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另一个视角看航运联盟

CONSIDERING SHIPPING ALLIANCE FROM ANOTHER PERSPECTIVE

提升供应链管理水平 建设供应链平台

ENHANCE SUPPLY CHAIN MANAGEMENT LEVEL AND ESTABLISH SUPPLY CHAIN PLATFORM

论内部培训师管理制度的创建路径

ON THE CREATION OF THE MANAGEMENT SYSTEM FOR INTERNAL TRAINERS



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财经

Finance

中国人民银行：继续稳健货币政策

中国人民银行官方网站发布消息，央行货币政策委员会三季度例会强调，继续实施稳健的货币政策，灵活运用多种货币政策工具，保持适度流动性，实现货币信贷及社会融资规模合理增长。

货币政策委员会三季度例会认为，当前我国经济运行仍处在合理区间，金融运行总体平稳，物价基本稳定，但形势的错综复杂不可低估。国际经济形势和主要经济体货币政策出现分化，美国经济的积极迹象较多，欧元区再次加大货币政策宽松力度，部分新兴经济体实体经济仍面临较多困难。

货币政策委员会三季度例会强调，密切关注国际国内经济金融最新动向和国际资本流动的变化，坚持稳中求进、改革创新。改善和优化融资结构和信贷结构。继续深化金融体制改革，增强金融运行效率和服务实体经济能力。进一步推进利率市场化和人民币汇率形成机制改革，保持人民币汇率在合理均衡水平上的基本稳定。

(来源：广州日报)

新媒：中新将启动货币直接交易

新加坡媒体报道，中新即将启动人民币和新元的直接交易，未来将不再需要通过美元这个中间环节。新加坡《联合早报》援引金融界(5.39, -0.35, -6.10%)消息人的话报道说，经过近一年的协商，中国和新加坡两国货币直接交易的技术细节已经解决，相关消息将在月内公布。分析师普遍认为，这项合作将有助于推动人民币国际化，并巩固新加坡作

为离岸人民币中心的地位。

新加坡华侨银行经济分析师谢栋铭说，新元和人民币直接交易将带来三大好处：减少交易成本，给予新加坡银行参与中国金融市场的机会，并传递两国金融合作将进一步加强的信号。新加坡金融管理局去年3月与中国人民银行续签了中新双边本币互换协议，互换规模由原来的1500亿元人民币扩大至3000亿元人民币，有效期三年，经双方同意可以展期。去年4月，双方针对人民币业务合作签署备忘录，5月正式启动人民币清算服务，令新加坡成为中国境外的首个离岸人民币清算中心。

(来源：新华网)

美元指数高涨打压全球大宗商品

9月底至10月初，美元指数迎来了一波暴涨行情，且美元对一揽子国际主要货币的汇率均在大幅上涨。然而，以美元计价的大宗商品价格却在持续下跌，尤其是原油、铁矿石和黄金跌幅明显。

今年6月30日以来，彭博大宗商品指数下跌了11%，整个二季度跌幅为2011年以来最大。与此同时追踪10种主要货币对美元指数跳涨6.5%，为2008年以来的最大幅度。

追踪22种原材料价格的彭博大宗商品指数已跌至五年低点，同时大规模的资金开始撤离大宗商品市场，与此同时，美元指数已经连续向上突破86。

分析人士认为，撤出大宗商品资金的投资者主要看淡此类资产的需求前景，尤其是谷物、能源和铁矿石等受中国经济增

速放缓影响明显的大宗商品。而这次美元的上涨，主要是受到美国经济回暖，名义或真实利率上涨的推动。

与此同时，中国房地产市场的疲弱也在打压大宗商品价格，中国房地产行业的数据已经持续数月低迷，也导致大宗商品的需求不足。除了螺纹钢和铁矿石之外，玻璃、焦煤、焦炭、热卷等建材品种近期跌势也非常明显，而螺纹钢和铁矿石自7月中旬以来已经分别下跌了15%和20%。

(来源：第一财经日报)

全球经济前景和需求预估拖累油价

全球油价周二恢复持续了数月的跌势，收在逾两年最低，因经济和需求增预估被下调。

美国原油(87.95, -0.90, -1.01%)跌幅大于布兰特原油，逆转布兰特/美国原油溢价收窄的趋势，因有迹象显示，美国炼厂开始购买降价后的西非和地中海原油，重启曾风靡一时的套利窗口。

国际货币基金组织年内第三次下调全球经济成长预估，警告欧元区核心国家、日本，以及巴西等新兴市场国家增长放缓。德国8月工业生产录得2009年1月以来最大降幅。

布兰特较美国原油溢价扩阔至3.26美元，今日稍早触及一年最窄水平2.08美元。这为部分东海岸炼厂购买尼日利亚或阿塞拜疆原油，而非国内价格更高的原油创造了可能性。

投资者静待美国原油库存数据出炉。一项路透调查显示，分析师预计上周美国原油库存增加140万桶。美国石油协会

(API)将在今日稍后公布库存数据，美国能源协会将在明日公布库存报告。

(来源：新浪财经)

贸易

Trade

9月贸易顺差意外下滑

海关总署近日公布的数据显示，中国9月出口同比(按美元计价)增长15.3%，预期为增长12%；进口同比增长7.0%，预期为增长-2.0%。中国9月实现贸易顺差310亿美元，预期为顺差411亿美元，前值顺差498.3亿美

元。中国9月出口2137亿美元，前值2084.6亿美元。中国9月进口1827亿美元，前值1586.3亿美元。

(来源：航运界)

中国9月钢材出口创新高

中国9月进出口增速双双超预期增长，部分大宗商品进口表现强劲。中国9月铁矿砂及其精矿进口创历史次高水平；钢材出口刷新历史最高记录。

尽管9月美元表现强劲，但这类大宗商品的国际价格总体在下跌，因此进口总价变动不大。

英国《金融时报》报道援引凯投宏观(Capital Economics)经济学家Julian Evans-Pritchard观点称：9月的贸易数据表明国外需求保持健康。尽管进口增速也在反弹，但这不应该被视为中国需求增速进入转折点的信号。强劲的进口增速

更可能反映出市场对海外零部件加工和再出口需求的短暂回暖，而非中国消费增速反弹。对于中国9月出口增速超预期，Julian Evans-Pritchard认为，这可能预示着海外市场需求在全球经济稳步改善的背景下将持续增长。

（来源：航运界）

印尼今年前3季度煤炭出口超2亿吨

印尼矿业与能源部煤炭局局长史迪亚布迪日前表示，虽然煤炭限制出口条例从酝酿到10月10日具体实施前后躁动了大半年时间，但今年前3季度煤炭出口已达到2.3476亿吨。

史迪亚布迪说明，矿业与能源部已向160家企业颁发了限制出口通令，其中36家拥有煤矿开采工作协议、91家持有煤炭开采准证、33家持有特别运营煤炭开采准证。矿业与能源部最迟将于11月初开始对有关煤炭限制出口条例贯彻进行全面性评价，以利于政府掌握具体情况并开展今后的指导监督工作。

印尼煤炭和能源供应商协会秘书长艾卡瓦尤也公开表示，煤炭限制出口条例并没有对煤炭出口造成明显影响，因为在煤炭限制出口条例实施之前，许多中小企业停止生产，产能逐渐向大企业转移。可以预料的是，在政府煤炭限制出口条例的制约下，印尼的煤炭生产和出口由大企业主导的比例将继续提高，出口量也将保持稳定增长。

（来源：航运界）

以运力衡量，丹麦马士基航运与瑞土地中海航运是全球最大的两家集装箱航运公司。两家公司7月达成称为“2M”的10年合作协议，预计节省数十亿美元运营成本。

马士基航运与瑞土地中海航运原本打算结合达飞轮船建立P3联盟，中国监管部门否决这项提议，理由是担心这些公司的联合将对中国的集装箱航运公司构成威胁。

2M联盟的货运量将占到亚欧航线货运总量的35%，同时还将分别占跨太平洋和跨大西洋航线货运量的15%和37%。这两家公司结盟后，船队中将包括马士基的20艘3E级集装箱运输船，这是集装箱运输业中船体最大且效率最高的运输船，每艘船可以运送18000多个集装箱。

