%) and Infrastructure Issues (accounted for 11%).

2.6a Table

Analysis on Challenges in Current Booking Procedures

Facing Challenges? (Y/N)	Number of Participants	%
Yes	8	40%
No	12	60%
Total	20	100%

2.6b Table

Analysis on Issues in Current Booking Procedures

Issues in Current Booking Procedures	%
Customers' I.T. Competency (i.e. Lack of e-booking)	33%
Receiving P.O. (Incompetent office automation/Clients' unclear order descriptions)	56%
Infrastructure Issues (Power shut down/server crash)	11%
Total	100%

2.7 Analysis of Satisfactory Level on Information Provided by Airlines/Ocean Carriers

The 20 freight forwarding participants provided information on their satisfaction level towards information provided by airlines/ocean carriers. Slightly over one-third of the participants (accounted for 35%) rated Overall Satisfactory whereas 11 out of 20 (accounted for 55%) rated the opposite. Details refer the following table.

2.7 Table

Analysis of Satisfactory Level on Information Provided by Airlines/Ocean Carriers

Satisfaction to Information from Airlines/Ocean Carriers	Number of Participants	%
Overall Satisfactory	7	35%
Overall Unsatisfactory	11	55%
Not Specified	2	10%
Total	20	100%



BROAD COVERAGE

FINDINGS

2.8 Analysis on Integration with Terminals

When asked whether they had integration with terminals, majority of them (accounted for 70%) indicated that they did not integrate with terminals. The participants were further asked to express opinion on what kind of additional information they expected from terminals, 50% of the respondents indicated that they would like to receive information on Status of Flight/Cargo/Container. It was followed by Cargo Utilization Plan (33%) and Dynamic Price (17%), detailed findings were shown in the following tables.

2.8a Table

Analysis on Integration with Terminals

Integration with Terminals? (Y/N)	Number of Participants	%
Yes	5	25%
No	14	70%
Not specified	1	5%
Total	20	100%

2.8b Table

Analysis on Additional Information from Terminal

Additional information Expected from Terminal	%
Status of the Flight/Cargo/Container	50%
Dynamic Price	17%
Cargo Utilization Plan	33%
Total	100%

2.9 Analysis on Truck Management Mode

The mode of truck management among the 20 freight forwarding participants was examined. Among them, 11 out of 20 (accounted for 55%) managed their own trucks and also adopted outsourcing. 8 out of 20 (40%) indicated they only adopted outsourcing mode.

2.9 Table

Analysis on Truck Management Mode

Mode of Truck Management	Number of Participants	%
Own Trucks and Outsourcing	11	55%
Outsourcing Only	8	40%
Own Trucks Only	1	5%
Total	20	100%



BROAD COVERAGE

FINDINGS

3 Current I.T. Applications

In this section, current I.T. applications and level of usage out of the 20 freight forwarding companies were examined.

3.1 Analysis on Current I.T. Applications

The 20 freight forwarding participants were asked to provide information on their current I.T. applications. Among the various applications, Warehouse Management System (WMS), Cargo/Shipment Locator and Global Positioning System (GPS) were the top three most popular applications adopted by participants, which accounted for 80%, 55% and 55% respectively.

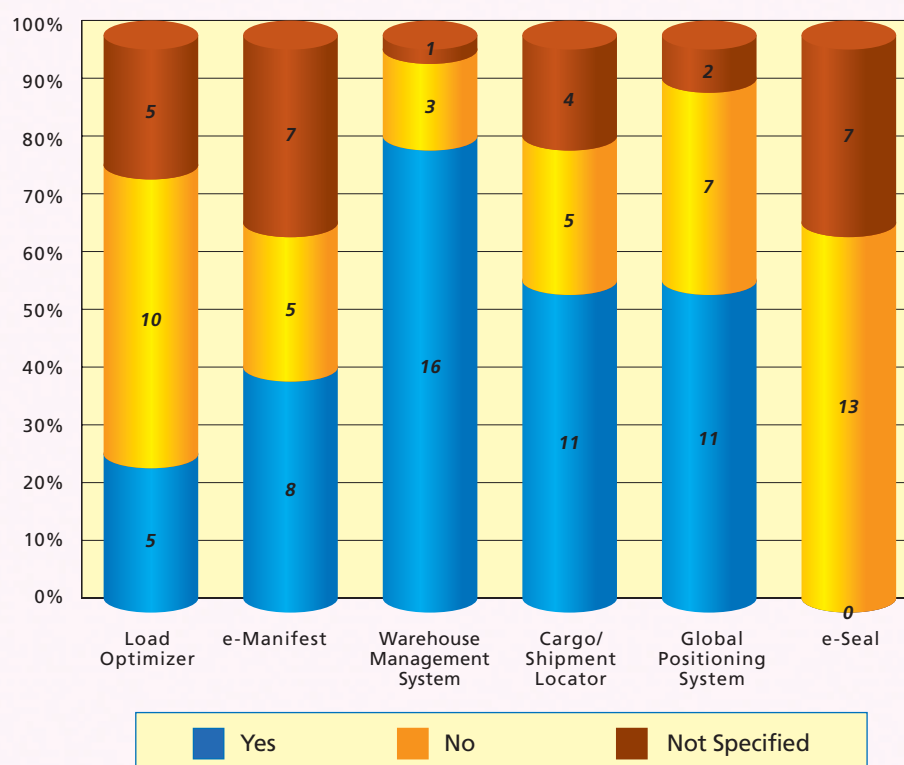
3.1 Table

Analysis of Participants' Current I.T. Applications

Applications	Yes	No	Not Specified	Total
Load Optimizer	5	10	5	20
e-Manifest	8	5	7	20
Warehouse Management System	16	3	1	20
Cargo/Shipment Locator	11	5	4	20
Global Positioning System	11	7	2	20
e-Seal	0	13	7	20

3.1 Chart

Analysis of Participants' Current I.T. Applications





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3.2 Analysis on Current I.T. Application Status

In this Section, participants were asked to select the most descriptive sentence for their current I.T. application status. The majority of the respondents believed they were in the stage of “Apply limited I.T. solution to automate a specific area of operations (e.g. document management system, warehousing system but not full ERP, finance & accounting system only, etc.)” or “Full I.T. implementation with integration with other internal systems”, accounted for 40% each. Whereas the remaining 20% said they were in the stage of “Full I.T. implementation with integration with both internal and external system”. Results were summarized in the following table.

3.2 Table

Analysis of Participants’ Current I.T. Applications Status

Current I.T. Application Status	Number of Participants	%
1 Totally manual, no hardware & software	0	0%
2 No knowledge and awareness of I.T. application. The company has no I.T. solution to solve for daily operating issues (except MS Office, public email account, etc.)	0	0%
3 Have knowledge and awareness of I.T. application but don’t use any I.T. solution (except MS Office, public email account, etc.)	0	0%
4 Apply limited I.T. solution to automate a specific area of operations (e.g. document management system, warehousing system but not full ERP, finance & accounting system only, etc.)	8	40%
5 Full I.T. implementation with an integration with other internal systems	8	40%
6 Full I.T. implementation with an integration with both internal and external systems	4	20%
Total	20	100%



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4 I.T. Applications Barriers and Concerns

In this section, the biggest challenges in I.T. applications and the motivating factors perceived by participants for adopting I.T. were examined. In addition, participants were prompted to rank the importance of several attributes/consideration factors in deploying I.T. application in their companies.

4.1 Analysis on Major Challenges Perceived by Participants

The 20 freight forwarders were asked to indicate the major challenges they faced with technology adoption (1=Less challenging; 5=Most challenging). The findings indicated that Difficult to Assess ROI ranked highest (accounted for 47%), followed by Limited budget (accounted for 45%) and Difficult to Cope with Rapid and Vary Customer Expectation (accounted for 35%). Details refer the following table.

4.1 Table

Analysis on Major Challenges Perceived by Participants

Challenges for I.T. Applications	Number of Respondents	Rating on 4 to 5 (Challenging to Most Challenging)	%
Difficult to Assess ROI	19	9	47%
Limited Budget	20	9	45%
Difficult to Cope with Rapid and Vary Customer Expectation	20	7	35%
Lack of Industry/ Government Support	19	6	32%
Data Integration	19	6	31%
User's Recognition on Application Value is Low	18	3	17%
Difficult to Cope with Rapid Technological Changes	19	3	16%
Complexity of Application	19	3	16%
Shortage of Skilled I.T. People	20	3	15%

4.2 Analysis on Motivating Factors

When asked the motivating factors in deciding to enhance or upgrade their technological capabilities and customer offerings (1=Less important; 5=Most important), 100% said they would look for technology that Improves Operation Efficiency/Productivity. It was followed by Increase Service Performance (accounted for 89%) and Improves Customer Satisfaction (accounted for 80%). The findings were summarized in the following table.

4.2 Table

Analysis on Motivating Factors

Motivating Factors	Number of Respondents	Weighed (Least to Most Important)	%
Improves Operational Efficiency/Productivity	19	19	100%
Increases Service Performance	17	19	89%
Improves Customer Satisfaction	16	20	80%
Reduces Human Error	11	19	58%
Enhances Corporate Image	11	19	58%
Increases Company Profitability	8	19	42%
Differentiates Themselves from Competitors	8	19	42%
Build up Long-term Relationship	8	19	42%
Clear ROI	4	18	22%



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4.3 Analysis on Rankings among Various Attributes (Hong Kong vs. Mainland China)

In addition, the 10 freight forwarders from Hong Kong were prompted to rank on 5 concern areas in deploying I.T. application (People/Price/Technology/Time/Solution Providers' Capabilities). Among them, 9 respondents shared views with us and the majority ranked Technology as top concern (accounted for 44%), it was followed by Price (accounted for 33%) and Solution Providers' Capabilities (accounted for 22%). On the other hand, the 10 freight forwarders from mainland China were prompted to rank on 6 concern areas on an I.T. application (People/Price/Technology/Time/Solution Providers' Capabilities/Solution Appropriateness). In a total of 10 respondents' provided information, the majority ranked Solution Appropriateness as top concern (accounted for 60%), it was followed by Technology (accounted for 30%) and Solution Providers' Capabilities (accounted for 10%). The findings were summarized in the following tables.

4.3a Table

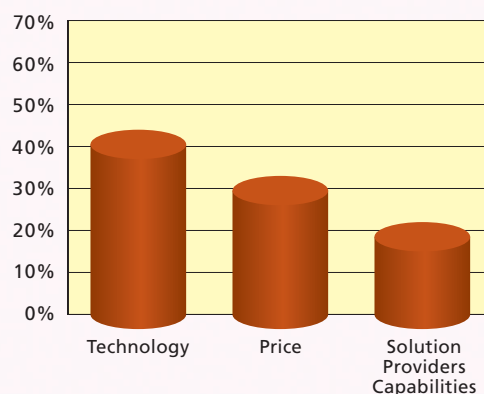
Analysis on Rankings among Various Attributes (Hong Kong)

Attributes	Number of Respondents	%
Technology	4	44%
Price	3	33%
Solution Providers' Capabilities	2	22%
Total	9	100%

Remarks: The above figures are rounded to the nearest integer

4.3a Chart

Analysis on Rankings among Various Attributes (Hong Kong)



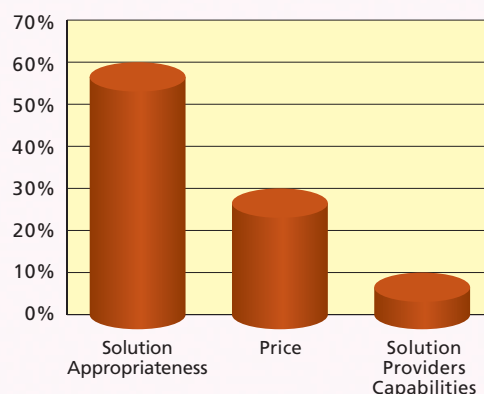
4.3b Table

Analysis on Rankings among Various Attributes (Mainland China)

Attributes	Number of Respondents	%
Solution Appropriateness	6	60%
Technology	3	30%
Solution Providers' Capabilities	1	10%
Total	10	100%

4.3b Chart

Analysis on Rankings among Various Attributes (Mainland China)





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5 Industry Trends/Characteristics

5.1 Analysis on Industry Trends/Characteristics

In this Section, we discussed industry trends and characteristics with participants and in what ways it would affect the technology needs of freight forwarding industry. The opinion indicated that Increased Fuel Service Charge/Cost was the most obvious trend, which accounted for 33%; followed by Worsen Business Environment and Global Economic Downturn; which accounted for 29% and 21% respectively.

5.1 Table
Analysis on Industry Trends/Characteristics

Industry Trends/Characteristics	%
Increased Fuel Service Charge/Cost	33%
Worsen Business Environment (Slim margin, fierce competition, etc.)	29%
Global Economic Downturn	21%
Enhanced Credit Control to Minimize Risk	8%
Others (Lack of cargo in the market, market consolidation, etc.)	8%
Total	100%

5.2 Analysis on Micro/Macro Trends

When asked the micro/macro trends that would affect their business operation, the findings suggested that 86% of the respondents regarded Economy Downturn had great impact to their business operations, it was followed by Global M&A (accounted for 50%) and New Labor Law (accounted for 43%). The findings were summarized in the following table.

5.2 Table
Analysis on Micro/Macro Trends

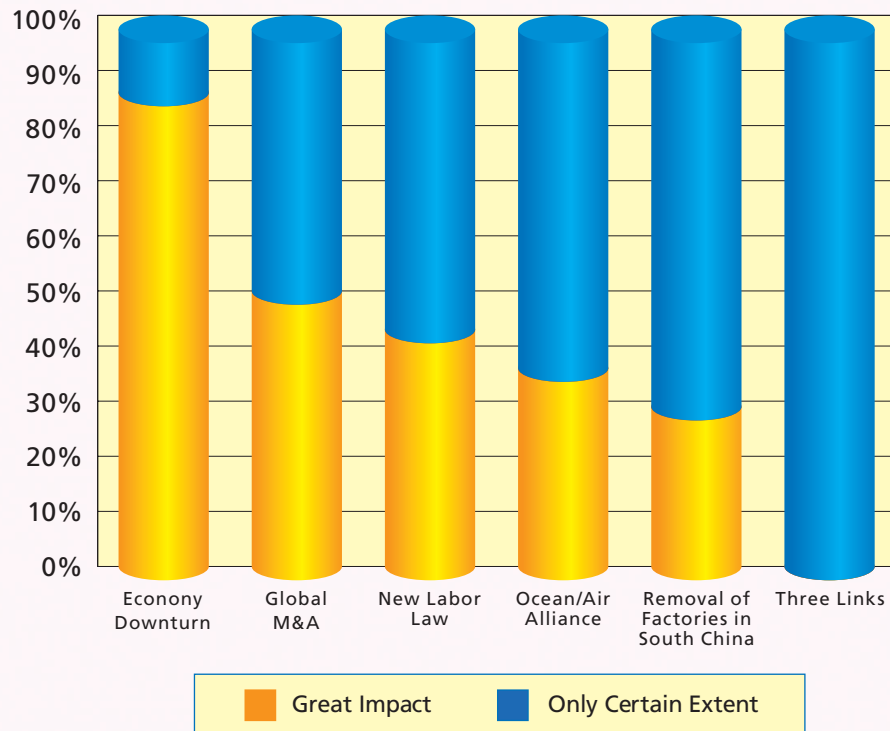
Micro/Macro Trends	Great Impact	Only Certain Extent
Economy Downturn	86%	14%
Global M&A	50%	50%
New Labor Law	43%	57%
Ocean/Air Alliance	36%	64%
Removal of Factories in South China	29%	71%
Three Links	0%	100%



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5.2 Chart

Analysis on Micro/Macro Trends



5.3 Analysis on Strategic Development Plan for Domestic Trade

With respect to micro/macro trends which affected their business operation, respondents were further prompted to advise whether they would start developing domestic trade business. The findings indicated that only one-fourth of the respondents would start domestic trade business.

5.3 Table

Analysis on Strategic Development Plan for Domestic Trade

Will Start Domestic Trade	%
Yes	25%
No	75%
Total	100%



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6 Future I.T. Applications

In this section, the 20 respondents were invited to provide information on their current I.T. investment and their future I.T. applications were examined.

6.1 Analysis on Current vs. Future I.T. Expenditure

Participants were asked to provide information on the percentage of the total investment in their I.T. adoption (Current I.T. investment % to Revenue). 39% said their I.T. investment level fell in the range of 4% to 6%, it was followed by Less than 1% (accounted for 17%). Whereas for the future I.T. investment expenditure, the majority fell into the range of Over 9%, it was followed by 1%-3% and 4%-6%, both of them accounted for 25%.

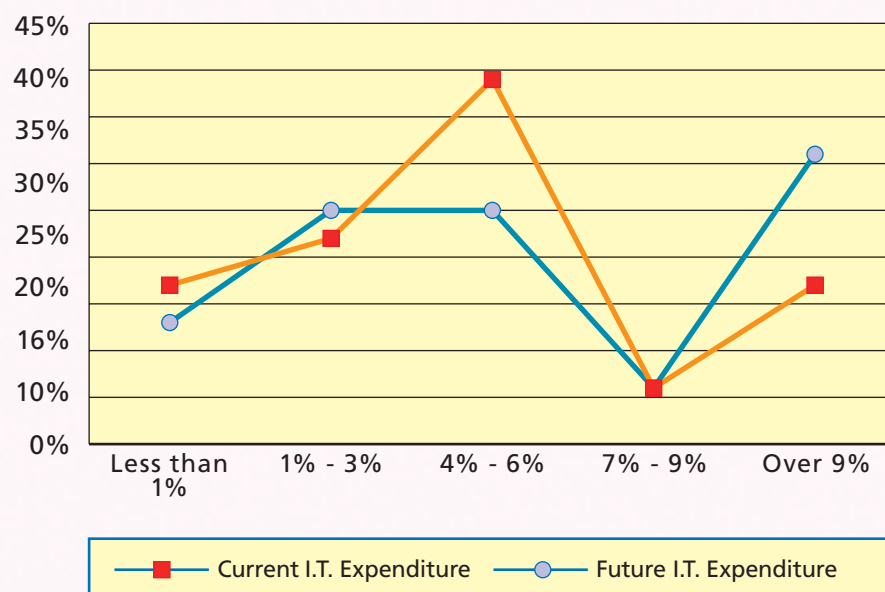
6.1 Table

Analysis on Current vs. Future I.T. Expenditure

I.T. Investment % to Revenue	Current I.T. Expenditure	Future I.T. Expenditure
Less than 1%	17%	13%
1% - 3%	22%	25%
4% - 6%	39%	25%
7% - 9%	6%	6%
Over 9%	17%	31%
Total	100%	100%

6.1 Chart

Analysis on Current vs. Future I.T. Expenditure





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6.2 Analysis on Future I.T. Applications

The 20 freight forwarders were asked to provide comments on their future I.T. strategic plan. The findings suggested that applications to be developed for Transportation Process and Warehousing & Distribution ranked the highest, both accounted for 12%; whereas Purchasing/Supplier Relationship ranked second, which accounted for 11%. The findings were summarized in the following table.

6.2 Table

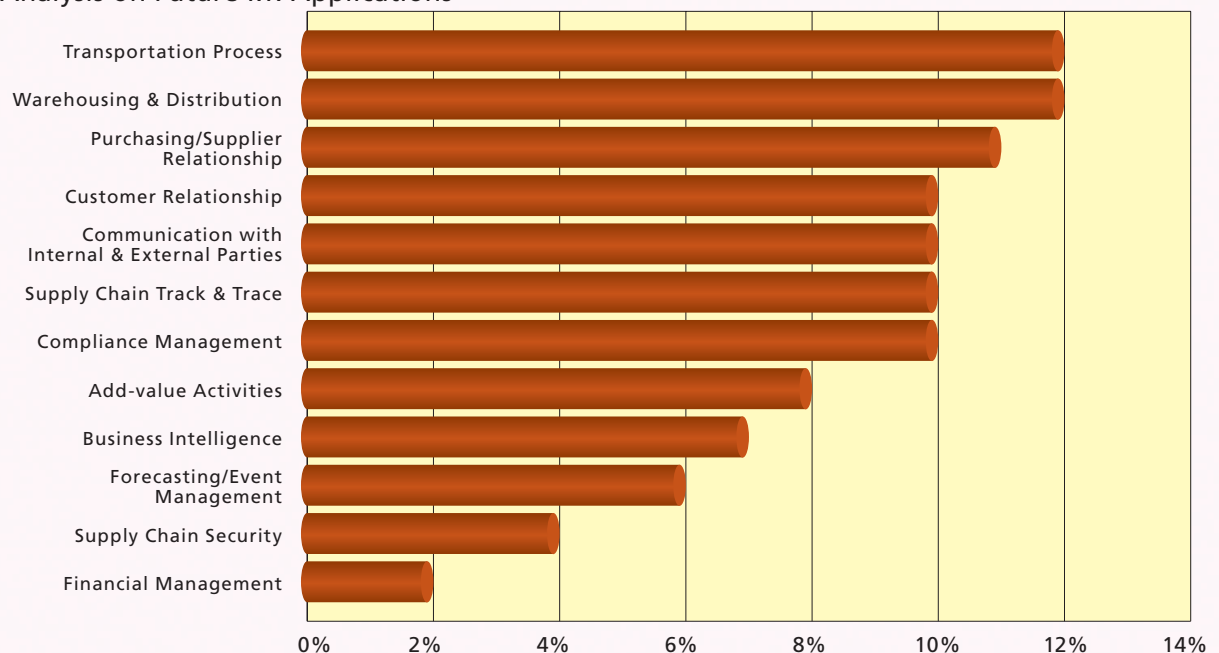
Analysis on Future I.T. Applications

Future I.T. Applications	%
Transportation Process	12%
Warehousing & Distribution	12%
Purchasing/Supplier Relationship	11%
Customer Relationship	10%
Communication with Internal & External Parties	10%
Supply Chain Track & Trace	10%
Compliance Management	10%
Add-value Activities	8%
Business Intelligence	7%
Forecasting/Event Management	6%
Supply Chain Security	4%
Financial Management	2%
Total	102%

Remarks: The above figures are rounded to the nearest integer

6.2 Chart

Analysis on Future I.T. Applications





BROAD COVERAGE FINDINGS

6.3 Analysis of Views on I.T. Applications/Initiatives

When asked their views on various I.T. applications/initiatives, they included Business/Operation Intelligence, Software-as-a-Service (SaaS), e-Documentation, RFID and Wireless Applications, it was indicated that Business/Operation Intelligence received the highest reorganization (accounted for 58%); it was followed by SaaS (accounted for 53%) and e-Documentation (accounted for 42%).

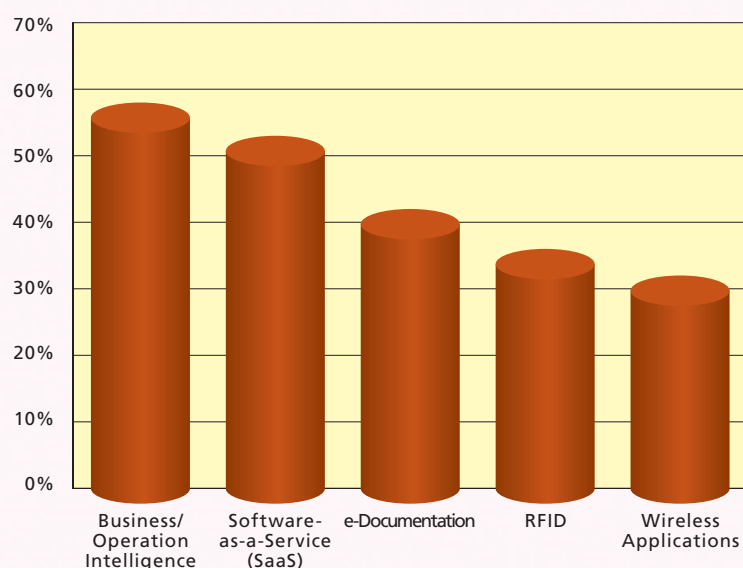
6.3 Table

Analysis of Views on Applications/Initiatives

Applications/Initiatives	%
Business/Operation Intelligence	58%
Software-as-a-Service (SaaS)	53%
e-Documentation	42%
RFID	36%
Wireless Applications	32%

6.3 Chart

Analysis of Views on Applications/Initiatives



6.4 Analysis on Whether I.T. is Able to Enhance Company's Competitiveness

The 20 freight forwarders were further asked to provide opinion on whether I.T. is able to enhance the company's competitiveness, close to 80% of the respondents agreed that I.T. is critical for enhancing company's competitiveness.

6.4 Table

Analysis on Whether I.T. is Able to Enhance Company's Competitiveness

I.T. is Critical for Enhancing Company's Competitiveness	%
Agree	79%
Disagree	21%
Total	100%



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7 R&D Demand & Aspiration

7.1 Analysis of Interested Areas on LSCM Roadmap

In this Section, participants were asked to indicate their interested areas of LSCM R&D roadmap. Among the 20 participants, there were 16 participants provided opinions and they were summarized as follow.

RFID Hardware & System

7 out of 16 (44%) of the participants indicated that they were interested in Theme 1 “Low Cost RFID Tag Manufacturing Techniques”.

Networking & Infrastructure Technologies

11 out of 16 (69%) of the participants were interested in Theme 6 “Enabling Technologies for Enterprise e-Logistics Internetworking and 5 out of 16 (19%) of the participants indicated that they were interested in Theme 5 “On-Demand Technologies for Logistics Application Software Service Platforms”.

Applications & Decision Support Technologies

11 out of 16 (69%) of the participants indicated that they were interested in Theme 8 “Enabling Technologies for Mobile Logistics”.

7.1 Table

Summary of Interested Areas on LSCM R&D Roadmap

Themes	Number of Respondents	%
RFID Hardware & System		
Theme 1 “Low Cost RFID Tag Manufacturing Techniques” is set on easing the cost issue of adoption and deployment for RFID	7	44%
Theme 2 “RFID for Manufacturing and Packaging Industries” stresses on easy use of RFID for product manufacturers who need to tag product shipment with RFID	2	13%
Theme 3 “RFID Testing and Qualification” targets for helping users to test and select appropriate RFID solutions to best fit their use	1	6%
Theme 4 “RFID beyond Gen 2” is to push the envelope of current RFID technology to support practical applications for range, accuracy, security, memory and sensor requirements	4	25%
Networking & Infrastructure Technologies		
Theme 5 In the infrastructure technologies track steers for low-barrier adoption of logistics I.T. with the approach of “On-Demand Technologies for Logistics Application Software Service Platforms”	3	19%
Theme 6 “Enabling Technologies for Enterprise e-Logistics Internetworking”, fostering the use of I.T. for logistics integration, addresses the common problem in industry for effective and efficient business process integration across enterprise boundary	11	69%



BROAD COVERAGE

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7.1 Table

Summary of Interested Areas on LSCM R&D Roadmap (Continue)

Themes	Number of Respondents	%
Applications & Decision Support Technologies		
Theme 7 "RFID Systems for Specific Environments" will foster the development for RFID application systems for niche but critical requirements in common logistics operations	3	19%
Theme 8 "Enabling Technologies for Mobile Logistics" encourages innovative applications for distribution and delivery which are mobile in nature	11	69%
Theme 9 "Sensor-enabled Logistics Applications" will enable automation in cargo monitoring	5	31%
Theme 10 "Positioning Technologies and Optimization for Asset Tracking and Monitoring" will add to the capability of real-time cargo tracking	3	19%
Theme 11 "Enabling Technologies in Electronic Seal Based Logistics" participates in the contemporary e-seal standards development which is taking place actively not only in the global arena but also across the local border of Hong Kong and Shenzhen	2	13%

7.2 Analysis of Views on LSCM's Contribution

In this Section, respondents were asked whether they agreed the contribution of LSCM R&D Centre. Among the 20 respondents, 15 of them provided information and they believed the long-term goal of LSCM R&D Centre could contribute to strengthen the competitiveness of Hong Kong's economic.

7.2 Table

Analysis of Views on LSCM's Contribution

Contribution of LSCM R&D Centre	Number of Participants	%
Yes	15	100%
No	0	0%
Total	15	100%



BROAD COVERAGE RECOMMENDATIONS

8.1 Third-party Logistics Strategic Positioning

Global third-party logistics (3PL) industry faces increasing challenges in times of economic downturn. On one hand industry players experience pressures on thinner margin, on the other hand they have to enhance their service offerings and improve operational efficiency to meet increasing demands from customers.