（来源：深圳港口协会）

天津港口岸新一轮扩大对外开放计划

国务院日前正式批准天津港口岸新一轮扩大对外开放计划，批准天津港口岸新增对外开放水域1120平方公里，新增码头岸线69.1公里，新建对外开放码头泊位71个。

据介绍，此次国务院批准的天津港口岸开放水域从470平方公里扩大到1590平方公里，码头岸线总长从78.9公里扩大到148公里，批准新建的码头泊位从75个增至146个，开放程度大为增加。

“这次批准主要是扩大到了天津港南部的大沽口、南港等港区。要真正实现有效、可用、易用的开放，还需要政府部门联合港口，一步步务实推进通关配套，具备条件经统一验收后才能真正实现开放。”天津市口岸服务办公室综合处的工作人员表示。

天津港下辖的东疆港区，是当前天津市申报自贸区的主要阵地。此番扩大开放将为支持东疆及滨海新区周边加快涉外体制改革创造条件，同时极大提升投资和服务贸易便利性。

在此次扩大开放的区域内，天津港正在建设一个30平方公里的世界级人工港岛，目前正处于外围防波堤前期建设阶段。

（来源：新华网）

京津冀港口资源整合正在加速

据悉，北京朝阳陆港口岸2015年6月将平移到通州马驹桥口岸，马驹桥口岸通关能力将达到60万标箱，相当于目前朝阳口岸的4到5倍。

在天津港集团（下称“天津港”）的陆港扩容升级计划中，朝阳口岸的搬迁扩建只是一部分。近期，天津港将在河北唐山、廊坊和天津静海、武清等地新建陆港口岸，使该集团在京津冀地区的陆港口岸增加到10个。据了解，天津港集装箱货源中，京津冀地区占到80%以上。

京津冀协同发展上升为国家战略以来，天津与河北的港口资源整合开始取得突破。津冀港口投资公司已于8月18日在天津东疆保税港区挂牌成立，该公司的目标是统筹利用天津、河北两地的港口资源和航运要素，不断优化京津冀地区港口的合理分工以及产业布局。

利好的消息是，有参与京津冀协同发展规划的专家表示，京津冀一体化办公室正在推动港口的顶层设计，未来集装箱业务可能是天津港的发展重点，而矿石、煤炭、油品等业务可能会向河北几个港口转移。

（来源：航运界）

珠三角区域增促综合交通运输合作

9月26日，第十届泛珠三角区域交通基础设施专题磋商会在广州召开。

会议就泛珠三角区域跨省公路、水路项目规划对接和建设协调；省（区）际铁路项目规划对接和建设协调；合作推进公—铁—水联合运输、共建内陆无水港、共建21世纪海上丝绸之路；加强交通管理和执法协作、高速公路联网收费、交通信息互联互通等方面进行了专题磋商，达成了广泛共识，并拟在近期联合签署《关于推进泛珠三角区域暨重庆市交通运输一体化的框架合作协议》。重点加强和推进四方面合作：一是加强和推进交通基础设施网络互联互通；二是加强和推进交通管理信息互联互通；三是加强和推进综合运输合作发展。四是加强和推进定期协商工作机制。

（来源：广东省港口协会）

阿拉伯航运与汉堡南美展开全面合作

阿拉伯航运（UASC）与汉堡南美（Hamburg Süd）日前签署了横跨欧美亚的全球合作协议。协议规定，自2014年年底起，汉堡南美将进入阿拉伯航运的亚洲至北欧、亚洲至美国航线经营；同时，南美轮船也将分享汉堡南美的欧洲至南美东岸与亚洲至北美东岸航线。

汉堡南美主席奥特马·嘉斯特（Ottmar Gast）表示，该合作将使双方的核心服务和网络得到互补，在不增加运力的情况下为客户提供更加全面的全球性覆盖与可靠服务。双方通过部署高效环保船舶，让客户受益。

阿拉伯航运总裁兼首席执行官Jörn Hinge称“此次合作展示了我们雄心勃勃提高全球航线覆盖的方式。在今天这样具有挑战性的市场中，客户应当拥有更多机会去接受更好的服务以及更高的效率。”就在这份新的合作协议签署几周前，阿拉伯航运刚刚宣布与达飞海运（CMA CGM）、中海集运（CSCL）组建“03”联盟。

（来源：航运界）

上海自贸区洋山保税港区“区港直通”正式启用

上海自贸区洋山保税港区“区港直通”启用，标志着“区港一体化”运作进入了新的发展阶段，将为进一步探索贸易监管制度创新打下基础。

“区港直通”位于上海自贸区洋山保税港区海港大道同望路口，是连接自贸区洋山保税港区岛域和陆域的内部通道。“区港直通”启用前，一线进出境车辆需先经二线卡口，再经口岸查验区上东海大桥，单程多绕行6公里，且需两次卡口验放；“区港直通”启用后，一线进出境车辆通过“区港直通”直接验放，进一步完善了自贸区洋山保税港区交通网络的整体布局，降低了区内企业的物流成本，提高了物流时效。

与此同时，“区港直通”实施7×24小时验放模式，对进出境车辆过卡口实行自动比对、自动判别、自动验放等智能化管理，有效提高了企业承运车辆的通行效率，也完善了洋山保税港区的物流监控体系。

（来源：航运界）

港航

Port&Shipping

全球航运巨擘争结盟

法国集装箱航运巨头达飞轮船近日表示，已与中国中海集运和中东船运巨头阿拉伯联合航运结盟，将在全球一些最繁忙的贸易航线上共享船只。据参与该交易的人士称，这一称为Ocean Three的新联盟预计将部署约150艘船只，这些船只的货运量将占亚欧航线货运总量的20%左右，同时还将分别占跨太平洋和跨大西洋航线货运量的13%和7%。

广州南沙集装箱三期泊位试运营

9月27日上午，广州港南沙集装箱三期12和13号深水泊位开始进入试运营，新增港口通过能力超过1.2亿吨，相当于再造了一个广州港。

广州港南沙港区三期码头工程是广东省、广州市重点建设项目。该项目包含万吨级集装箱泊位6个，2千吨级集装箱驳船泊位24个，岸线总长4178米，设计通过能力570万标准箱，码头陆域纵深1177米，陆域面积约276.6万平方米，并留有进一步提高通过能力的余地，总投资概算约为75亿元。此次先行投产的两个集装箱深水泊位装备了12台额定能力为65吨、起升高度达49米、外伸距离可达70米的大型集装箱岸桥式起重机以及相应的信息管理系统，可以轻松应付“爱迪马士基”等装箱量超过18000标准箱的世界最大集装箱船的作业要求。

（来源：航运界）

青岛港老港区将向旅游功能转化

9月25日，青岛市交通运输委港航管理局党委委员王家才介绍，今年以及未来几年，青岛港口发展将以青岛港集团转型发展为契机，坚持做大做强董家口港区，做优前湾港区，调整黄岛港区，提升老港区功能。

董家口港区以大宗散货、液体化工品、集装箱及杂货运输为主，逐步发展成为服务腹地物资运输和临港产业开发的大型综合性港区。坚持集约化利用岸线，承接前湾港区、黄岛港区、老港区部分功能转移。前湾港区以国际集装箱干线运输为主，未来铁矿石、煤炭等大宗干散货运输将逐步向董家口港区转移，恢复散杂泊位正常营运能力；充分利用保税港区优惠政策，扩大国际中转，同时加快前湾港区后续集装箱泊位建设，确立东北亚集装箱枢纽港地位。黄岛港区将根据市政府的部署逐步调整，向港航服务功能转型。老港区逐步由货运功能向城市旅游功能转化，优化港区布局，建设邮轮母港，完善配套设施，承担部分城市生活物流功能。

（来源：航运界）

上海自贸区调整外商投资船舶政策

在9月28日公布的《关于在中国（上海）自由贸易试验区内暂时调整实施有关行政法规和经国务院批准的部门规章规定的准入特别管理措施的决定》中，对《外商投资产业指导目录》里的涉及船舶制造业条款做了相应调整。