In Section 5.1, companies expressed their concerns amid difficult business environment, executives felt that *Increased Fuel Service Charge/Cost*, *Worsen Business Environment* and *Global Economic Downturn* were three of the top concerns. Respondents' concerns on global economic recession were further elaborated in Section 5.2 while micro and macro trends affected logistic practitioners were further examined. The findings indicated that *Economy Downturn* posed the most significant impact to logistic practitioners (86%), it was followed by *Global M&A* (50%). However, they regarded the impact of *Three Links* to their business operations as "only to a certain extent".

I.T. is perceived as one of the effective means to enhance company's competitiveness. To date, customers have high expectations from their logistics service providers in terms of service and I.T. capabilities. In fact, 79% of the respondents agreed that I.T. is critical for enhancing company's competitiveness (Section 6.4). Despite the severe economic environment, respondents expected to invest more on I.T. development in terms of I.T. expenditure. A remarkable increase has shown for companies with investment ratio (% to revenue) ranged over 9% from the current distribution of 17% to 31% in the future (Section 6.1).

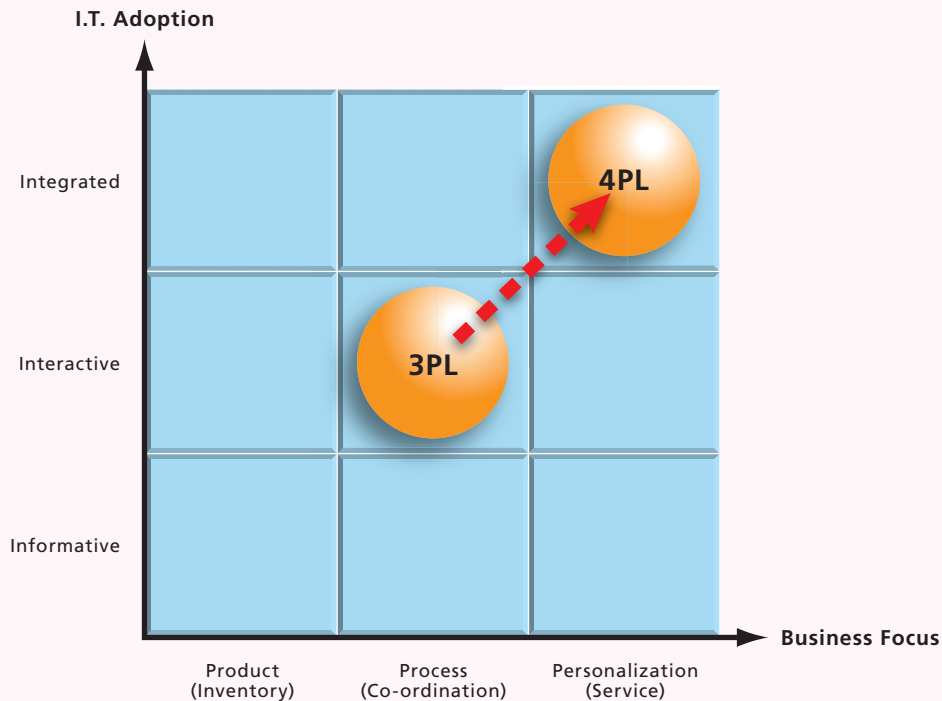
The primary motivating factors for respondents adopting I.T. were examined in Section 4.2. The findings indicated that the top three motivating factors were *Improves Operational Efficiency/Productivity*, followed by *Increases Service Performance* and *Customer Satisfaction*. To this end, I.T. adoption can better equip companies with enhanced processes that lead to higher operational efficiency and improvements on service offerings.

It is crucial to identify the current position and problems faced by companies before deciding the strategic targeted position. In this study, all the 20 respondents have covered 3PL services for their customers. As indicated in Section 3.2, 40% of the respondents rated themselves in the stage of "*Full I.T. implementation with integration with other internal systems*"; whereas another 40% regarded themselves in the stage of "*Apply limited I.T. solution to automate a specific area of operation*". According to diagram 8.1a, the majority of the respondents are in the *Interactive* stage in terms of I.T. adoption where they have engaged in the inter-company information exchange. For the remaining 20% of the respondents, they were in the stage of "*Full I.T. implementation with integration with both internal and external systems*". They are engaged in the co-ordination of information processing with both internal and external stakeholders in the *Integrated* stage. On the Product technology adoption, all companies are in the *Process* stage where they streamline the processes to ship, distribution, or forward the product and some of them have engaged in customized service management in the *Personalization* stage.



BROAD COVERAGE RECOMMENDATIONS

8.1a Diagram
Third-party Logistics Strategic Positioning



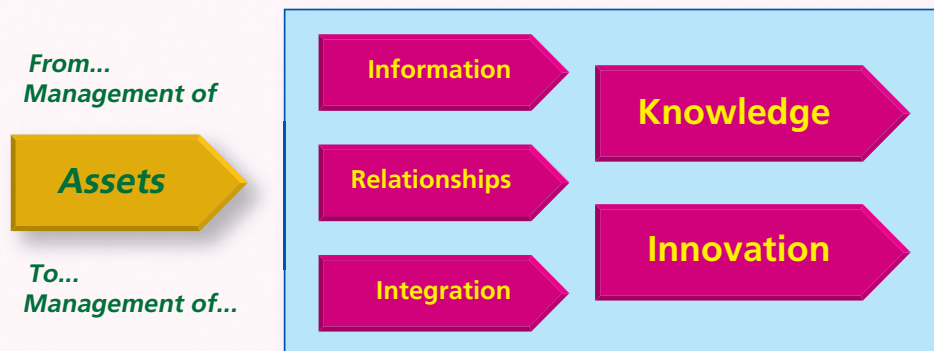
In addition, in this study we can see that the majority of the freight forwarding companies is already in a competent strategy position as 85% (17 out of 20) of the respondents have covered Lead Logistics (4PL) services. 4PL is the evolution of supply chain outsourcing; 4PL coordinates other 3PL suppliers for the contracting firm. Essentially the 4PL firm manages the logistics service on behalf of the contracting customer. In addition, 4PL firms provide advanced I.T. services, consultancy and risk management to their clients. When compare with 3PL service providers, 4PL enjoys several distinctive benefits. First, 4PL provider maintains primary accountability and quality within the arrangement. Second, 4PL has the overarching responsibility for supply chain performance; and 4PL should be able to impact the entire supply chain – increasing revenue, lowering costs, reducing working capital and fixed capital. Diagram 8.1b illustrates five attributes of 4PL services: from management of assets to management of information, relationship and integration. To achieve this stage and deliver knowledge and innovation to clients, the use of I.T. contributes to all five attributes. For instance, visibility tools which are web-enabled, collaboration tools like inventory and warehouse management, document exchange, transportation and event management as well as supplier relationship management are areas where companies could potentially offer value-added services through I.T. adoption.



BROAD COVERAGE RECOMMENDATIONS

8.1b Diagram

Five Attributes of 4PL Services



Source: C. John Langley Jr., Ph.D.

In order to study the characteristics of those companies who engaged in 4PL services, five are selected to further review among the 17 respondents which provide 4PL services. It is found that all the five logistics providers are competent in adopting I.T. in their business operations. For instance, they are all using web portal (e-Booking) in receiving bookings. In addition, they are all fully integrated with both internal systems and external stakeholders. With reference to diagram 8.1a, these five logistics providers are positioned at the top right corner of the strategic position map. Logistic practitioners are recommended to strategically shift upwards to the position of 4PL by providing more value-added services to meet customers' needs and keep responsive to environmental changes.

8.2 Growing Needs in Freight Management System

In this study, all of the 20 respondents are currently using Freight Management System (FMS) in their operations. As indicated in Section 2.3, the average score across all participants was 3.38 out of 5 towards their current FMS. In terms of features offered by FMS, it was found that the most common features were *Customer Relationship Management and Reporting*, both accounted for 95%. However, the use of *Data Analysis and Load Planning* were relatively low, only 65% and 45% of the respondents indicated that their current FMS could provide such functions respectively.

Low e-Documentations competency created another operational inefficiency for the freight forwarders. In Section 2.6, 40% of the respondents commented that they had challenges in handling bookings. Among them, 56% indicated that the most challenging issue was Receiving P.O., it included incompetent office automation and clients' unclear order descriptions. Respondents explained that some ocean bookings sent via fax were occasionally missed due to human mistakes. The ocean bookings to the ocean carrier could not access to fax in the peak season and hour. Respondents spent too much resource to make sure the bookings had been sent. In addition, some respondents commented that it was inefficient to generate multiply P.O.s in a booking request in their current systems. The current countermeasure was to encourage customers to place bookings through e-mail or e-booking system. However, according the findings from Section 2.6, the current usage of web portal (e-Booking), EDI and XML were low, with only 25% and 8% respectively.



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In fact, a competent FMS can improve logistic company's overall operational efficiency to meet escalating customers' demands. Apart from generic features like quotation and invoice generation, automated data extraction; advanced features of FMS included data exchange with external parties, managerial report, financial position tracking, automated document assembly and generation and end-of-workflow validation at flight closing, etc.

In Section 2.8, 70% of the respondents indicated that their systems have no integration with terminals; in addition, respondents stated that they want to receive additional information like *Status of Flight/Cargo/Container* (50%); *Cargo Utilization Plan* (33%) and *Dynamic Price* (17%) from terminals.

With I.T. integration with internal systems and external stakeholders, the achievement is not confined to enhance operation accuracy, more importantly, instant information exchange, total information visibility, real-time collaboration can achieve higher customer satisfaction.

8.3 CEPA Opened the Door to Access PRC Logistics Market

The Closer Economic Partnership Arrangement (CEPA) signed between Hong Kong and the Mainland government in 2003 has created a beneficiary environment for Hong Kong logistics firms to operate on the PRC market.

PRC's ever-growing manufacturing industry create stronger demand for competent 3PL service providers, PRC manufacturers face increasing overseas customers' demand on 3PL professionalism as the traditional delivery service cannot meet their requirements. They tend to accept the concept of outsourcing their supply chain activities to specialist 3PLs whose services include warehousing and transportation, supply chain management, distribution and inventory management with advanced I.T. solutions as a backup.

Since PRC's WTO accession and as the mainland logistics market gradually opens up, foreign players have entered the market at an accelerated pace. As a whole, the logistics market in the PRD ranks among the most advanced regions in China. For example, Shenzhen, the 4th largest container port in the world, sets itself to be the logistic hub. There are over 2,000 companies that have logistic business in Shenzhen. Six logistics parks have been set up. Over 50 foreign companies including UPS, Maersk, FedEx, Kerry Logistics, etc. have registered in the city. MNCs like Aeon, IBM and Wal-Mart have set up global or regional sourcing centers there.

In Section 5.1, only 25% of the logistic participants indicated that they have planned to start the domestic trade business. The recent economic recession may partially explain the relatively low intention preference. Nevertheless, PRC is a vast market for 3PL service providers; many Hong Kong-based logistics firms are already operating successfully on the market. It is recommended that Hong Kong small-to- medium logistics companies should ride on the CEPA opportunity to explore the promising mainland market.



BROAD COVERAGE RECOMMENDATIONS

8.4 LSCM to Facilitate Technology Adoption by Industries through Market-driven R&D

When looking toward what future I.T. applications/initiatives companies would recognize, the findings suggested that *Business/Operation Intelligence* and *Software-as-a-Service (SaaS)* were two of the top responses. The enthusiasm for applications related to *e-Documentation*, *RFID* and *Wireless* was not fully shown, with 42%, 36% and 32% of the respondents recognized the values respectively (Section 6.3). There were different reasons expressed by the respondents, 33% concerned the liability and security on e-Documentation; 16% of the respondents regarded wireless applications were expensive; whereas for RFID, 29% regarded it was expensive and 11% believed the application was immature. Interestingly, close to 70% of the respondents rated "*Enabling Technologies for Enterprise e-Logistics Internetworking*" and "*Enabling Technologies for Mobile Logistics*" as the two most likely interested R&D areas. Likewise, 44% voted for "*Low Cost RFID Tag Manufacturing Techniques*" aiming to ease the cost issue of adoption and deployment for RFID.

"*Enabling Technologies for Enterprise e-Logistics Internetworking*" refers to the use of I.T. for logistics integration, addressing the common problem in industry for effective and efficient business process integration across enterprise boundary. Meanwhile, "*Enabling Technologies for Mobile Logistics*" encourages innovative applications for distribution and delivery which are mobile in nature. This is particularly important for the freight forwarding industry, while so many enterprises will need to be supported with mobile solutions by the fast growing wireless technologies, the gap for adoption of mobile solutions is still severe among the majority of logistics operators. To enhance the competitive advantage of local industries and nurture the technology enabled environment, the LSCM R&D Centre has been taking the lead to carry out innovative research and development to improve the accessibility for these technologies for the industries. In September 2008, a LSCM funded project "Enhancing the Competitiveness of the Hong Kong Air Freight Forwarding Industry Using RFID and Software Agent Technologies" was started to develop a basic RFID-based air cargo processing system and employ software agents to facilitate the important task of flight planning. There were also projects running to support and facilitate the deployment of RFID technology in other RFID applications in Hong Kong and PRD region, they included: Package-specific RFID Tagging and Embedding Technology, Interoperability Technology and Applications for Container RFID and e-seal, etc. For a full list of our projects and R&D programs available for industry and research collaboration, please visit www.lscm.hk.



GLOBAL / CHINA WATCH



1. Financial Policies and Measures discussed and deployed by the State Council aimed at giving a boost to the economy

On December 3, 2008, Premier Wen Jiabao convened an executive meeting of the State Council to discuss and lay out financial policies and measures that will improve the economy. Relevant policies and measures were agreed upon after the discussion at the meeting.

- (i) Carry out moderately easy monetary policy and enable the steady increase of money and credit;
- (ii) Strengthen and improve the credit service to meet the national demand in finance;
- (iii) Speed up the development of a multi-level capital market system to enable the market to allocate resources;
- (iv) Develop insurance for security, as well as financing to ensure a stable economy and society;
- (v) Innovate financing ways and broaden the channels of corporate finance;
- (vi) Improve foreign exchange management and facilitate vigorous drive in the market investment;
- (vii) Speed up the modernization of the financial service to improve the service level in all aspects;
- (viii) Step up support for financial and taxation reforms;
- (ix) Continue the financial reform, improve the regulatory regime, and strengthen the risk-monitoring management to ensure financial security and stability.

2. Formulate and issue Supporting Policies and Measures for the Software Service sector as soon as possible

Document No. 18, issued by the State Council (June 2000), which pertains to support the development of the software and IC sector, will expire by 2010. Mr. Guo Jianbin, the Deputy Director of the Software Service Department of the Ministry of Industry and Information Technology (MIIT), recently expressed that the department will formulate and release policies and measures encouraging the development of the software service sector as soon as possible. A revised Document No. 18 with relevant policies will be issued at the earliest convenience accordingly to the engaged departments and bureaus in the MIIT. The revised document will mainly cover the following:

- (i) Increasing corporate income tax break;
- (ii) Setting up of earmark supporting fund;
- (iii) Application of a preferential policy to new forms of software business such as information service and outsourcing.

We believe that the software industry supports the national economy in two ways: (i) The application of ICT in the industries is a measure to upgrade and consolidate the productivity of equipment manufacturing; and (ii) The vigorous development of the I.T. service will improve and pave the way for the service to coordinate the operational efficiency of the economy while creating jobs. Investors might wish to focus on the two aspects for opportunities.



3. Software and Service Industry in a new context amid the Financial Crisis

Since 2008, the American financial crisis has stirred up the global financial market, bringing considerable impact on the global software and service industry. The crisis has four characteristics cited below:

- (i) The global demand slows down;
- (ii) The service outsourcing market was affected to some extent. The I.T. expense of American financial industry was down by nearly 40%, Year over Year income growth rate was down by 30% plus in the outsourcing enterprises in India, the outsourcing market in Japan was down by more than 10%, and the software outsourcing growth rate in China was down to around half of last year's level;
- (iii) The growth rate of big enterprises falls;
- (iv) More investment and financing barriers are present for enterprises.

With the impact of the financial crisis, there will also be some adjustments and new opportunities for the development of the software and service industry as well: (i) New growth in open-source software; (ii) Promising E-commerce market for SMEs; (iii) Fast development of cloud-computing-based network service; and (iv) New opportunities from industrial consolidations.

The software and service industry is an important support of the economy, particularly during the depression through saving costs, improving efficiency, and integrating resources. Although this industry has been affected by the global financial crisis since the second half of 2008, the crisis brought more opportunities for structural shift and development. The revenue of the software and service industry in China maintains a high growth rate of 30% in 2008 indicating that the huge market in the country is buffering the impact from the global financial crisis to some extent. The domestic market, faster structural shift, and resource consolidation should propel the industry forward in a sound and fast manner, so that it could play a bigger supporting role in upgrading the quality of the national economy and changing its development mode.



4. More downward pressure on the Electronic Industry

In the beginning of December 2008, a symposium attended by the representatives of the key electronic enterprises was convened by the Operation Monitoring and Coordination Bureau of the MIIT. According to the representatives, the prospect for the electronic information industry in the coming two years is not very bright and the growth rate of major industries will suffer a continuous slowdown due to the strong linkage between the global financial crisis and the domestic market of China. Factors like the I.T. expense dropping faster amid further global economic downturn, the growing ripple effect from more layoffs and budget-cuts in multinational corporations, and the growing risk of a broken industrial chain due to the piling up of closed SMEs will exert a negative influence upon the industrial development and market sentiment. Based on the judgment of the representatives of the key enterprises and the analysis of international consultancy companies including the IDC, Gartner, iSuppli and Display Research, and others, the projections for the electronic information industry for this year, as well as the next are as follows:

- (i) Global I.T. expense is projected to reach 4-5% in 2008 and below 3% in 2009. Revenue growth rate of the electronic information industry in China is projected to be around 16% in 2008 and with correct efforts will reach 15% in 2009;
- (ii) Sales of color TV are projected to be down by approximately 10% globally in 2009; domestic market will fare better with an estimated sales growth rate of 5%;
- (iii) Computer sales are projected to reach a growth rate of 4% globally in 2008 and stay at the same level in 2009. Laptop computer sales will be up by 10% plus; domestic sales volume will be up by 20% in 2008 and 10% in 2009;
- (iv) Mobile phone sales are projected to grow by 4% globally; up by 5% domestically, and in 2009, sales will stay at the 2008 level;
- (v) Semiconductor revenue is projected to grow by 2% globally in 2008 with a possible negative growth of 5-6% in 2009. Sales volume is projected to grow by 5% domestically with the revenue up by 10% in 2008; sales in 2009 will stay at the same level with the revenue down by 2%;
- (vi) Software is projected to grow at 10% globally in 2008 while a lower growth rate is expected in 2009, falling by 2-4 percentage points. The domestic growth rate is projected to be 28% in 2008 and down to 20% in 2009.



5. Monetary Policy designed to maintain growth in 2009

The Work Conference of PBOC and the National Forex Management 2009, which ended in January 6, 2009 defines the term moderately easy monetary policy for the first time, as the policy aiming at the increasing the total volume of money and credit in a proper manner, keeping adequate liquidity in the banking system, and enabling a more active role of the monetary policy in stimulating economic growth while maintaining a stable price. It is clearly stated by the conference that the total money supply for 2009 is targeted at around 3-4 percentage points higher than the sum of the GDP growth rate and inflation, with M2 (broad money supply) up by approximately 17%. A combination of policy instruments such as interest rate, deposit-reserve ratio, and open market operations will be utilized to adjust the money supply and demand in a flexible manner. Innovative financial instruments can also be applied to maintain proper liquidity in the market, if necessary. It was stressed in the conference that consumer lending should be encouraged properly, relevant lending policies and measures formulated and implemented, specific growing aspects in consumer lending sector nurtured and strengthened, and the initiatives of the citizens to improve housing supported. Before the conference, additional growth in lending was estimated to be above RMB4.6 trillion yuan in 2009. In addition, it was stated in the conference that we should fully engage credit issuance, direct financing and civil financing, strongly support capital market, stabilize stock market operation, increase bond issuance, encourage equity investment, and facilitate the expansion of direct financing channels.

6. Notification of Project Application under the Key and Special Projects in Critical Electronic Device, High-end Generic Chip, and Fundamental Software Product and the related guidelines issued by the Ministry of Industry and Information Technology and the Ministry of Science and Technology

Notification of Project Application under the Key and Special Projects in Critical Electronic Device, High-end Generic Chip and Fundamental Software Product was released by the Administration Office for the Implementation of Key and Special Projects in Critical Electronic Device, High-end Generic Chip, and Fundamental Software Product on November 10, 2008. In order to improve the independent innovation ability to master critical technology and upgrade our technical level in relevant fields, we hereby release the guidelines for project application for the year 2009 under the Key and Special Projects in Critical Electronic Device, High-end Generic Chip, and Fundamental Software Product in line with relevant implementation requirements.



The above mentioned guidelines cover the following areas and specific projects for application:

Area	Category	Topic of Project
High-end Generic chip	1. Safe SoC	1-1 : High-security E-ID card, reading and writing device chips
	2. Multi-core CPU for high performance server	2-1 : Research on the structure of a new type processor
	3. Safe and applicable computer CPU	3-1 : Research and application of safe and applicable computer CPU
		3-2 : Research on the key technology of a new type of heterogeneous multi-core CPU for 3C convergence application
	4. High performance embedded CPU	4-1: Research and industrial application of self-developed high performance embedded CPU
		4-2 : Next-generation high performance embedded CPU
		4-3 : Intellectual property rights analysis and evaluation for high-end general chip
	5. Personal mobile information terminal SoC	5-1 : Research and application of the personal mobile information terminal SoC
		5-2 : Adaptive multi-mode multi-RF chip
		5-3 : Research in Digital assistant RF, power integration technology
	6. Storage control SoC and mobile storage chip	6-1 : Mobile storage chip
		6-2 : Smart mobile storage control SoC
		6-3 : Massive memory SIM chip
	7. Digital TV SoC	7-1 : Digital TV SoC
		7-2 : Mobile TV SoC
		7-3 : Next-generation coaxial-cable broadband access chipset
		7-4 : Digital family SoC development and industrial application
	8. High performance IP core technology	8-1 : High performance low power consumption embedded DSP
		A. Embedded DSP for high density computing application
		B. High performance low power consumption embedded DSP for terminal applications
		8-2 : High performance critical IP core
		A. Embedded high speed, high bit digital to analog and analog to digital conversion IP core
		B. Embedded multi-mode, multi frequency radio transceiver IP core
		C. Embedded high-density storage IP core
		D. Embedded PLA IP core
		E. High-speed serial interface IP core
	9. EDA tool development	9-1: Pilot platform for EDA tool application and SoC design methodology research



Area	Category	Topic of Project
Fundamental Software Product	1. High-credibility server operating system	1-1 : R&D and industrial application of server operating system
		1-2 : Compiling system and tool chain supporting domestic CPU
		1-3 : Reference implementation of domestic operating system
	2. Safe and easy desktop operating system	2-1 : R&D and industrial application of desktop operating system
		2-2 : Multi-zone safe desktop operating system
		2-3 : Firmware supporting domestic computer
	3. Real-time control embedded operating system	3-1 : Real-time embedded operating system and development environment
		3-2 : R&D and industrial application of embedded software platform of automobile electronic controller
	4. Embedded operating system for network service	4-1 : Network operating system for new-type network application model
		4-2 : R&D and industrial application of embedded software platform for smart phone
		4-3 : R&D and industrial application for embedded software platform for digital TV
	5. Large universal database management system (DBMS)	5-1 : R&D and industrial application of large universal DBMS and matched kit
		5-2 : Unstructured data management system
	6. Middleware of network application service	6-1 : Reference for implementation and platform of domestic middleware
		6-2 : R&D and industrial application of integrated middleware set
		6-3 : R&D and industrialization of domain-oriented application platform
	7. Office and word processing software	7-1 : R&D and industrial application of integrated network OA software
	8. Key ICT application of basic software	8-1 : Key application pilot project of basic domestic software
		8-2 : IPR strategy, ability, and service of basic software
		8-3 : Testing and evaluation of universal basic software
		8-4 : Testing of integrated domestic software application

7. The Catalogue of Advantaged Industries for Foreign Investment in the Central-Western Region (Amended in 2008) promulgated by the National Development and Reform Committee

On December 23, 2008, Decree No.4 of the National Development and Reform Committee (NDRC) and Ministry of Commerce (MOFCOM) stated that *The Catalogue of Advantaged Industries for Foreign Investment in the Central-Western Region (Amended in 2008)* as approved by the State Council is hereby promulgated. It shall be enforced starting January 1, 2009. The *Catalogue of Advantaged Industries for Foreign Investment in the Central-Western Region (Amended in 2004)* promulgated in July 2004 (Decree No. 13 of the NDRC and MOFCOM of 2004) and the *Catalogue of Advantaged Industries for Foreign Investment in Liaoning Province* promulgated in September 2006 (Decree No. 47 of the NDRC and MOFCOM of 2006) shall be repealed simultaneously. According to the *Provisions on Guiding the Orientation of Foreign Investment* (Decree No. 346 of the State Council), foreign-invested projects that fall within the Catalogue herein may enjoy the preferential policies for foreign-invested projects under the category of encouragement. Foreign-invested projects under the category construction may be executed in line with the provisions of the Catalogue and in accordance with relevant policies herein.



8. Guidelines for the Application for Key Projects in Research and Development (R&D) and Pilot Applications of UWB Wireless Communication System under the 863 Program issued by the Ministry of Science and Technology

The guidelines of the application for the key projects in R&D and pilot application of UWB wireless communication system in the information technology field under the national hi-tech R&D program (863 Program) was released officially in the last ten days of October 2008.

As a new communication technology emerged at the beginning of this century, UWB will be one of the main methods for Near Field Communication (NFC) with promising applications and market potentials. Continuous support through the 863 program for 7 years will help us achieve significant progress in the R&D of key technologies of UWB wireless communication, enabling a fledgling R&D ability in developing chip, software, and application system. The technology for the systematic R&D and application innovations specific for industrial demand is also available.

Through the program, we aim to achieve breakthroughs in key technologies including the high-speed wireless transmission via carrier modulation and pulsed mode, low cost and low power consumption chip design, and network building so as to produce a testing and validating system based on an independently developed chip. In addition, we intend to expand the application of UWB wireless communication technology, encourage technology application in industries, and nurture the new scale growth in the I.T. field. The aims of the program are listed below:

- (i) Achieve breakthroughs in the key technology of high-speed wireless transmission carrier modulation and pulsed mode and network building, propose a well-rounded UWB wireless communication regime, and develop a universal solution platform of UWB based on the independently developed chip and low-cost wireless node to build a testing and validating network environment;
- (ii) Promote the UWB wireless communication practice through application innovations so as to realize pilot applications including the in-door UWB wireless connection, UWB wireless LAN, UWB through-wall testing/integrated communication system, and other systems;
- (iii) Expand the application of the UWB wireless communication technology through a forum, industrial alliance, or other forms; set up relevant standards, encourage technology application in industries, and nurture a new scale growth in the I.T. area.



9. Notification on Relevant Matters on Organization and Implementation of the Special Program on Information Security 2009 by the General Office of National Development and Reform Committee

In order to fully implement the work deployed in *Opinions on Strengthening Information Security Work by the Information Work Leading Group of the Nation* (Z.B.F 2003 No.27) and *the National 11th 5-Year Plan on Information Security* (G.X.A 2007 No.2), promote national competitiveness in the information security industry, strengthen independent controlling ability on information system, and secure a healthy and fast development of the national economy and ICT application for the society, the NDRC has decided to organize and carry out the Special Program on Information Security 2009. Important items in this program include optimizing industrial structure, improving product performance and function, nurturing professional service, promoting standardization, supporting backbone enterprises, and upgrading industrial competitiveness and independent controlling ability in critical information systems, the focus of the program falls on the following aspects:

- (i) Industrial application of information security products that support the national ICT application and national information security infrastructure
 - a. Focus on the security application products based on a domestic creditable computing chip and the industrial application of an integrated high performance application product based on an independently developed cryptographic technology;
 - b. Focus on products like secured management of mobile storage, malicious code control, E-file security management, on-line digital IPR protection, evidence collection from electronic data, security and confidential examination, and similar products. Focus on safety and security products for computers like the mobile terminal and desktop terminal, industrial application of security management, and applications for wireless network;
 - c. Focus on the industrial application of such products as safe operating system, safe middleware, safe server, safe access equipment, safe storage, backup for disaster recovery, and safe OA software;
 - d. Focus on the industrial application of a high performance application specific safe chip and equipment, integrated products with high performance, and multi-security function for the next-generation network.