调整后，将在上海自贸区内允许外商以独资形式从事豪华邮轮、游艇的设计与船舶舱室机械的设计。

（来源：航运界）

亚洲至地中海线或成新联盟第一战场

Alphaliner在近期周报中称，拟组建的2M联盟和Ocean Three (03) 协议的承运人将增加在亚洲至地中海航线的运力，这可能催生联盟间的第一场大战。当上述联盟投入运营时，该航线的周运力将增加约1.4万TEU。Alphaliner认为，这可能引发另一场价格战，使日前在该航线维持的“脆弱的停战”重新动荡。该机构称，远东至地中海航线暂时的需求恢复将不足以吸收如此大规模的运力增幅。2M将在亚洲和地中海间经营5条航线，03将经营4条。这2家联盟的成员目前在亚洲至地中海间经营7条航线。2014年1至7月，亚洲至地中海线的货量同比增长了7%，而G6联盟2013年9月取消了“Loop 9”线，CKYH联盟2014年4月取消了“MD3”线。Alphaliner还介绍，2M和03新增的运力将分散在东、西地中海，亚德里亚海和黑海地区增加的最多。新增运力中的大部分将来自将取消的、马士基航运（Maersk Line）和法国达飞（CMA CGM）合作经营的航线，2M和03为维持各自的航线覆盖，将被迫提供重复的航线。Alphaliner还表示，马士基航运和法国达飞的合作伙伴将获益最多，因为他们能显著增加对地中海市场的航线覆盖，航次数也将增加。

（来源：航运界）

长江广东将通关作业一体化

海关总署网站近日发布《关于开展长江经济带海关区域通关一体化改革的公告》及《关于开展广东地区海关区域通关一体化改革的公告》。根据公告，海关总署决定在广州、深圳、拱北、汕头、黄埔、江门、湛江海关（以下简称广东地

区海关）启动区域通关一体化改革，建立区域通关中心，构建统一的申报平台、风险防控平台、专业审单平台和现场接单平台，形成涵盖广东地区海关通关全流程的一体化管理机制和运行模式，实现广东地区通关作业一体化。另外，海关总署还决定在上海、南京、杭州、宁波、合肥、南昌、武汉、长沙、重庆、成都、贵阳、昆明海关启动长江经济带海关区域通关一体化改革，建立区域通关中心，构建统一的申报平台、风险防控平台、专业审单平台和现场接单平台，形成涵盖长江经济带海关通关全流程的一体化管理机制和运行模式，实现长江经济带通关作业一体化。分析人员认为，上述消息将对相关区域的经济贸易起到积极的作用，本次的改革方案有助于传统贸易商降低通关成本，降低进口贸易库存风险。

（来源：深圳港口协会）

中山港将建综合性现代化港区

近日，中山市交通运输局公布了中山港马鞍港区规划调整专项规划环境影响评价公众参与第二次信息公示，明确马鞍港区将发展成为具有装卸储存、中转换装、多式联运、运输组织、临港产业开发、仓储商贸、现代物流、通信信息、客运休闲旅游、综合服务等多功能、综合性现代化港口。根据规划调整，该港区港口岸线将由原来的13公里调整至20公里。

在规划调整前，马鞍港区规划为主要为后方临港工业区装备制造、建材、加工等产业承担原材料、产品、设备及其他各类物资运输服务，并兼备集装箱、散杂货等物资转运功能的综合性港区；调整后，该港区将为翠亨新区的城市和产业发展服务，承担后方临港工业区的原材料、产品、设备及其他各类物资运输，提供集装箱、散杂货等物资转运和客运服务，同时兼顾城市滨水旅游休闲功能，发展为多功能的综合性现代化港区。

（来源：深圳港口协会）

新加坡港航巨头牵手北部湾港务

在第11届中国—东盟博览会开幕式上，新加坡太平船务与新加坡国际港务集团分别与广西北部湾国际港务集团签署谅解备忘录，拟加深在港口相关领域的双边合作，例如港口建设和运营、集成化物流系统、物流以及地产等。

港口合作是今年东盟博览会的重点关注之一，东盟多国领导人见证了谅解备忘录的签署。其中新加坡太平船务与广西北部湾国际港务集团有限公司签署的合作框架协议包括集装箱航线、集装箱码头、物流园区等。据介绍，此项协议的签署将提升广西作为西南地区出海门户的作用，建立服务西南、中南、华南，辐射东南亚乃至世界各地的完善的物流体系。同时增强港口服务功能，开拓新市场，进一步延伸港口物流服务，并且奠定新加坡与中国广西在航运、海事工业、港口及物流等领域合作的新里程碑，为中国—东盟自贸区及“海上丝绸之路”的建设与发展贡献力量。

（来源：深圳港口协会）

宁波航交所和波罗的海交易所签约

伦敦时间9月16日下午，由宁波航运交易所和波罗的海交易所共同主办的海上丝绸之路——航运融资和大宗商品贸易研讨会在伦敦举行。

宁波市副市长王剑侯在致辞中说，伦敦是英国第一大城市和第一大港口，拥有世界上最完备的航运融资、海上保险等服务体系。波罗的海交易所是世界上建立最早，也是唯一的世界性的航运交易所，拥有众多的会员企业，积极为需要船舶的人及拥有船舶或经营船舶的人提供良好服务，促进了海运经贸发展。宁波是海上丝绸之路的起源地之一，是中国东南沿海的重要港口，与世界各地有广泛的经贸往来，在经济全球化的今天，提出并倡导建设“21世纪海上丝绸之路”的战略，又为中国新一轮的对外开放注入了新内容，为航运业发展注入了新动力。希望研讨会能搭起交流合作的桥梁，今后两座城市加强在航运、金融、资讯等方面的合作，共同推进港口联盟的国际化。

研讨会上，宁波航运交易所总经理董善华和arrow经济研究院执行总裁 Jameleake、nortonrose律师事务所合伙人 Simonlew 等中英专家发表了主题演讲，分析了世界航运业的发展趋势和所面临的问题，提出了很多可行性建议。

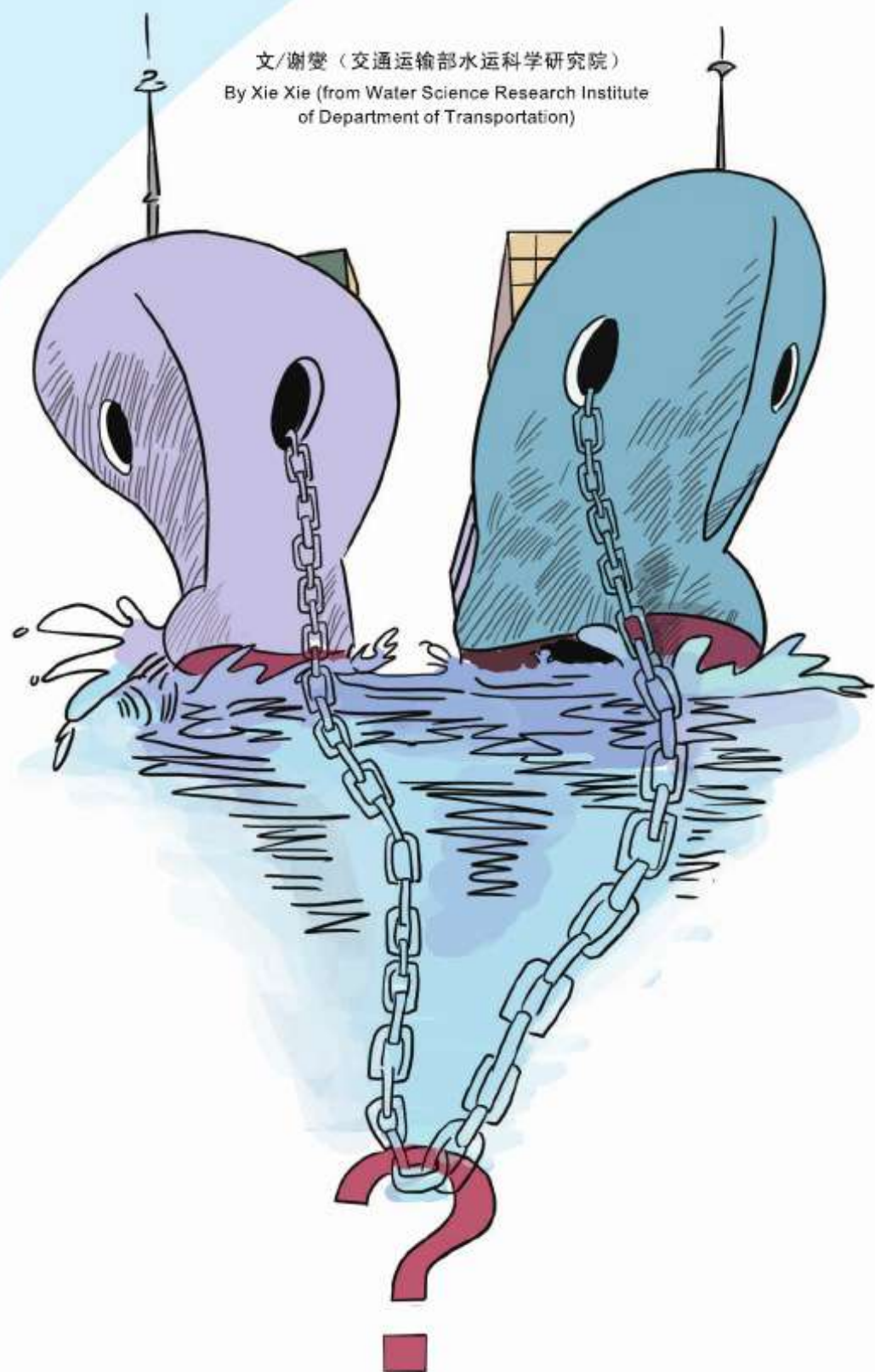
宁波航运交易所和波罗的海交易所签署了框架合作协议，协议包括共同开发集装箱运价指数、互相交流航运人才等内容。