- (ii) Professional service in information security for the fundamental information network and important information systems

Focus on media-based data recovery, backup for disaster recovery, and emergency response towards national information infrastructure and important information systems like finance, electricity, and transportation systems. Focus on security testing, assessment, and examination which support the national information security monitoring policy, information release, and consultancy for information security related incident. Focus on custodian service for monitoring and managing security status of information system.

- (iii) Security standards system for the national E-government development and key standards for the important information security products

Focus on the R&D of key standards for the national E-government development and important information security products, which are related with information security rank protection, risk evaluation, and security for information system which in turn is related with national secrecy, emergency response, and disaster recovery backup and security service.

- (iv) Pilot program of information system adopting independently developed information equipment

In key areas like E-government, banking, securities, electricity, and electricity grid, the focus is on the building of a pilot program of information system in line with information security rank protection and adopting independently developed equipment, so as to hasten the wider application of independently developed products in important information systems and accumulate experiences for upgrading the security function of important information systems.



APPENDIX A

DISCUSSION GUIDE – FREIGHT FORWARDING

Background Information

- Company Name, job title and/or department
- Size of Company – No. of staff in Hong Kong, Mainland China and Overseas
- No. of I.T. staff in Hong Kong, Mainland China and Overseas
- Year of Establishment
- Service Coverage
 - a. Air-freight
 - b. Sea-freight (LCL/FCL/Non Containerized Load/Buyer Consolidation)
 - c. Sea-Air
 - d. Warehouse and Distribution
 - e. Contract Logistics
 - f. Customs Clearance and Brokerage
 - g. Cargo Marine Insurance
 - h. Rail-Cargo
 - i. Lead Logistics (4PL)
 - j. Fair & Exhibition/Home Removal
 - k. Others
- Cargo Handling Capability
 - a. Dangerous Cargo
 - b. Reefer Cargo & Perishable Goods
 - c. Temperature Controlled Cargo (e.g. Beverage)
- Core Industry Sectors:
 - a. Industrial
 - b. Life Sciences/Healthcare
 - c. Retail
 - d. Consumer (FMCG)
 - e. Fashion/Apparel
 - f. Aerospace/Automotive
 - g. Hi-Tech
 - h. Others (e.g. Oil and Gas)
- Accreditation:
 - a. TAPA
 - b. ISO9002
 - c. C-TPAT
 - d. Others, please specify

Section A:

Current I.T. Application Level in Business & Operation Process

In this section, we ask participants how they typically do their business to identify information flow and technology needs derived from their business and operation process.

A generic work flow diagram applicable for the industry sector being studied

- Does the company operate any “Freight Management System” (or Operation Management System)?
 - ♦ If YES, please advise whether it’s a self-developed system and how long does it take for such development?
 - ♦ If it’s purchased from a technology provider, how much does it cost? And the maintenance fee incurred?
 - ♦ How satisfied are you with the current system? (1 = Less satisfied; 5 = Most satisfied)
- Does your FMS/OPMS provide the function of: CRM, Reporting, Data Analysis, Load Planning?
- Have you integrated your FMS/OPMS with external stakeholders, e.g. airlines, ocean carriers, DTTN/Tradelink, shippers or consignees)?
 - ♦ If YES, please describe the detailed integration.
 - ♦ If it’s just for internal use, what kind of the internal systems are being integrated with? (Accounting/Finance, Sales/Marketing, Warehouse Management ...etc)
- Does your company support the system with BI (Business Intelligence) features in providing the analytical reporting function, alert management, shipment trends, ABC analysis in sorting out the top tier accounts?
- What are the key channels of communication that your company used to receive bookings? (e.g. Fax/E-mail with Excel file/Phone Call/Web-Portal/EDI/RosettaNet/XML or others)
 - ♦ Please advise the distribution of the above channels in terms of percentage.
 - ♦ Upon receipt of booking, do you have any acknowledgement of receipt with SO number to the shippers? If so, please advise the channels of communication (through phone call/E-mail/return fax/SMS or others) and the distribution as well.



APPENDIX A

DISCUSSION GUIDE – FREIGHT FORWARDING

- How does your company send bookings to airlines and ocean carriers? (e.g. portal, fax or other ways)?
 - ♦ Do the airlines/ocean carriers send your company space/order confirmation upon receipt of your booking? And what are the channels of communication?
- Have you encountered any challenges in the booking procedures?
- Does your company spend plenty of resource on data entry? If so, does your company fully unitize the raw data for airway bills/bill of lading and commercial document preparation? How does your company overcome this challenge? What is the level of human error in data entry in terms of %?
- Do the airlines/ocean carriers provide your company with sufficient information? Is it real time information? For example: the cargo offload, space availability, schedule delay, special offering? If so, please advise the channels of communication? What kind of extra information that you are looking for from the airlines? How useful of this information to your business and operation process? And why?
- Any systems to monitor the vendor performance such as airline, ocean carrier, trucker, warehouse provider, trucker and sub-contractor? (In providing the KPI analysis, historical records for the shipment delay, damage, lost) Is it useful? Does your company think that the tool in selecting the optimized vendors based on the pre-set criteria in considering their past performance, costs, service readiness?
- Any systems equipped with interface with terminals (AAT/Hactl/HIT/MTL/OnePort)? If not, any portals your company is using (Traxon, Ezycargo, One Port, GT Nexus, INTTRA)? What is the major function of these systems/portals? How useful? What kinds of function need to be improved?
- While cargo/container delivering to the terminal, any document signed back to your company? Does your company accept e-receipt?
 - Would you mind sharing your experience in using One-Port to retrieve the e-Mate receipt? (for ocean)
- Any additional information does your company expect from the terminal? Such as the status of the cargo/container.
- While preparing the cargo load plan/ container load plan, does your company utilize any application or technology such as cargo load optimizer, cargo optimization system to facilitate the planning? If not, why? In current, does your company only make use of human expertise? How's the effectiveness? Does it achieve your request?
- Does your company think that the system in calculating the actual cost allocation on each kg/CBM useful? (Case elaboration: The DDU air shipment pickup from Dongguan by consolidation truck via HKG gateway to L.A. This involves truck cost, fuel surcharge, air-freight, customs brokerage, documentation, terminal charge, CFS...etc)
- Does your company think that the route optimizer can enhance your carrier, routing selection in multi-model and region hub operation?
- For the cargo optimization and improving the profitability, occasionally operation department demands the heavy load cargo or light weight cargo for balancing palletization. Is it supportive if the system can provide the historical record of the goods description and nature and filter the customer information? According to the immediate information, the sales/customer service takes action to solicit the cargo by special offering. (for air only)
- Is the system of container load plan useful for you? If not, why? (for ocean)
- Any issues in preparing e-manifest, customs declaration? Is it time consuming? Currently how to manage it? What kinds of technology or system to adopt in this area?
- Any warehouse management systems available (CFS warehouse/Air-freight Fast Moving warehouse)? If so, is it self-developed or purchased from the technology provider? If not, does your company think that there is no such demand?



APPENDIX A

DISCUSSION GUIDE – FREIGHT FORWARDING

- How to avoid mis-handling - cross labeling, cargo mix-up, cargo miss- loading?
- How to locate your cargo or shipment? By manual record or by system? Is it necessary to have a system to locate the cargo location?
- Any systems available for monitoring the cargo unloading and loading process? By CCTV or other technologies? If not available, how to ensure the security and enhance the visibility?
- Does your company manage your own trucks? Or it's out-sourced to a trucking company?
- Any GPS or monitoring system to track the truck/trailer activities? If so, how many truck installed with those technologies? Is it a mandatory? Does your company know the technology of e-seal/smart container?
- While the cargo picked up from the terminal, in case of abnormal case occurred such as cargo damage found, wet...etc? Any potential needs in taking the photos and recording down the status in where the information given to the operation department and the consignee is for decision making on survey arrangement. (for air) Any other critical challenges?
- How to handle the container damaged in the process of the empty container collection and heavy loaded container collection? Any concerns and issues?
- Are the sales easy to view their sale performance in term of target, tonnage, revenue, and the numbers of new accounts...etc?
- Is it necessary to monitor the sales daily activities? By mobile technology?

- Any channels for the customer to respond the issues of price, performance...etc? This will help the company in continuous improvement?
- As for the DSO and credit limit issues, any alert systems available to notify the sales or operation for the shipment control? Is it useful?
- In the track and trace function, how's close to the real time? Is it necessary to be real time? Any plan to enhance this competence?
- Any cargo security concern and issue along the supply chain?

Show a multiple choice sheet for participant's selection

- Please click the following most describing your current I.T. application.
 - ◆ Totally manual, no hardware and software
 - ◆ No knowledge and awareness of I.T. application. The company has no I.T. solution to solve for daily operating issues (except MS Office, public email account, etc.)
 - ◆ Have knowledge and awareness of I.T. application but don't use any I.T. solution (except MS Office, public email account, etc.)
 - ◆ Apply limited I.T. solution to automate a specific area of operations (e.g. document management system, warehousing system but not full ERP, finance & accounting system only, etc.)
 - ◆ Full I.T. implementation with an integration with other internal systems
 - ◆ Full I.T. implementation with an integration with both internal and external systems



APPENDIX A

DISCUSSION GUIDE – FREIGHT FORWARDING

Section B:

I.T. Application Barriers & Concerns

In this section, we ask participants what are their concerns and difficulties to apply I.T. solutions.

- What is the biggest challenge your company faces with technology adoption?
Please rate the selected items in terms of the degree of challenge.
(1 = Less challenging; 5 = Most challenging)
 - ♦ data integration
 - ♦ limited budget
 - ♦ difficult to assess ROI
 - ♦ difficult to cope with rapid technological changes
 - ♦ shortage of skilled I.T. people
 - ♦ user's recognition on application value is low
 - ♦ lack of industry/government support
 - ♦ complexity of application software
 - ♦ difficult to cope with rapid and vary customer expectation
 - ♦ other (please specify)
- When deciding to enhance or upgrade your technological capabilities and customer offering, what are the most important motivating factors?
Please rate the selected items in terms of the degree of importance.
(1 = Less important; 5 = Most important)
 - ♦ improve operational efficiency
 - ♦ increase service performance
 - ♦ improve customer satisfaction
 - ♦ increase company profitability
 - ♦ differentiate themselves from competitors
 - ♦ build up long-term relationship
 - ♦ clear ROI
 - ♦ reduce human error
 - ♦ corporate image
 - ♦ other (please specify)
- Please rank the following concern areas on an I.T. application:
 - ♦ Price
 - ♦ People
 - ♦ Technology
 - ♦ Time
 - ♦ Solution Providers' Capabilities

Section C:

Industry Trends/Characteristics

In this section, we ask participants how their industry characteristics will affect their technology application needs in the future.

- What are some hot issues/trends of third party logistics provider now? (Threats, opportunities, new customer's requirements, etc.)
 - ♦ How would you see the impact of the increased fuel service charge nowadays?
 - ♦ Do you agree that I.T. capability is a critical competitive factor in this industry?
- Do you foresee any micro/macro trends that are going to impact your industry in the future? Such as airline alliance and the termination of ocean carrier alliance, Global M&A,
- How is this transformation going to affect your business process? Such as financial tsunami, Three Links, new China labor law, manufactories removal, the change of operation in China – processing trade to domestic trade and self-investment
- Do they incur any implications on your technology application needs? Such as Wal-Mart mandatory in using RFID, wireless Technologies, Web-Based Technologies...etc. If so, what are they and why?



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Section D:

Future I.T. Applications

In this section, we ask the participants about their expectation the needs of I.T. application, we would then discuss with them about how our centre would be able to develop the solution

- In coping with the severe competition, what kinds of I.T. solutions your company plans to implement? If NO, why?
- What business applications and how you will automate them with technology in future?
 - ♦ Customer relationship
 - ♦ Purchasing/Supplier relationship
 - ♦ Transportation process
 - ♦ Add-value activities
 - ♦ Warehousing & Distribution
 - ♦ Communication with internal & external parties (e.g. Portal Technology and Electronic Document Exchange)
 - ♦ Supply chain track & trace
 - ♦ Supply chain security
 - ♦ Compliance management
 - ♦ Forecasting/Event Management
 - ♦ Business Intelligence
 - ♦ Others (Please Specify)
- What do you expect the % of the total cost in your I.T. adoption?
- What is your current spending (in terms of % and/or absolute amount)?
- What is your view on those initiatives/ technologies?
 - a. RFID
 - b. Wireless Application such as WiFi Network
 - c. e-Documentation such as eFCR
 - d. Business/Operation Intelligence
 - e. SaaS

Section E:

R&D Demand & Aspiration

In this section, we ask participant what industry/government support are needed in I.T. adoption

- Do you have any expectation for government/R&D Centre in helping the industry in term of short-term & long-term?

Show LSCM's 2008 R&D Roadmap for participant to comment

- In which areas of LSCM R&D roadmap are you interested in? And what other key technology initiatives would your company be interested?
- Are you interested in participating in R&D projects if such R&D project can resolve your business problems and improve your company competitiveness?
- If government is willing to support 90% over the total cost of such R&D project, are you willing to invest together with other companies within the industry the remaining amount and share the project deliverables? Can you think about the possible themes/ topics for such joint R&D project?
- If government is willing to support 50% over the total cost of such R&D project, are you interested to invest the remaining amount and own the IP rights of the project deliverables?
- Do you think the function and long-term goal of the LSCM R&D Centre contributes to strengthening Hong Kong's economic competitiveness? If not, why?