（来源：航运界）

另一个视角看航运联盟

CONSIDERING SHIPPING ALLIANCE FROM ANOTHER PERSPECTIVE

文/谢燮 (交通运输部水运科学研究院)
By Xie Xie (from Water Science Research Institute
of Department of Transportation)



【摘要】对航运联盟是否引起垄断定价、不公平竞争和伤害货主等进行了深入分析，对航运联盟的未来走向以及对港口竞争格局的影响进行了分析，最后给出了中国船公司应当采取的对策。

【关键词】航运联盟 垄断 不公平竞争 港口格局

集装箱运输的基本特征：第一，船舶大型化具有明显的规模经济效应；第二，作为物流服务的重要环节，其所提供的产品具有不可存储性，边际成本很低，这使得舱位利用率成为每个船公司盈利的关键点。规模经济和舱位利用率的两难权衡很难在一个船公司内部解决，而航运联盟通过挂靠港口互补、船期协调、舱位互换、信息互享等合作恰恰解决了上述问题，这是航运联盟自1990年以来大行其道的根本原因。从竞争策略来说，通过提供差异化服务来提高收益是一个可行的方案，但海运服务的差异化有限，马士基公司所尝试推行的“天天马士基”取得了一定成效，但马士基高管也坦承在航运领域找到差异化服务很难。在当前市场环境极为恶劣的情况下，控制成本是航运公司的不二选择，而航运联盟恰好能够解决这个问题。P3联盟自去年提出以来，引起了航运业的大震动，航运公司担心超级的P3联盟通过垄断压榨其市场空间，相关政府管理部门担心P3联盟引发不公平竞争。6月17日商务部对P3联盟否决，让业内暂时松了口气。不成想，7月10日，马士基航运宣布将与地中海航运有限公司(MSC)成立2M联盟。看来，有关航运联盟的话题还将继续。那么，航运联盟是否会引起不公平竞争？规模足够大的航运联盟是否存在垄断的可能？本文从另一个视角试图给予解答。

航运联盟不会垄断定价

从市场格局看，国际集装箱运输市场将形成2M、G6和CKYHB等联盟。2M的运力规模将不会超过30%，其并不能垄断

Abstract: A thorough analysis is made on monopoly pricing, unfair competition and damage on the owners caused by the shipping alliance; the future direction of the shipping alliance and influence on port competition pattern is also analyzed; finally the countermeasures that the Chinese shipping companies shall take are given.

Keywords: shipping alliance, monopoly, unfair competition, port pattern

The basic characteristics of container transportation are: first, large-scale ships have obvious scale economic effect; second, as an important part of the logistics services, their products cannot be kept long in storage so that their marginal cost is very low, which makes the space utilization rate become the key point for each shipping company's earnings. It seems difficult to overcome the dilemma between scale economy and space utilization rate within a shipping company, but it has been precisely solved by the shipping alliance through port complementation, shipment coordination, shipping space swap, information sharing and other co-operations. This is the fundamental reason for the popularity of the shipping alliance since 1990. From the competitive strategy, the provision of differentiated services to raise the income is a feasible option, but the difference of maritime transport services is limited. Though the "Daily Maersk" has achieved certain results, the Maersk executives also admit that it is difficult to find the service differentiation in the shipping field. In the current extremely bad market environment, the control cost is the only choice for the shipping company to make, and it is the shipping alliance that can solve this problem. The P3 Alliance proposed last year has caused a major shock of the industry, and some shipping companies fear that the super P3 Alliance will, through the monopoly, press their market space and the relevant government administrative departments worry that P3 Alliance will cause an unfair competition. On June 17, the Ministry of Commerce rejected the proposal of the P3 Alliance, and it came as a temporary relief to the industry. To its astonishment, July 10th, Maersk announced that it would form another alliance named the 2M Alliance with Mediterranean Shipping Company (MSC). It seems that the relevant shipping alliance will continue to be a hot topic. Will the shipping alliance result in unfair competition? Is it possible that the scale the shipping alliance, if large enough, has a monopoly? In this paper, tries are made to answer the questions from another perspective.

定价，因为还存在其他两大联盟的竞争。而且，在2M联盟内部，两家公司各自定价，不同公司由于成本构成不同所采取的定价策略也不同，因而无法形成一致性的价格。总体来看，价格始终受供需影响，在当前运力大幅过剩的市场环境下，看不到因为联盟而形成涨价的可能，航运联盟只能从降低成本上获得竞争优势。同时，航运联盟使得航运运行效率提升，提高了舱位利用率，这在一定程度上加剧了市场运力过剩，因而短期来看只能使总体运价下行。长期来看，联盟使得船东购船的意愿下降，对未来运价向上具有正面作用。

有人说2M联盟在运行成熟具有垄断力后，就有可能涨价。在目前的市场环境下，看不到涨价的可能。一旦涨价，市场份额就可能流失，因为竞争对手都在虎视眈眈。如果某一天真的涨价成功，那也不是垄断造成的，而是市场供需关系发生了逆转。2M联盟因降低成本所获得的收益一部分让渡给货主，也就是降价，一部分成为自己的收益。

1. The shipping alliance will not monopolize pricing.

The international container transportation market will produce alliances such as 2M, G6 and CKYHE from the market patterns. The 2M's capacity will not exceed 30% of market share, from which the monopoly pricing cannot arise because there are still two other major competitors. Moreover, in the 2M Alliance, the two companies set their own prices respectively; there will be different pricing strategies for different cost structures, and therefore, a consistent price can not be formed. Generally speaking, prices are always affected by supply and demand, in the current market environment of excess capacity, the possible price rise because of the alliance can not be expected, and the shipping alliance gains its competitive advantage only by lowering costs. At the same time, the shipping alliance helps the shipping operation improve its efficiency and its space utilization rate, which exacerbates the market excess capacity to a certain extent, so that in a short term, the overall freight rates can only be going down. In a long term, the alliance will make the owners have less intention to purchase ships, and therefore, it will bring about positive effect on the price rise.

Some people say that the freight rates are likely to rise after the 2M Alliance is mature enough to possess a monopoly power. In the current market environment, we can not see its possibility. Once the price gets up, its market share will be losing, because it is covetously eyed by all the rivals. If the price really gets up some day, the cause is not the monopoly but the change of the market supply and demand. The benefits that the 2M Alliance gains by reducing the cost will be divided, transferred in part to the owners (price reduction) and kept in part for themselves.