APPENDIX B

ORIGINAL TEXT OF “POLICY OF CHINA RFID INDUSTRY DEVELOPMENT”

中国RFID产业发展政策

原文：中国RFID产业联盟

(一) 国务院研究部署金融促经济发展 政策措施

2008年12月3日，国务院总理温家宝主持召开国务院常务会议，研究部署当前金融促进经济发展的政策措施。会议研究确定了金融促进经济发展的政策措施。

- (1) 落实适度宽松的货币政策，促进货币信贷稳定增长；
- (2) 加强和改进信贷服务，满足资金合理需求；
- (3) 加快建设多层次资本市场体系，发挥市场的资源配置动能；
- (4) 发挥保险的保障和融资功能，促进经济社会稳定运行；
- (5) 创新融资方式，拓宽企业融资渠道；
- (6) 改进外汇管理，大力推动市场投资便利化；
- (7) 加快金融服务现代化，全面提高金融服务水平；
- (8) 加大财税改革支持力度；
- (9) 深化金融改革，完善监管体系，强化风险监测管理，切实保护金融安全稳定。

(二) 尽快制定出台鼓励软件服务业发 展政策措施

国务院支持软件与集成电路产业发展的18号文件（2000年6月颁布）将于2010年到期。据工业和信息化部软件服务业司副司长郭建兵近日表示，工信部软件司将尽快制定和出台鼓励软件服务业发展的政策措施。工信部相关业务司局介绍：“新18号文”相关政策将尽快出台。主要包括：

- (1) 加大对企业的所得税优惠；
- (2) 设立专项扶持基金；
- (3) 优惠政策将涵盖软件新业态，如：信息服务与外包等。

我们认为，软件产业（企业）对国民经济的支撑作用主要体现在两方面：一、以信息化带动工业化，提升整理装备制造业的生产效率；二、大力发展IT服务，提升整理经济运作效率，同时解决一部分社会就业需求。对于投资者而言，应该重点关注这两方面的投资机会。

(三) 金融危机下软件与服务业发展面 临新格局

2008年以来，美国金融危机导致世界金融市场动荡，也对全球软件与服务业带来较大冲击。主要表现为以下四个特征：

- (1) 全球市场需求放缓；
- (2) 服务外包市场有所萎缩。美国金融行业缩减IT支出近40%，印度服务外包企业收入增速同比减少30%以上，日本服务外包市场下降了10%以上，我国软件外包出口增速降为去年一半左右；
- (3) 大公司业绩增长出现下滑；
- (4) 企业投融资难度加大。

软件与服务业受金融危机冲击的同时，也出现一些调整变化和新的发展机遇；一是开源软件面临新的增长，二是中小企业电子商务市场看好，三是基于云计算的网络服务模式加快发展，四是行业整合出现新的机会。

软件与服务业是提升经济质量的重要支撑，在经济不景气时更能体现其节约成本、提高效率和整合资源的作用，因此，尽管自2008年下半年来世界金融危机对软件与服务业形成一定冲击，但更多带来的是新的结构调整与发展机遇。我国软件与服务业务收入08年依然保持30%的高速增长，说明我国软件服务和信息化市场很大，在一定程度上减缓了国际金融危机的冲击。依托国内市场，加快结构调整和资源整合，推动产业又好又快发展，为提升国民经济质量和转变发展方式发挥更大的支撑作用。



APPENDIX B

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(四) 电子行业增速下行压力加大

2008年12月初,工业和信息化部运行监测协调局召开重点电子企业座谈会。从企业反映的情况看,由于世界金融危机对国内市场的联动效益日益显现,今明两年电子信息产业形势不容乐观,主要行业增速将出现连续下滑。全球经济进一步放缓,IT支出加速下滑;跨国公司裁员减支力度加大,日益波及国内企业;中小企业倒闭数量增多,产业链断裂风险加大,都将对产业发展和市场信心带来一连串负面影响。根据重点企业的判断,结合IDC、Gartner、iSuppli、Display Research等国际市场咨询机构的分析,今明两年电子信息产业形势预测如下:

- (1) 全球IT支出,预计08年达到4-5%的水平,09年降至3%以下。08年国内电子信息产业收入增速预计为16%左右,09年争取达到15%的水平;
- (2) 彩电,预计全球09年出现负增长,降幅约为10%;国内市场相对较好,09年销量增速预计为5%;
- (3) 计算机,预计08年全球增长4%,09年持平,其中笔记本电脑增长10%以上;08年国内市场销量预计增长20%,09年增长10%。
- (4) 手机,预计08年全球增长4%;国内市场增长5%,09年与今年持平。
- (5) 半导体,预计08年全球收入增长2%,09年可能出现负增长,降幅为5-6%。预计08年国内市场销售量增长5%,收入增长10%;09年销量持平,收入下降2%。
- (6) 软件,预计08年全球增速10%,09年增速可能下降2-4个百分点。08年国内增速为28%,09年降至20%。

(五) 2009年货币政策要服务于“保增长”

2009年元月6日闭幕的“2009年中国人民银行工作会议暨全国外汇管理工作会议”首次就“适度宽松货币政策”进行了定义。会议指出:“实施适度宽松的货币政策,就是要在保持物价稳定的同时,适当增加货币、信贷投放总量,保持银行体系有比较充足的流动性,使货币政策在促进经济增长方面发挥更加积极的作用。”会议明确,2009年以高于GDP增长与物价上涨之和约3—4个百分点的增长幅度作为全年货币供应总量目标,争取广义货币供应量M2增长17%左右。将综合运用利率、存款准备金率、公开市场操作等政策工具灵活调节资金供求,必要时还可以使用创新金融工具保持市场的合理流动性。会议强调,要鼓励合理发展消费信贷,落实和制定有关信贷政策措施,有针对性地培育和巩固消费信贷增长点,支持居民解决和改善住房条件。此前,有分析认为,2009年的新增信贷规模约在4.6万亿元人民币以上。会议提出,要充分发挥信贷投放、直接融资和民间金融的作用,要大力支持资本市场发展,稳定股票市场运行,扩大债券发行规模,鼓励股本性投资,创造条件有效拓展直接融资渠道。



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(六) 工业和信息化部、科技部发布《关于“核心电子器件、高端通用芯片及基础软件产品”科技重大专项2009年课题申报的通知》及申报指南

2008年11月10日,“核高基重大专项实施管理办公室”发布《关于“核心电子器件、高端通用芯片及基础软件产品”科技重大专项2009年课题申报的通知》。为提高自主创新能力,掌握核心技术,提升我国相关领域的技术水平,根据“核心电子器件、高端通用芯片及基础软件产品”科技重大专项实施的有关要求,现发布核高基重大专项2009年课题申报指南。

核高基2009年课题申报指南中,指出课题申报方向和具体项目如下表所示:

项目方向	项目名称	课题名称
高端通用芯片方向	1、安全SoC芯片	1-1:高安全电子证卡及读写机具芯片
	2、高性能服务器多核CPU	2-1:新型处理器结构研究
	3、安全适用计算机CPU	3-1:安全适用计算机CPU研发与应用
		3-2:面向3C融合应用的新型异构多核CPU关键技术研究
	4、高性能嵌入式CPU	4-1:自主知识产权高性能嵌入式CPU的研发及产业化
		4-2:下一代高性能嵌入式CPU
		4-3:高端通用芯片知识产权分析与评估
	5、个人移动信息终端SoC芯片	5-1:个人移动信息终端SoC芯片研发与应用
		5-2:自适应多模多频射频芯片
		5-3:数字辅助射频、功率集成技术研究
	6、存储控制SoC与移动存储芯片	6-1:移动存储芯片
		6-2:智能移动存储控制SoC芯片
		6-3:大容量SIM卡芯片
	7、数字电视SoC芯片	7-1:数字电视SoC芯片
		7-2:移动电视SoC芯片
		7-3:新一代同轴电缆宽带接入套片
		7-4:数字家庭SoC芯片开发及产业化
	8、高性能IP核技术	8-1:高性能低功耗嵌入式DSP
		A、面向高计算密集度应用的嵌入式DSP
		B、面向终端应用的高性能、低功耗嵌入式DSP
		8-2:高性能关键IP核
		A、嵌入式高速、高位数/模和模/数转换IP核
		B、嵌入式多模、多频无线收发器IP核
		C、嵌入式高密度存储器IP核
		D、嵌入式可编程逻辑阵列IP核
		E、高速串行接口IP核
	9、EDA工具开发	9-1:EDA工具应用示范平台建设与SoC设计方法学研究



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项目方向	项目名称	课题名称
基础软件产品方向	1、高可信服务器操作系统	1-1: 服务器操作系统研发及产业化
		1-2: 支持国产CPU的编译系统及工具链
		1-3: 国产操作系统参考实现
	2、安全易用桌面操作系统	2-1: 桌面操作系统研发及产业化
		2-2: 多域安全桌面操作系统
		2-3: 支持国产计算机的固件软件
	3、实时控制类嵌入式操作系统	3-1: 实时嵌入式操作系统及开发环境
		3-2: 汽车电子控制器嵌入式软件平台研发及产业化
	4、网络业务类嵌入式操作系统	4-1: 面向新型网络应用模式的网络化操作系统
		4-2: 智能手机嵌入式软件平台研发及产业化
		4-3: 数字电视嵌入式软件平台研发及产业化
	5、大型通用数据库管理系统	5-1: 大型通用数据库管理系统与套件研发及产业化
		5-2: 非结构化数据管理系统
	6、网络应用服务中间件	6-1: 国产中间件参考实现及平台
		6-2: 集成化中间件套件产品研发及产业化
		6-3: 面向领域的应用平台研发及产业化
	7、办公与文档处理软件	7-1: 网络集成办公软件研发及产业化
	8、基础软件重大信息化应用	8-1: 国产基础软件重大应用示范
		8-2: 基础软件知识产权策略、能力与服务
		8-3: 通用基础软件测试评估
		8-4: 国产基础软件集成应用测试

(七) 国家发改委发布《中西部地区外商投资优势产业目录（2008年修订）》

2008年12月23日，国家发展和改革委员会、商务部联合颁布4号令：“《中西部地区外商投资优势产业目录（2008年修订）》已经国务院批准，现予以发布，自2009年1月1日起施行。2004年7月发布施行的《中西部地区外商投资优势产业目录（2004年修订）》（国家发展改革委、商务部令2004年第13号）和2006年9月发布施行的《辽宁省外商投资优势产业目录》（国家发展改革委、商务部令2006年第47号）同时废止。根据《指导外商投资方向规定》（国务院令第346号）的规定，属于本目录的外商投资项目，享受鼓励类外商投资项目优惠政策。符合本目录规定的外商投资在建项目，可按照本目录的有关政策执行。”

(八) 科技部“863计划”发布“超宽带无线通信系统研发与应用示范”重点项目申请指南

国家高技术研究发展计划（863计划）信息技术领域“超宽带无线通信系统研发与应用示范”重点项目申请指南于2008年10月下旬正式发布。

超宽带（UWB）无线通信技术是本世纪初发展的新型通信技术，将是未来短距离无线互联的主要手段之一，具有广阔的应用领域和市场前景。在国家863计划长达7年的持续支持下，我国在超宽带无线通信关键技术研发方面已经取得了重要进展，初步形成了芯片、软件和应用系统的开发能力，具备了针对行业需求开展系统级研发和应用创新的技术条件。



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拟通过本项目的支持，突破载波调制与脉冲模式高速无线传输技术、以及低成本、低功耗芯片设计与组网等关键技术，研制出基于自主芯片的试验与验证系统，推广UWB无线通信技术的应用范围，促进技术向产业转移，培育我国信息技术领域新的规模性增长点。项目研究目标：

- (1) 突破载波调制与脉冲模式高速无线传输与组网关键技术，提出完整的UWB无线通信体制，研制出基于自主研发芯片的UWB共性解决方案平台，以及低成本无线节点，搭建出组网试验验证环境；
- (2) 通过应用创新，促进UWB无线通信技术的实用化，实现UWB室内无线互联、UWB无线体域网、UWB穿墙检测/通信综合系统等应用示范；
- (3) 通过论坛、产业联盟等形式，推广UWB无线通信技术的应用范围，建立相关标准，促进技术向产业转移，培育我国信息技术领域新的规模性增长点。

(九) 国家发改委发布《国家发展改革委办公厅关于组织实施2009年信息安全专项有关事项的通知》

为了贯彻落实《国家信息化领导小组关于加强信息安全保障工作的意见》（中办发[2003]27号）和《国家信息安全“十一五”规划》（国信安[2007]2号）的工作部署，进一步提高我国信息安全产业的竞争力，提升信息安全专业化服务水平，增强信息系统的自主可控能力，保障国民经济和社会信息化的健康快速发展，国家发展改革委决定组织实施2009年信息安全专项。该专项的重要事项包括优化产业结构，提高完善产品性能和功能，培育专业化服务，推动标准化建设，扶持骨干重点企业，提升产业竞争力，以及重要信息系统自主可控能力的指导原则，重点支持：

- (1) 为国家信息化建设及国家信息安全基础设施提供支撑的信息安全产品产业化

1. 重点支持基于国产可信计算芯片的安全应用产品，以及基于自主密码技术的高性能集成应用产品的产业化；
2. 重点支持移动存储介质保密管理、恶意代码防治、电子文档安全管理、网络数字版权保护、电子数据取证、安全保密检查等产品，移动终端、桌面终端安全防护等计算机安全保护产品，以及面向无线网络的安全管理与安全应用产品的产业化；
3. 重点支持安全操作系统、安全数据库、安全中间件、安全服务器、安全接入设备、安全存储、容灾备份软件、安全办公软件等产品的产业化；
4. 重点支持高性能专用安全芯片和专用安全设备，以及适用于新一代网络环境的具有高性能、多安全功能的软硬件集成化产品的产业化。

- (2) 为基础信息网络和重要信息系统安全运行提供技术支持的信息安全专业化服务

重点支持基于介质的数据恢复，容灾备份，面向国家信息基础设施和金融、电力、交通等重要信息系统的应急响应，支撑国家信息安全监管政策的安全测评与检查，针对信息安全事件的信息发布与咨询，以及包括对信息系统安全监控管理的托管服务。

- (3) 面向国家电子政务建设的安全标准体系及重要信息安全产品的关键标准

重点支持面向国家电子政务建设和重要信息安全产品的，有关信息安全等级保护、风险评估、涉密信息系统安全保密、应急与灾备、安全服务等方面的关键标准研究。

- (4) 采用自主信息化装备的信息系统示范工程

在电子政务和银行、证券、电力、电网等重要领域，重点支持采用自主信息化装备，按照信息安全等级保护要求组织建设的信息系统示范工程，以加快推进我国自主产品在重要信息系统中的广泛应用，为提升我国重要信息系统的安全保障能力积累经验。



APPENDIX C

READER OPINION FORM

Thank you for reading the LSCM Market Intelligence Report. In order to improve the quality of the report and its value to the industry, we invite you to complete this reader opinion form.

1. How do you find the report comprehensive and useful? Does it reflect industry problems and technology needs?

2. Does the report contain sufficient detail? What other contents you would like to include in the report?

3. Which parts of the report are the most useful to your work?

4. How does the information in this report impact on your views of enabling technologies?

5. What improvements can be made to this report?

6. Do you have any other comments or suggestions?

7. Would you recommend your colleagues/partners reading this report?

8. Contact Information *(Optional)*

Name Ir Prof Dr Mr Mrs Ms

Company

Phone Number

Email

Thank you for your feedback. Please return the completed form by fax: (852) 2299 0552 or email to klam@lscm.hk.