2. The shipping alliance will not cause any unfair competition.

In the current market environment, the three major shipping alliances have the absolute advantage to occupy the market space, so small companies may be squeezed out of the top three main routes. But because the freight rates the shipping alliances offer are much lower, their services are more extensive and their shipping schedules are much denser, all of these are not against the normal market competition rules. The pricing of each ship company is decided by many factors, but finally it will be tested by the market. Any company has to obtain its competitive advantage through the market, so the rise and fall of the price has nothing to do with the value judgment. The shipping alliance and large-scale ships have reduced the nodes of the regional transportation hub ports and increased the space of feeder services, which small shipping companies will have to make use of for survival. The survival of the fittest is the rule of the market, but not taking the advantage of the government or the anti-monopoly law to counter after the failure in the normal competition. Ronald Coase said: "I was tired of the anti-monopoly law. If prices rise, the judge says it is a 'monopoly pricing'; if prices fell, he will say it is a 'predatory pricing'; if prices stays unchanged," he will then say it is a

航运联盟不会引起不公平竞争

在目前的市场环境下，三大航运联盟占据了绝对优势的市场空间，小型航运公司可能被挤出三大主力航线。但由于航运联盟为货主提供了价格更为低廉、覆盖面更加广泛、班期更加密集的服务，属正常的市场竞争法则，完全看不到哪里有不正当竞争的痕迹。每家船公司的定价由诸多因素决定，最终都要由市场检验，通过市场获得竞争优势，价格行为的涨和跌没有那么多价值判断。航运联盟和船舶大型化使得枢纽港口的节点减少，支线运输的空间加大，这是未来小型航运公司的生存空间。市场的法则是优胜劣汰，而不应该是在正常的竞争中失败后借政府的反垄断法来反击。罗纳·德斯曾言：“我被反垄断法烦透了。假如价格涨了，法官就说是‘垄断定价’；价格跌了，就说是‘掠夺定价’；价格不变，就说是‘勾结定价’”。从国际经验看，对垄断的指控往往是“欲加之罪何患无辞”，完全找不到内在一致的逻辑性。

航运联盟对货主是最大的利好

从集装箱运输发展的历史来看，被贪婪驱使的船公司总是在不断的造大船并希望获得超额利润，但不幸的是总是伤害到了自己。能看到的现实是集装箱运价因为技术进步和船舶大型化等因素总体向下。在金融危机的这几年，航运企业走在生死的边缘为货主提供超低价的服务，以极大的奉献精神支撑经济复苏。航运联盟使得船公司能够在更低的成本下运营，也就更有可能给货主让利。2013年以来，船厂承接了大量以绿色低碳为噱头的船舶，如果这些船真能够比现有船舶节省30-40%的能耗，那么未来可能加速低能效船舶的淘汰，并给予市场运价上升以支撑。如果这些船在运营中仅仅能够比现有船舶节省10-15%的能耗，那么未来航运市场复苏将更为遥远。不久的将来几十艘1.8万TEU的3E级船舶下水，尽管能够大大降低单箱成本，但对运力过剩的市场却是毒药。航运市场不好，恰恰是货主的最大利好。

航运联盟内部存在分化的可能

2M联盟是企业联合的松散形式。在没有得到联盟伙伴同意的情况下，某些经营活动可能无法自由开展，联盟使得联盟成员丧失部分独立性和经营的灵活性，可能失去一些商机。同时，合作伙伴在自定价格谋求自身的利润最大化时，

'collusion pricing'". From the international experience, the monopoly charges are often "to be justified", and completely unable to find the internal logic consistency.

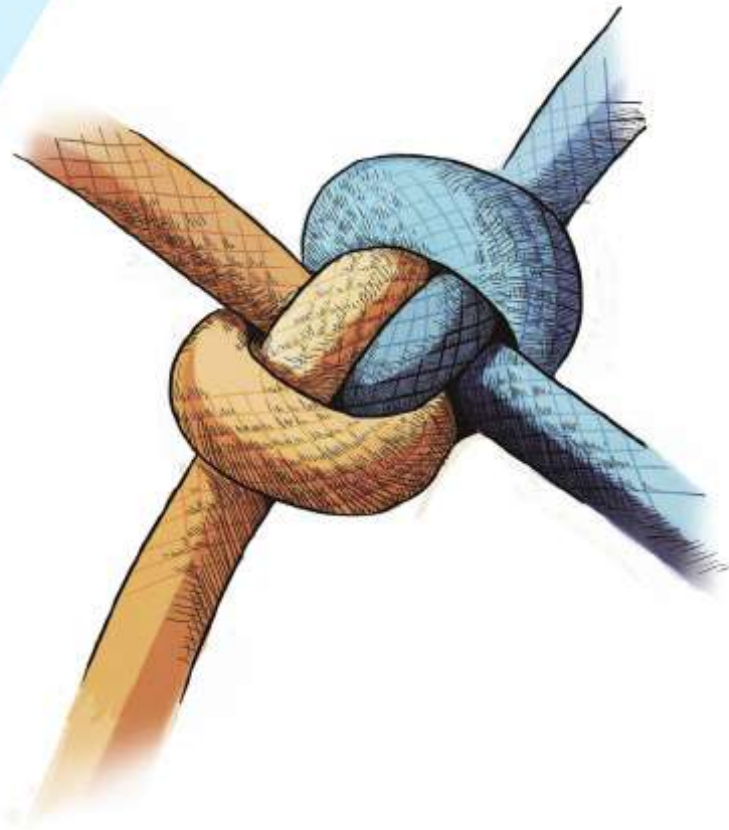
3. The shipping alliance is the biggest benefit for the owners.

From the development of container transport history, the greed driven ship companies have been constantly making large ships and hoping to obtain excess profits, but unfortunately always hurt them. The reality as can be seen is the container freight rates are going down because of technical progress and of large vessels and other factors. In the financial crisis of the past few years, shipping enterprises in the edge of life and death have to provide ultra low-cost services for shippers and support the economic recovery with great dedication. The shipping alliance not only makes shipping companies operate at lower costs, but also is more likely to give benefits to owners. Since 2013, the shipyards have undertaken a large number of vessels with green low carbon as a gimmick. If the energy consumption of these vessels can really save up to 30-40% less than the existing ships, the ships of low efficiency will be quickly eliminated in the future and support the market price rise. If the energy consumption of these ships in operation can only save up to 10-15% less than the existing ships, the future shipping market recovery will be far more distant. In the near future, dozens of 3E ships of 18000 TEU will be launched. Although they are able to greatly reduce the cost of a single container, they are poisonous to the excess capacity market. The stagnant shipping market is the greatest benefit for the owners.

4. There exists a possible split within the shipping alliance.

The 2M Alliance is a loose form of business combination. Without either of alliance partners' consents, some business may not be freely carried out, and if either of the alliance members losses part of its independence and flexibility of operations, it may lose some business opportunities. At the same time, when the other partner seeks to maximize its profits and set the price of its own, it often cannot take into account of equality and efficiency and then the cracks will arise inside of the alliance. If the specified benefit distribution scheme within the alliance is not fair, the alliance members be greatly affected to make their full play thus making the alliance lose its vitality. The unfair benefit distribution is the main cause to break up the alliance. Moreover, their specific respective operating characteristics, enterprise cultures and management systems may also discourage the alliance from operating for a long time. When the shipping market enters the boom period and the cost is no longer the key factor in the shipping competitiveness, the shipping alliance will weaken the internal cohesion and may dissolve itself.

Generally speaking, the shipping alliance can improve the operational efficiency, and its organization cost is far lower than that of merging



往往造成平等与效率无法兼顾，并使得联盟内部产生裂痕。如果联盟内部的分配方案规定不够公平，则影响各联盟成员公司积极性的充分发挥，使联盟失去活力。因联盟产生的利益分配如果不公平，也是拆散联盟的动因。而且，联盟成员在各自经营特色、企业文化和管理体制上的冲突也可能阻碍联盟的长久运行。当航运市场进入景气区间，成本不再是决定航运公司竞争力的关键因素时，航运联盟的内部凝聚力将减弱并可能解散。

总体来看，航运联盟既提高了企业运行效率，又使得组织成本大大低于几家企业合并而产生的组织成本，是在当前经济社会条件下的最佳的企业组织形式。航运联盟可进可退的灵活性正体现其组织方式的优势，而为了规模经济生拉硬拽地搞公司合并，新产生的企业组织成本有可能完全吞噬因合并而产生的规模经济效应，看得见的例子是中外运与长航的合并。

航运联盟将催生新的港口格局

有观点认为，航运联盟相对于之前的单个公司而言具有较大的市场份额，这将使航运公司在与码头进行合同谈判时处于非常强势的地位。其实，航运公司与码头公司之间的关系，并不是如大家所认为的谁的规模大谁就有话语权。码头公司之所以没有要价能力，是因为周边有相似的码头与其竞争。码头公司话语权的丧失，与其说是航运公司话语权过强，不如说是码头能力过剩导致的要价空间下降。

亚欧线与太平洋航线上的船舶大型化，将改变干线港与支线港的布局，进而使得港口集中化趋势加强，“强者更强、弱者更弱”的马太效应在港口领域将更为突出，后发港口反超成熟港口的机会将变得更加渺茫。

反垄断的规则没有令人信服的依据

欧盟的反垄断的红线为什么是40%而不是其他？不同行业、不同国家和不同发展阶段这个市场占有率的红线都一样吗？微软70%的市场份额，也没有看到其不思创新和进取，随意漫天要价。比尔盖茨的经典话语是：“我们离破产只有18个月”。在操作系统中如此具有“垄断力”的企业为什么坚持不懈地为满足消费者而不断创新呢？为什么没有看到其坐享垄断利益呢？这是因为一旦它停滞不前，后来者就可能赶超。

several enterprises, so it is the best organizational form in the current economic and social conditions. The organizational advantage is fully embodied in its flexibility of being free to go forward or back out, but a reluctant merger is made for the so called scale, the newly merged organization cost may completely engulf any benefit the scale economic effect produces by merging. The visible example is the merger between Sinotrans and CSC.

5. The shipping alliance will breed a new port pattern.

A viewpoint thinks that the shipping alliance has a larger market share compared with a single company before, so it will be in a very strong position in the contract negotiation with docks. In fact, the relationship between shipping companies and terminal companies is not as you think: the larger in scale a company is, the larger voice it will have. The reason why the dock company is unable to ask a price is because of the competitions from the surrounding similar docks. The loss of voice from terminal companies is more due to the decline of price-asking space resulting from the dock excess capability than due to the stronger voice from shipping companies.

Large scale vessels running along the Asia and Europe routes and Pacific routes will change the layout of trunk ports and feeder ports, and then the port centralized trend is to be strengthened. The "Matthew effect -- the strong stronger, the weak weaker in the port areas will be more outstanding, and the opportunities for the new ports to surpass the old will become more impossible.

6. There is no convincing evidence for the anti-monopoly.

Why is the EU antitrust red line set at the 40% but not at any other figure? Is the market share red line same for different industries, different countries and different development stage? Microsoft occupies 70% of the market, but we have not seen that it stops its innovation and enterprising and asks an arbitrary price out of the market. The classic words of Bill Gates are "We have only 18 months away from bankruptcy". Why does the enterprise with such "monopoly strength" in the operating system keep making innovations to meet the consumers' needs? Why does it not sit enjoying monopoly interests? This is because it will be likely to be surpassed by the new once it stops going forward.

The Ministry of Commerce rejects the proposal of P3, continues to employ the long-time used supervision, namely the proactive regulation and supervision. In the background of the transformation of government functions today, the government management is switching to the negative list management and to the regulation and supervision in process and afterwards, so the rejection on P3 is contrary to the transformation of government functions. The European and American governments have released the proposal of

商务部对P3的否决，仍然延用了长期以来的监管方式，即事前监管。在当今政府职能转型的大背景下，政府管理正在向负面清单管理和事中事后监管转变，而对P3的否决却有悖于政府职能转变的大方向。欧美对P3的放行，也是从事后监管出发的。也即，只有行了垄断之实，才应给予惩戒。不能说可能会垄断，所以不允许。

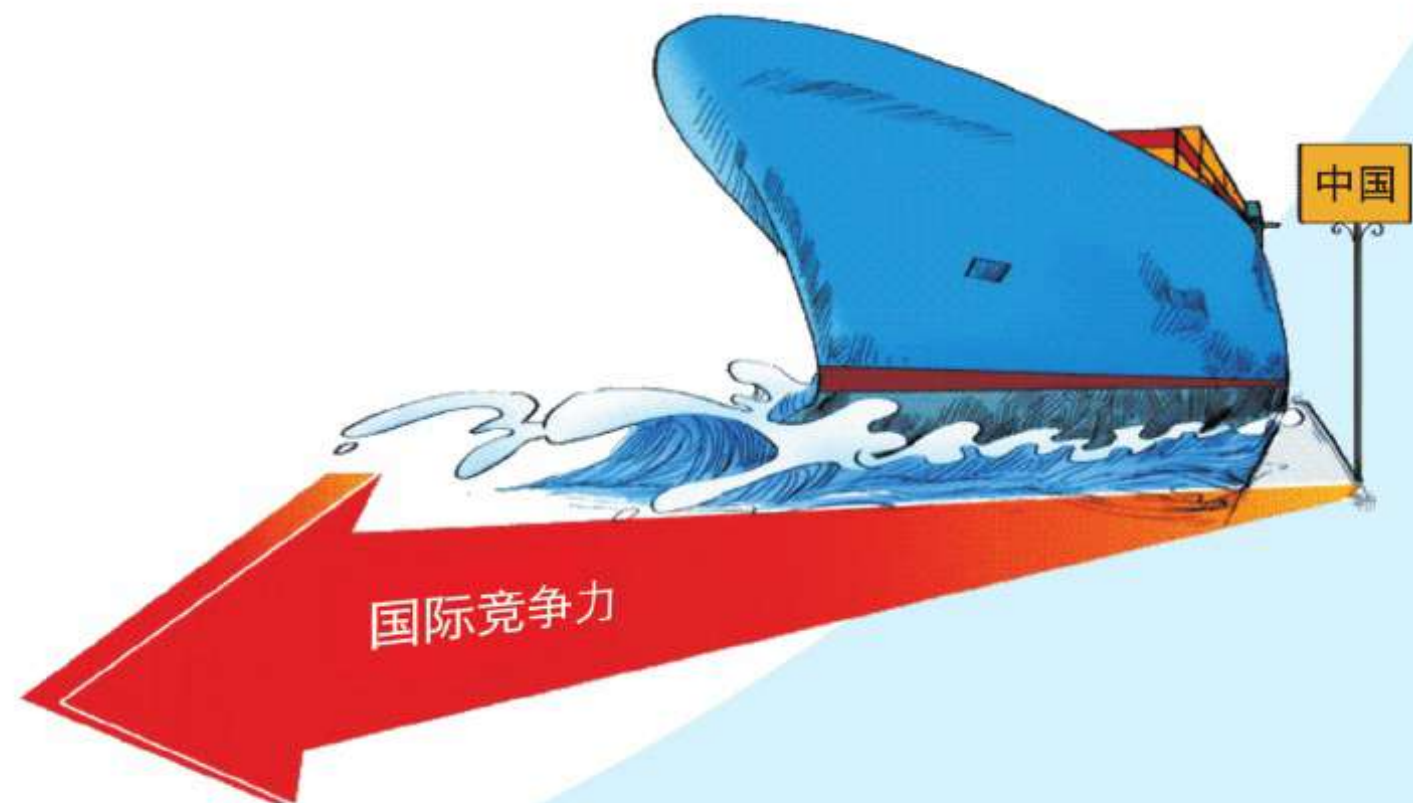
中国的船公司并非无路可走

在当前海运业的大联盟潮迅猛来袭时，中国的航运公司不要寄希望《反垄断法》会对其形成多大的阻碍作用，也不要寄希望于向政府要外资的进入壁垒。市场开放的大趋势不变，贸易自由和市场开放引致的全球分工是提升人类福祉的创举，不应在遇到行业低迷时走回头路。中国航运公司应当做的，就是苦练内功，努力在服务上比竞争对手更好，同时也应如法炮制参与别的联盟应对挑战，并积极创新服务模式和运营模式，从而有机会引领市场趋势而不要总是跟在别的公司后面疲于应对。

P3 from the point of view of supervision afterwards. It is only when the monopoly is proved to be true that the punishment shall be exercised. So we can not prohibit the alliance only for it may result in monopoly.