APPENDIX D

MEMBERSHIP APPLICATION FORM



Act Now!

Apply Centre Membership
on or before
31 March 2010 to enjoy
Annual Membership
Fee Waiver!

Centre Membership Scheme

Promotional Terms and Conditions:

1. The promotional period is between 1 April 2009 and 31 March 2010 inclusive (the "Promotional Period").
2. Applicant is required to submit the completed application form via mail or online channel together with all supporting documents within the Promotional Period. A notification letter will be sent to the successful applicant by mail.
3. Membership application is subject to the LSCM R&D Centre's usual membership approval procedure.
4. Membership and annual membership fee waiver for successful applicant will expire on 31 March 2010. Next membership year will be started on 1 April 2010, annual membership fee shall be payable upon renewal.
5. The LSCM R&D Centre reserves the right to amend the promotional offers and these terms and conditions at any time without prior notice. In the event of any disputes arising out of this promotion, the decision of the LSCM R&D Centre shall be final.



A member of Hong Kong R&D Centres
香港研發中心成員



APPENDIX D

MEMBERSHIP APPLICATION FORM

Application Form for LSCM R&D Centre Membership

Membership Categories *(please select and mark with a tick)*

Centre Membership Categories

☐ Individual Membership

☐ Company / Institute Membership

☐ Technology / Solution Provider Membership

Part IA- General Information *(For "Company/ Institute" & "Technology /Solution Provider" Membership Only)*

Company Name (in English)

(In Chinese)

Office Address / Correspondence Address

Telephone Number

Facsimile Number

Email

Postcode

Country

Website

Name of Representative (in English) ☐ Ir ☐ Prof ☐ Dr ☐ Mr ☐ Mrs ☐ Ms

(in Chinese)

Position (in English)

(in Chinese)

Business Registration Number

Year of Establishment

No. of Staff (in Hong Kong)

No. of Staff (outside Hong Kong)

Part IB - General Information *(For individual Membership Only)*

Name (in English) ☐ Ir ☐ Prof ☐ Dr ☐ Mr ☐ Mrs ☐ Ms

(in Chinese)

Correspondence Address

Telephone Number

Email

Your Job (please specify your company name)

Postcode

Country

Part II - Industry *(please mark with a tick)*

☐ Government

☐ Non-profit Organization

☐ University

☐ Technology - Hardware Vendor

☐ Technology - Software Vendor

☐ Technology - System Integrator

☐ 3rd / 4th Party Logistics Service

☐ Shipping

☐ Freight Forwarding - Air / Sea

☐ Storage & Warehousing

☐ Carrier Services

☐ Cargo Terminal Operators

☐ Trucking

☐ Logistics & Courier Services

☐ Retailer

☐ Manufacturer

☐ Others, please specify:



APPENDIX D

MEMBERSHIP APPLICATION FORM

Part III - Payment Method

By Cheque

Please issue a cheque for the appropriate amount made payable to "Hong Kong R&D Centre for Logistics and Supply Chain Management Enabling Technologies Limited". Please write the full name of your company at the back side of the cheque. An acknowledgement of receipt will be returned to you within Ten(10)working days.

Issuing Bank: _____ Cheque Number: _____

Part IV - Terms and Conditions

1. Membership commences on 1 April and expires on 31 March each year. Annual Membership Fee will be calculated on quarterly basis (three months) for members joining at any time of the year.
2. Annual Membership Fee is payable upon application. Please issue a cheque payable to "Hong Kong R&D Centre for Logistics and Supply Chain Management Enabling Technologies Limited", and attach it to the application form.
3. Annual Membership Fee:
 - Free (Individual Membership)
 - HK\$2,000 (Centre Membership - Company / Institute)
 - HK\$10,000 (Centre Membership - Technology / Solution Provider)
4. Applications for membership will be considered by the LSCM R&D Centre at the regular meeting scheduled for that purpose, the entire application procedure will take around Forty-five (45) working days.
5. The applicant reserves the right of terminating the membership by giving no less than Thirty (30) days' written notice to the LSCM R&D Centre Office.
6. The LSCM R&D Centre reserves the right to use member's company name and logo for display in our official functions and marketing materials.
7. The LSCM R&D Centre reserves the right to amend these Terms and Conditions at any time without prior notice.

Part V - Declaration of the Applicant

1. The applicant declares that all particulars given in the application are true and correct.
2. The applicant agrees to the Terms and Conditions and the Bylaws relating to Membership (Appendix 1).
3. The applicant agrees to pay the annual membership fee upon application.
4. The applicant agrees the information submitted can be used by the LSCM R&D Centre for membership related purpose.**

Authorization Signature:

Position:

Date:

(For company membership, please sign with company chop)

****About Your Information and the Personal Data Privacy Ordinance**

The membership data can be used by the LSCM R&D Centre for membership related purposes such as production of the Members' Directory, issuing membership certificate, sending out circulars and publications, conducting surveys, or other directly related activities in print or on-line format. If you wish to make alternative arrangement or not to receive certain information, please inform us in writing. For unsuccessful applications, personal data collected will be destroyed after Six (6) months.

For LSCM R&D Centre Use

Membership Application Received on:

Received By:

Approved at Regular Meeting held on:

Membership Number:

Membership Class:

Remarks:

Handled by:

Funded by:



創新科技署
Innovation and
Technology Commission





APPENDIX D

MEMBERSHIP APPLICATION FORM

Appendix 1

BYLAWS OF THE HONG KONG R&D CENTRE FOR LOGISTICS AND SUPPLY CHAIN MANAGEMENT ENABLING TECHNOLOGIES

ARTICLE I MEMBERSHIP

SECTION 1

Categories of Membership: Membership in the Centre shall be in Three (3) categories as follows:

Individual: An individual membership shall be available to all person who is interested in innovative logistics and supply chain related technologies

Company / Institute: An organization membership shall be available to all companies / institutes, e.g. small or medium sized enterprises, venture capitalists, R&D organizations and universities

Technology / Solution Provider: An organization membership shall be available to all companies that provide solutions and technologies to end-user companies, e.g. vendors, SI

SECTION 2

Membership Application Procedures: Application for membership in the Centre shall be made by completing the prescribed form. The completed form shall be returned to the Centre in person, by mail or through on-line submission.

In person / By Mail:

1. Obtain the application form in person from the LSCM R&D Centre Office or download the form online.
2. Carefully read the Notes to applicant on the application form to understand the requirements and procedure for application for membership.
3. Submit the completed application form and a copy of Business Registration with annual membership fee* to the LSCM R&D Centre Office in person or by post. Please issue a cheque for the appropriate amount made payable to "HK R&D Centre for Logistics and Supply Chain Management Enabling Technologies Limited". An acknowledgement of receipt will be returned to you.
4. The LSCM R&D Centre Office will contact you for further information if necessary and will inform you of the result of the application in due course. The cheque payment will be settled only when the application is approved.
5. For membership enquiries, please contact the LSCM R&D Centre Office at (852) 2299 0551 quoting your reference number or email us at membership@lscm.hk

*Applicable to company membership only

On-line Submission:

1. Select "Online Registration" under Membership of the Centre's official website at www.lscm.hk.
2. Carefully read the Notes to applicant on the on-line application form to understand the requirements and procedure for application for membership.
3. Submit the completed form and select payment method.

(a) By Cheque

Please issue a cheque for the appropriate amount made payable to "Hong Kong R&D Centre for Logistics and Supply Chain Management Enabling Technologies Limited". The cheque should be sent together with a copy of Business Registration* to the following address within Two (2) weeks:

Hong Kong R&D Centre for Logistics and
Supply Chain Management Enabling Technologies
Room 202, Level 2, Block B, Cyberport 4
100 Cyberport Road, Hong Kong
(Ref.: Membership Application - Reference No. XXXX)

Please write the full name of your company at the back side of the cheque. An acknowledgement of receipt will be returned to you.

(b) By Credit Card

Please input credit card information on-line and the annual membership fee will be debited from this credit card only when the application is approved. Please send a copy of Business Registration* by fax: (852) 2299 0552 or email: membership@lscm.hk within 2 weeks.

4. The LSCM R&D Centre Office will contact you for further information if necessary and will inform you of the result of the application in due course.
5. For membership enquiries, please contact the LSCM R&D Centre Office at (852) 2299 0551 quoting your reference number or email us at membership@lscm.hk

*Applicable to company membership only.

The LSCM R&D Centre reserves all rights to amend the Terms and Conditions on the prescribed form at any time without prior notice.

SECTION 3

Membership Dues and Admission: Membership commences on 1 April and expires on 31 March each year. Annual Membership Fee shall be payable upon application. For renewal, Annual Membership Fee shall be payable on or before the first day of the next membership year.

Annual Membership Fee:

Individual:	Free
Company/Institute:	HK\$2,000.00
Technology / Solution Provider:	HK\$10,000.00

Membership fee will be calculated on quarterly (three months) basis for members joining at any time of the year.

The amount of Annual Membership Fee shall be determined annually by the Centre provided that the Centre may in its absolute discretion reduce, remit or waive any Annual Fee from or paid by an Individual, a Company/Institute or a Technology/Solution Provider member.

SECTION 4

Termination of Membership: Memberships may be terminated:

- (a) by resignation: A member in good standing, may resign at any time by giving Thirty (30) days written notice, and no annual dues or any part(s) thereof shall be refunded. Resignation shall take effect not earlier than Thirty (30) days after receipt of the written notice by the Centre.
- (b) by lapsing: A membership will be considered as lapsed and automatically terminated if such member's dues remain unpaid for Thirty (30) days after the first day of the membership year; however, the Centre may grant a grace period of an additional Thirty (30) days to such delinquent members. Members whose membership has lapsed shall be allowed to rejoin as a renewing member at the absolute discretion of the Centre.
- (c) by expulsion: A membership may be terminated by expulsion as provided in Section 7, Article I of these Bylaws, or any other conduct that is seriously prejudicial to the Centre.

SECTION 5

Transfer of Membership: Membership of the Centre shall not be transferred or assigned.

SECTION 6

Reinstatement: A person / company whose membership has been terminated for non-payment of dues may be reinstated as a member upon payment of the current annual dues. A person / company whose membership has been terminated for any other reasons may apply for reinstatement as a new applicant only as prescribed in Section 2 and 3 of this Article I. Reinstatement shall not be granted to persons / companies with any outstanding indebtedness to the Centre.

SECTION 7

Rules of Conduct: These Guidance Notes apply to all Members. The Centre may change or add any Rules from time to time provided that such changes or additions are not contrary to these Bylaws.

- (a) Members shall demonstrate a level of competence consistent with their class of membership
- (b) Members shall at all times act with integrity and contribute to society
- (c) Members shall not infringe intellectual property rights including but not limited to copyrights, trademarks, service marks, trade dress, design rights (registered or not) and patents of other, and shall give proper credit for intellectual property rights when usage of such right is granted
- (d) Members shall respect the privacy of other
- (e) Members shall be honest and trustworthy
- (f) Members shall be fair and not to discriminate regardless of religion, gender, disability, age, or national origin
- (g) Members shall reject bribery in all its forms, and shall avoid engaging in work or act that leads to conflict of interest situation
- (h) Members shall seek, accept, and offer honest criticism of R&D work, and to credit properly the contributions of others

SECTION 8

Personal Data Privacy Ordinance: The membership data can be used by the LSCM R&D Centre for membership related purposes such as production of the Members' Directory, issuing membership certificate, sending out circulars and publications, conducting surveys, or other directly related activities in print or on-line format. If you wish to make alternative arrangement or not to receive certain information, please inform us in writing. For unsuccessful applications, personal data collected will be destroyed after Six (6) months.

SECTION 9

Amendments: These Bylaws may be amended by the Board of Directors of the Centre from time to time at its discretion. In case of any discrepancy between the Bylaws and the Memorandum of Association of the Centre, the Memorandum of Association of the Centre shall prevail.



APPENDIX D

MEMBERSHIP APPLICATION FORM

Centre Membership		
Category	Criteria and Benefits	Annual Fee
Individual Membership	<p>Individual participates as an ordinary member.</p> <p>Members' Benefit</p> <ul style="list-style-type: none"> • Entry to international networks of companies and researchers • Have preference to participate in LSCM R&D Centre's organized events (e.g. training, conference) 	Free
Company / Institute Membership	<p>Company / institute participates as an ordinary member, e.g. small or medium sized enterprise, venture capitalist, R&D organizations and universities.</p> <p>Members' Benefit</p> <ul style="list-style-type: none"> • Entry to international networks of companies and researchers • Access to LSCM R&D Centre's project portfolio and information, provided that project confidentiality is not comprised • Have preference to participate in LSCM R&D Centre's organized events (e.g. training, conference) • Access to membership networks and member area on website • Have preference to participate / sponsor / co-organize in LSCM R&D Centre's events • Company name listed on LSCM R&D Centre website • Have rights to display "Member of LSCM R&D Centre" on business card and other various functions, occasions, materials and applications subject to approval 	HK\$2,000
Technology / Solution Provider Membership	<p>Companies that provide solutions and technologies to end-user companies. They will have preference to participate / speak / sponsor / co-organize in Centre's events.</p> <p>Members' Benefit</p> <ul style="list-style-type: none"> • Entry to international networks of companies and researchers • Access to LSCM R&D Centre's project portfolio and information, provided that project confidentiality is not comprised • Have preference to participate in LSCM R&D Centre's organized events (e.g. training, conference) • Access to membership networks and member area on website • Have preference to participate / sponsor / co-organize in LSCM R&D Centre's events • Company name listed on LSCM R&D Centre website • Have rights to display "Member of LSCM R&D Centre" on business card and other various functions, occasions, materials and applications subject to approval • Opportunity to champion new Supply Chain Management enabling technologies • Eligible to participate in providing consulting and solutions to LSCM R&D Centre community 	HK\$10,000

Application Procedures

1. Obtain the application form in person from the LSCM R&D Centre Office or download the form online.
2. Carefully read the notes to applicant on the application form to understand the requirements for membership.
3. Submit the completed form and a copy of Business Registration with annual membership fee* to the LSCM R&D Centre Office in person or by post. Please issue a cheque for the appropriate amount made payable to "Hong Kong R&D Centre for Logistics and Supply Chain Management Enabling Technologies Limited". An acknowledgement of receipt will be returned to you within Ten(10)working days.
4. Postal address: Hong Kong R&D Centre for Logistics and Supply Chain Management Enabling Technologies, Room 202, Level 2, Block B, Cyberport 4, 100 Cyberport Road, Hong Kong
5. The LSCM R&D Centre Office will contact you for further information if necessary and will inform you of the result of the application in due course. The cheque payment will be settled only when the application is approved.
6. For membership enquiries, please contact the LSCM R&D Centre Office at 2299 0551 quoting your reference number or email us at membership@lscm.hk.