7. Chinese shipping companies will still have their own ways out.

The moment the shipping industry alliance tide has been rapidly rolling forwards, China shipping companies neither hope that "anti-monopoly law" will hinder the tides nor look up to the government's setting up any foreign entry barriers. If the constant trend of the open market is not going to change, the global division of labor brought about by the free trade and the open market will always be an initiative to promote the human welfare, and so we should not backtrack in the face of the industry downturn. What Chinese shipping companies should do is to increase its competence and make even greater efforts in their services that are better than their competitors. And at the same time, we may also follow suit to participate in other alliances to deal with the challenges, and develop actively the innovative service modes and operation modes so as to have the opportunity to lead the market trend and don't always follow behind other companies struggling for survival.



集运：结构改善 优于去年

CONTAINER TRANSPORT: STRUCTURE IMPROVED AND PERFORMANCE BETTER THAN LAST YEAR

文/夏春晖（航运交易公报）

By Xia Chunhui (Shipping trade Gazette)

上半年，国际航运市场需求未出现明显增长，运力过剩局面持续，运价总体仍在低位波动。在市场低迷的情况下，中国7家集运上市企业业绩颇为喜人，与今年上半年2家盈利5家亏损情况相比，今年上半年4家盈利3家亏损，经营环境优于去年。

经营业绩转好

根据中报，上半年，中海集运（601866.SH）实现营业收入175.50亿元，同比增长8.7%；实现归属于母公司所有者的净利润4.60亿元，相比去年同期亏损12.66亿元有大幅改善。

上半年，东方海外（00316.HK）集装箱运输业务实现营业收入32.24亿美元，较去年同期的30.12亿美元上涨7.04%；实现经营盈利1.35亿美元，较去年同期亏损2263万美元猛涨696.55%，再次回到经营稳健的跑道上。

上半年，万海航运（2615.TW）实现营业收入314.11亿元新台币，较去年同期的286.46亿元新台币增长9.65%；实现利润17.57亿元新台币，较去年同期5.52亿元新台币大幅上涨218.30%。

In the first half of the year, the demand in the international shipping market did not show any obvious growth, the excess capacity situation continued, and the freight rates still fluctuated generally at a low level. In the market downturn, the performances of seven Chinese container transport listed enterprises were quite satisfied. Compared with the performances of the first half of last year when two of them were in the black and five had a deficit, four of them are in the black while three have a deficit in the first half of this year. So the business environment is better than that of last year.

The business performances have turned better.

According to the semiannual report, the first half of the year, CSCL (601866.SH) has achieved an operating income 17,550,000,000 RMB, a year-on-year increase of 8.7%, and realized a net profit of 460,000,000 RMB attributable to the owner of the parent company. Its performance has been greatly improved compared with the same period last year when a loss of 1,266,000,000 RMB was recorded.

In the first half of the year, Orient Overseas (00316.HK) has achieved an operating income of 3,224,000,000 USD in its container transport business, an increase of 7.04% compared with the figure 3012000000 USD of the same period last year, and realized an operating profit of 135,000,000 USD, a great increase of 696.55% over the same period last year's deficit of 22,630,000 USD. So it has once again returned to the steadfast operating road.



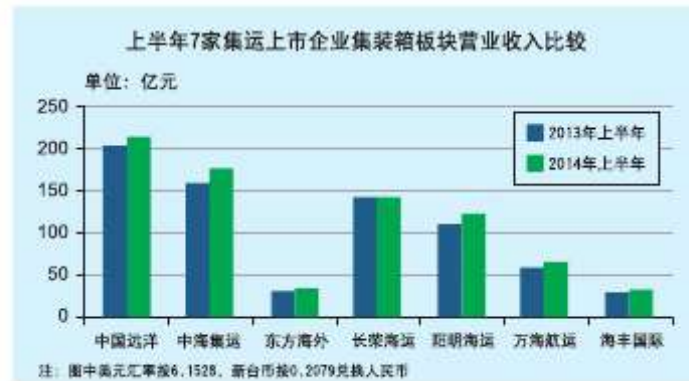
上半年，海丰国际（01308.HK）旗下集装箱运输业务实现营业收入5.03亿美元，较去年同期的4.71亿美元小幅增长6.79%；实现营业利润3028万美元，较去年同期的1819万美元大幅上涨66.47%。

上述4家盈利企业中，东方海外和万海航运盈利增幅巨大，均超200%。除此，3家亏损企业中，中国远洋（601919.SH）和阳明海运（2609.TW）的亏损均在收窄，只有长荣海运（2603.TW）的亏损在扩大。

上半年，年初摘帽的中国远洋旗下集装箱及相关业务实现营业收入214.28亿元，同比增长5.3%；实现营业利润-5.56亿元，实现净利润-14.42亿元，实现归属于母公司所有者的净利润-14.63亿元，相比去年同期归属于母公司所有者的-22.36亿元，亏损幅度收窄。

上半年，阳明海运旗下集装箱运输业务实现营业收入588.86亿元新台币，较去年同期的530.21亿元新台币增长11.06%；实现营业利润-16.83亿元新台币，较去年同期亏损49.83亿元新台币大幅收窄。

上半年，长荣海运旗下集装箱运输业务实现营业收入680.24亿元新台币，较去年同期的681.32亿元新台币小幅下降；实现营业利润-54.89亿元新台币，较去年同期亏损41.21亿元新台币有所恶化。



In the first half of the year, Wan Hai Lines (2615.TW) has achieved an operating income of 31,411,000,000 NTD, a growth of 9.65% over the same period last year's record of 28,646,000,000 NTD, and achieved a profits of 1,757,000,000 NTD, a sharp growth of 218.30% compared with the same period last year's 552,000,000 NTD.

In the first half of the year, SITC International (01308.HK) has achieved an operating income of 503,000,000 USD in its container transport business, a slight increase of 6.79% compared with the same period last year's 471,000,000 USD, and realized an operating profit of 30,280,000 USD, an increase of 66.47% compared with the same period last year's 18,190,000 USD.

In the four profitable enterprises, Orient Overseas and Wan Hai Lines have reported a huge profit growth of over 200%. In addition, in the unprofitable enterprises, China Ocean Shipping (601919.SH) and Yang Ming Marine Transport (2609.TW) have narrowed their loss. Only Evergreen Marine (2603.TW) has reported its loss in the expansion.

In the first half of the year, China Ocean Shipping has obtained a revenue of 21,428,000,000 RMB in its container transport and related businesses, a year-on-year increase of 5.3%, realized an operating profit of -556,000,000 RMB and a net profit of a net profit of -144,200,000 RMB attributable to the parent company owners, which narrowed the loss compared with the same period last year's -223,600,000 RMB, and the loss has been narrowed.

In the first half of the year, Yang Ming Marine Transport has obtained an operating income of 58,886,000,000 NTD in its container transport business, a growth of 11.06% compared with the same period of last year's 53,021,000,000 NTD, and achieved an operating profit of -168,300,000 NTD, which shapely narrowed the loss compared with the same period of last year's -4,983,000,000 NTD.

In the first half of the year, Evergreen Marine has obtained an operating income of 68,024,000,000 NTD in its container transport business, a slight decline compared with the same period of last year's 68,132,000,000 NTD, and achieved an operating profit of -5,489,000,000 NTD, which took a turn for the worse compared with same period of last year's -4,121,000,000 NTD.

The increase of freight volume is sped up.

According to the last year's semiannual report, the container transport demand was not improved significantly for these listed enterprises, and the freight turnover dropped significantly for Orient Overseas and CSCL. Though the rise of volume was recorded for China Ocean Shipping, the main cause is that its capacity increased. Therefore, this year has seen the great improvement in freight volume for each of the company.