* Applicable to company membership only



APPENDIX D

MEMBERSHIP APPLICATION FORM



即日起

成功申请成为研发中心会员，
可获豁免会员年费！
推广优惠至2010年3月31日，
请即行动！

研发中心会员计划

推广优惠条款及细则：

1. 推广期由2009年4月1日起至2010年3月31日止，首尾两天包括在内（「推广期」）。
2. 任何人士须于推广期内透过邮递或网上填妥研发中心会员申请表格及交妥申请所需之文件，成功申请者将获专函通知。
3. 研发中心会员申请须通过本研发中心的一般会员审批程序。
4. 成功申请者之会籍有效期及所获豁免之会费一律至2010年3月31日止。新一年度之研发中心会员会籍将于2010年4月1日起重新开始，届时旧研发中心会员必需缴交年费，方可更新研发中心会员之新会籍。
5. 本研发中心保留权利可修改优惠及本条款及细则，而毋须预先通知。是次推广如有任何争议，本研发中心保留最终决定权。



A member of Hong Kong R&D Centres
香港研发中心成员



APPENDIX D

MEMBERSHIP APPLICATION FORM

香港物流及供应链管理应用技术研发中心——会员申请表

会员类别 (请于适当位置划上勾号)

中心会员

☐ 个人

☐ 公司/学院

☐ 技术/方案供应商

甲部 (一) —— 申请人资料 (只供「公司/学院」和「技术/方案供应商」会员填写)

公司名称 (英文)

(中文)

办事处地址/通讯地址

电话号码

传真号码

电邮地址

邮政编号

国家

公司网址

公司代表人姓名 (英文)

(中文) ☐ 工程师 ☐ 教授 ☐ 博士 ☐ 先生 ☐ 太太 ☐ 女士

职衔 (英文)

(中文)

商业登记证号码 (等同营业执照注册号)

公司成立年份

香港职员人数

海外职员人数 (香港以外地方)

甲部 (二) —— 申请人资料 (只供个人会员填写)

申请人姓名 (英文)

(中文) ☐ 工程师 ☐ 教授 ☐ 博士 ☐ 先生 ☐ 太太 ☐ 女士

通讯地址

电话号码

电邮地址

职业 (请列明公司名称)

邮政编号

国家

乙部——业务性质 (请于适当位置划上勾号)

☐ 政府机构

☐ 三方/四方物流服务业

☐ 货车运输业

☐ 非牟利机构

☐ 航运业

☐ 物流及速递服务业

☐ 大学/学院

☐ 货运业-空运/海运

☐ 零售商

☐ 硬件供应商

☐ 仓库及货仓管理业

☐ 制造商

☐ 软件供应商

☐ 运输业

☐ 其他, 请列明:

☐ 系统整合商

☐ 货柜码头经营者



APPENDIX D

MEMBERSHIP APPLICATION FORM

丙部——付款方法

支票

请以支票支付会员年费，抬头祈付「香港物流及供应链管理应用技术研发中心有限公司」。请于支票背面填写公司名称。本研发中心将于收妥支票后十个工作日内向阁下发回收据。

银行名称：_____ 支票号码：_____

丁部——条款及细则

1. 会籍每年由四月一日起生效，三月三十一日期满。如于年中入会，会费将以季度(三个月)计算。
2. 报名须缴付年费。请以支票付款，抬头祈付「香港物流及供应链管理应用技术研发中心有限公司」，并连同申请表一并交回。
3. 年费：
 - 免费 (个人会员)
 - 港币2,000元 (中心会员-公司/学院)
 - 港币10,000元 (中心会员-技术/方案供应商)
4. 会员理事会将于下次例会讨论会员申请，申请过程约需四十五个工作日。
5. 申请人保留取消会籍之权利，但必须给予本中心办事处不少于三十天的书面通知方为有效。
6. 本研发中心有权于本研发中心之公开活动或宣传资料中展示会员的公司名称和商标。
7. 本研发中心保留更改条款及细则内容之权利，恕不另行通知。

中文译本如与英文原文有差异，概以英文为准。

戊部——申请人声明

1. 申请人确认申请表上填写的所有资料均属正确无误。
2. 申请人同意本研发中心提供之条款及细则和参阅附例(见附件1)。
3. 申请人同意于提交会员申请表时缴交年费。
4. 申请人同意本研发中心使用阁下已递交的资料用于与会籍有关的用途。**

授权人签名 (如申请人为公司，请盖上公司印章)	职衔	日期
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**关于阁下的资料与《个人资料(私隐)条款》

会员提交的资料，只可供本研发中心作与会籍有关的用途，如以印刷本或电子形式编制《会员名录》、签发会籍证书、发出通函及刊物、进行意见调查，或其他直接相关的活动。阁下欲作其他资料使用的安排或不想收到某些资料，请书面通知本研发中心。落选申请人的个人资料将于六个月内销毁。

只供本研发中心使用

会员申请表收妥日期：	接收职员：
会籍批核日期：	会员编号：
会员类别：	
备注：	负责职员：

资助：



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Technology Commission



HONG KONG
R&D Centres
香港研發中心



APPENDIX D

MEMBERSHIP APPLICATION FORM

附件 1

香港物流及供应链管理应用技术研发中心附例

第1条 会籍

第1节

会籍类别 本中心会籍分为如下三(3)个类别：

个人：

个人会籍适用于所有对创意物流及供应链相关技术感兴趣的人士

公司 / 学院：

机构会籍适用于所有公司/学会，例如中小型企业、创业资本家、研发机构及大学

技术/解决方案供货商：

机构会籍适用于所有为最终用户公司提供解决方案及技术的公司，例如软件开发商及系统整合商

第2节

会籍申请程序：如欲申请本中心会籍，须填写指定表格，然后亲身或以邮递方式交回本中心，或于网上递交表格。

亲身/以邮递方式递交

1. 亲身前往香港物流及供应链管理应用技术研发中心办事处索取申请表格，或于网上下载表格。
2. 细阅读附载于申请表上的申请人须知，以了解申请会籍的要求。
3. 将填妥的表格连同商业登记副本及会费*，亲身或以邮递方式递交香港物流及供应链管理应用技术研发中心办事处。请在支票写上适当金额，抬头请写「香港物流及供应链管理应用技术研发中心有限公司。」确认收据将于十(10)个工作日内寄回申请人。
4. 如有需要，香港物流及供应链管理应用技术研发中心办事处将与申请人联络，要求提供进一步的资料，并将在适当时候通知申请人有关申请的结果。支票将于申请获得批准后始过数。
5. 有关会籍查询，请致电(852)2299 0551与本中心办公室联络，并报上参考编号，或致电邮往membership@lscm.hk与本中心联络。

*只适用于公司会籍

网上递交：

1. 登入本中心的正式网站www.lscm.hk，在会籍项下选择「网上登记」。
2. 仔细阅读附载于网上申请表格的申请人须知，以了解申请会籍的要求。
3. 提交已填妥的表格，并选择付款方式。

以支票付款：

请在支票写上适当金额，抬头请写「香港物流及供应链管理应用技术研发中心有限公司。」支票须于两(2)星期内连同商业登记副本送交下述地址。支票背面请写上申请人公司的全名。确认收据将于十(10)个工作日内寄回申请人。

香港物流及供应链管理应用技术研发中心
香港数码港道100号数码港4B座2楼202室
(有关申请会籍事宜一参考编号XXXX)

以信用卡付款：

请输入信用卡资料，会费将于申请获得批准后始从有关信用卡户口扣除，请于两(2)星期内传真商业登记副本至(852)2299 0552或电邮至membership@lscm.hk。

4. 如有需要，香港物流及供应链管理应用技术研发中心办事处将与申请人联络，要求提供进一步的资料，并将在适当时候通知申请人有关申请的结果。
5. 有关会籍查询，请致电(852)2299 0551与本中心办公室联络，并报上参考编号，或致电邮往membership@lscm.hk与本中心联络。

香港物流及供应链管理应用技术研发中心保留权利随时对指定表格上的条款及细则进行修订，而毋须事先发出通知。

第3节

会费及入会费：会籍每年由四月一日起生效，三月三十一日期满。年费须于申请入会时缴付，续年会费则于下一会籍年度首日或之前缴付。

年费：

个人：	免费
公司 / 学院：	港币2,000.00元
技术 / 解决方案供货商	港币10,000.00元

如于年中入会，会费将以季度(三个月)计算。

第4节

会籍终止：会籍可于下述情况下终止：

退会：

纪录良好的会员可随时给予三十(30)天书面通知要求退会，年费将不获退还。退会生效日期不得早于本中心收到书面通知的日期。

会籍失效：

如会员于会籍年度首日三十(30)天内仍未缴付会费，其会籍将被视为失效且自动终止；然而，本中心可给予该等逾期未付会费的会员额外三十(30)天的宽限期。本中心会酌情批准会籍已失效的会员重新入会成为续会会员。

开除会籍：

会员可因本条例第1条第7节的规定或任何其他严重损害本中心的行为，而被开除及终止会籍。

第5节

会籍转让：本中心会籍不得转让或转借。

第6节

恢复会籍：因欠缴会费而被终止会籍的人士/公司，可于缴付该年度会费后恢复会籍。因任何其他原因而被终止会籍的人士/公司，只可按照本条例第1条第2及3节所指定的程序以新申请人身份申请恢复会籍。于本中心有任何未清缴债项的人士/公司，将不获准恢复会籍。

第7节

行为守则：以下的指引适用于所有会员。本中心可不时对任何守则作出增修，惟所增修的内容不可与该等附例相违。

1. 会员应展示与其会员等级相符的能力水平
2. 会员应时刻保持诚信，并对社会作出贡献
3. 会员不得侵犯知识产权，包括版权及其他方面的专利权；如获授权使用，应遵守知识产权法规
4. 会员应尊重他人的隐私
5. 会员应待人诚实可靠
6. 会员应处事公正，且不因宗教、性别、残疾、年龄或国籍等因素而产生歧视
7. 会员应拒绝接受任何形式的贿赂，并应避免参与会导致利益冲突情况出现的工作或行动
8. 会员应寻求、接受及提出对研发工作诚意的批评，并适当地对他人所作的贡献予以提述。

第8节

个人资料(私隐)条例：会籍资料可供香港物流及供应链管理应用技术研发中心作会籍相关的用途，如以印刷本或电子形式编制《会员名录》、签发会籍证书、发出通函及刊物、进行意见调查，或其他直接相关的活动。会员如欲另作安排或不欲收取若干资料，请以书面通知本中心。未获接纳申请入会人士的个人资料，将于六(6)个月销毁。

第9节

修订：本中心董事局或会不时酌情对本附例进行修订。假如本附例与本中心《组织大纲》存有任何歧异，概以本中心《组织大纲》为准。



APPENDIX D

MEMBERSHIP APPLICATION FORM

中心会员		
会员类别	准则及权益	年费
个人	<p>以个人名义成为基本会员。</p> <p>会员可享权益</p> <ul style="list-style-type: none"> • 打开公司和研究的国际网络 • 拥有优先权参与本研发中心举办之活动（例如培训、会议） 	全免
公司/学院	<p>以公司/学院名义成为基本会员，例如中小型企业、投资者、研发机构和大学。</p> <p>会员可享权益</p> <ul style="list-style-type: none"> • 打开公司和研究的国际网络 • 在不泄露研发项目机密的原则下，会员可得到本研发中心的研发项目纲要及资料 • 拥有优先权参与本研发中心举办之活动（例如培训、会议） • 登入会员网络及会员专用网页 • 拥有优先权参与/赞助/合办本研发中心的活动 • 公司名字可刊登于本研发中心之网页 • 有权于名片上或于不同活动、场合、刊物和申请上显示「香港物流及供应链管理应用技术研发中心会员」之字样，但须获本研发中心批准 	港币2,000元
技术/方案供应商	<p>为终端用户公司提供方案和技术的公司。他们享有优先权参与或赞助本研发中心举办之活动，亦可于活动中参与演讲或与本研发中心合办活动。</p> <p>会员可享权益</p> <ul style="list-style-type: none"> • 打开公司和研究的国际网络 • 在不泄露研发项目机密的原则下，会员可得到本研发中心的研发项目纲要及资料 • 拥有优先权参与本研发中心举办之活动（例如培训、会议） • 登入会员网络及会员专用网页 • 拥有优先权参与 / 赞助 / 合办本研发中心的活动 • 公司名字可刊登于本研发中心之网页 • 有权于名片上或于不同活动、场合、刊物和申请上显示「香港物流及供应链管理应用技术研发中心会员」之字样，但须获本研发中心批准 • 有机会使用新的供应链管理应用技术 • 可参与提供顾问服务和方案予本研发中心 	港币10,000元

申请程序

1. 亲身前往本研发中心办事处索取会员申请表或从本研发中心网站下载。
2. 请仔细阅读会员申请表上的申请人须知，以了解会员计划的申请条件及程式。
3. 填妥会员申请表后，连同商业登记证副本和会费*亲身递交或邮寄至本研发中心办事处。请以支票付款，抬头祈付「香港物流及供应链管理应用技术研发中心有限公司」。本研发中心将于收受支票后十个工作日内向阁下发回收据。
4. 如有需要，本研发中心办事处会联络阁下以获取更多资料和通知阁下会员申请的结果。本研发中心只会于申请获批后才兑现交回之支票。
5. 通讯位址：香港数码港道100号数码港4B座2楼202室 香港物流及供应链管理应用技术研发中心。
6. 有关会员申请查询，请致电2299 0551联络本中心办事处，查询时请引述阁下的参考编号以便翻查资料。亦可以电邮至 membership@lscm.hk 查询。

* 只适用于公司会员



Hong Kong R&D Centre for Logistics and
Supply Chain Management Enabling Technologies
香港物流及供應鏈管理應用技術研發中心

Contact Us

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聯絡我們

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