In the first half of the year, the freight volume of Orient Overseas is 2,803,350 TEU, a year-on-year growth of 10%, a 5% rise in delivery rate and an increase of 4% in the overall income. According to the last year's semiannual report, the freight volume went down greatly in the

货量增长提速

根据去年中报，几大主要集运上市企业的集装箱运输需求没有明显好转，东方海外和中海集运的货运周转量均有明显下跌，中国远洋运量虽上升，主因是运力增加；今年各家企业货量情况大有改善。

上半年，东方海外货运量280.335万TEU，同比增长10%，运载率上升5%，带动整体收入增长4%。根据去年中报，太平洋航线、亚欧航线、大西洋航线的货运量均比2012年有所下跌，仅亚欧区内/澳亚航线微涨1%。今年中报显示，太平洋航线货运量同比增长6%；亚欧航线货运量同比增长16%，该航线因欧洲各国经济逐步复苏及增加存货而受惠；亚洲区内/澳亚航线货运量同比增长12%；大西洋航线货量依然“跌跌不休”，同比下跌1%。

上半年，中国远洋实现集装箱运量448.933万TEU，同比增长9.2%。运量增长的主要原因是通过调整运力布局，优化航线网络，加大新兴市场投入和高附加值货的揽取力度，拓展增收创效空间，进而实现货运量的增长。

上半年，海丰国际营业收入增加的主要原因之一即货运周转量达到76.62万TEU，较去年同期的73.60万TEU上涨4.1%。

上半年，中海集运实现集装箱运量395.33万TEU，同比增长1.4%。中海集运在巩固内贸市场份额基础上，合理调配内贸航线运力投放，同时根据市场需求灵活调整外贸航线运力布局，致外贸航线运量同比增长5.2%。其中，太平洋航线完成64.91万TEU，较去年同期的64.01万TEU增长1.4%；欧洲/地中海航线完成76.03万TEU，较去年同期的72.20万TEU增长5.3%；亚太航线完成93.16万TEU，较去年同期的87.86万TEU增长6%；国内航线完成156.24万TEU，较去年同期的162.35万TEU下降3.8%。

燃油成本普降

东方海外、中国远洋、中海集运、万海航运等集运上市企业均在中报中将业绩好转归功于成本的有效控制。

上半年，东方海外运力同比增长3%，货运量同比提升10%，在运力与载货量俱增的基础上，燃油成本同比减少8%。这与目前油价走低有关，上半年油价平均每吨595美元，去年

Pacific routes, the Asia European routes, the Atlantic routes in 2012, with only the Asia Europe zone routes/the Australia Asia routes gaining a rise of 1%. This year's semiannual report shows that the freight volume grew 6% in the Pacific routes; 16% in the Asia Europe routes for a gradual economic recovery has been occurring in the European countries, which has brought about an increase in inventories and benefits; a growth of 12% in the Asia zone routes/the Australia Asia routes; but a decrease in the Atlantic routes.

In the first half of the year, China Ocean Shipping has achieved the carrying capacity of 4,489,330 TEU, a year-on-year growth of 9.2%. The main reason is that the capacity layout has been adjusted, the route network optimized, the investment into the emerging markets increased, the resources of high value added goods expanded and great efforts made to create more income-earning space.

In the first half of the year, one of the main reasons why SITC International has obtained an increase in its international business income is that its freight turnover has reached 766,200 TEU, a growth of 4.1% compared with the same period of last year's 736,000 TEU.

In the first half of the year, CSCL has obtained a freight container volume of 3,953,300 TEU, a year-on-year growth of 1.4%. On the basis of consolidating its domestic market share, CSCL has made a reasonable allocation of internal trade routes for its transport capacity, and at the same time, according to the market demand, it has flexibly adjusted its capacity layout for its foreign trade routes, which has brought about a freight volume growth of 5.2% in foreign trade routes. Among them, the freight volume of 649,100 TEU was along the Pacific routes, an increase of 1.4% compared with the same period of last year's 640,100 TEU; 760,300 of TEU along the European-Mediterranean routes, an increase of 5.3% compared with the same period of last year's 722,000 TEU; 931,600 TEU along the Asia Pacific routes, an increase of 6% compared with the same period of last year's 878,600 TEU; 1,562,400 TEU along the domestic routes, a decrease of 3.8 compared with the same period of last year's 1,623,500 TEU.

Fuel cost has dropped generally.

The semiannual reports of Orient Overseas, China Ocean Shipping, CSCL, Wan Hai Lines and other freight transport listed companies show that they owe all their improvements of achievements to the effective control of costs.

In the first half of the year, Orient Overseas transport capacity has obtained a year-on-year growth of 3%, its freight volume a year-on-year increase of 10%, but its fuel cost a year-on-year decrease of 8%. This relates much to the current lower oil prices, for the oil in the first half of the year is about \$595 per ton on average, but it was \$626 per ton at the same period last year. On the basis of this, Orient Overseas can effectively control its fuel cost and thus its shipping costs.

In the first half of the year, China Ocean Shipping's fuel consumption has fallen 10.5% and fuel expenditure fallen 17.5% by putting more

同期为每吨626美元，基于此东方海外的燃油成本得以有效控制，为其控制航运成本出力。

上半年，中国远洋在自营运力和货运量同比增长的情况下，通过加船减速、集中采购等节油措施，燃油消耗量同比下降10.5%，燃油支出同比下降17.5%，为其控制成本，减少亏损作出贡献。

上半年，中海集运的船舶及航程成本为57.69亿元，同比下降15.5%，主要是燃料支出减少所致。燃油支出34.99亿元，同比下降20.4%。国际油价略有降低，致燃耗单价同比下降6.2%，加之继续强化节油措施，燃料消耗同比减少15.2%。

上半年，万海航运受惠运价调涨、燃油成本下降，营业利润大涨218.30%。万海航运认为国际航运市场持续复苏，除中国GDP略微下调，其他国家GDP都在上涨，亚洲区的货量也随景气向上。上半年近洋线运价持续小幅调涨，加上船用燃油价格缓步向下，油料成本每吨同比减少22美元，带动获利明显成长。

运力结构优化

上半年，集运市场优于去年同期，除燃油成本降低，还包括运力结构优化。

上半年，中海集运继续致力于船队结构的优化调整。前6月接收6艘1万TEU型新船，加强老旧船舶、高油耗船舶的退租及报废，同时根据船队结构及航线经营需求，以较低价格租入高效能船舶。

上半年，阳明海运进一步落实绿色航运概念，持续推动船龄年轻化，努力优化船队结构，船队平均船龄仅7.07年，优于同业平均10.7年水平。随着未来15艘1.4万TEU型船陆续加盟，在营运成本及船舶能源使用效率上，都将使阳明海运在大船时代的竞争中具备一定优势。

上半年，中国远洋加快船舶拆旧造新，调整船队结构。虽然船舶拆解带来营业外支出的增加，但通过对老旧船舶实施退役，订造节能高效的新船型，自有船平均船龄有所下降，船舶节油、环保水平有所提升，整体运力结构进一步优化，有利于提高船队整体经营竞争力。前3月，中国远洋共拆解集装箱船12艘，5—6月出售退役船舶8艘，其中4艘为集装箱船。

vessels and slowing down their speed and other fuel saving measures such as centralized purchase while its self-supporting capacity and freight volume were both growing compared with the same period, which contributes a lot to its cost control and loss reduction.

In the first half of the year, the cost of CSCL's vessels and voyages is 5,769,000,000 RMB, a year-on-year decline of 15.5%, which is mainly due to the decrease of fuel expenditure. Its fuel expenditure is 3,499,000,000 RMB, a year-on-year drop of 20.4%. A slight decrease of the international oil prices will give rise to 6.2% of consumption unit-price decline. In addition, it keeps strengthening the oil saving measures, and so its fuel consumption has reduced 15.2% year on year.

In the first half of the year, Wan Hai Lines has benefited from the fuel price decrease and lower freight fuel costs, so its operating profit has increased 218.30%. Wan Hai Lines believes that the international shipping market is continuing to recover, the GDPs of other countries are on the rise except that of China, and the freight volume of the Asian region is booming. In the first half of the year, the freight rate along the coastal waters keeps rising slightly. In addition to the gradual slight decrease of fuel prices, its fuel cost has reduced \$22 per ton, which has brought about a significant rise of its benefit.

The structure of freight capacity is optimized.

In the first half of the year, the shipping market is better than that in the same period last year, and in addition to the lower fuel cost, the structure of the freight capacity is optimized.

In the first half of the year, CSCL has kept optimizing and adjusting the fleet structure. In the first six months, it has received six new vessels of 10,000 TEU, thrown a lease of and declared worthless the old and the high fuel consuming vessels, and leased high performance ones at lower prices according to the fleet structure and route management demands.

In the first half of the year, Yang Ming Marine Transport has further implemented the concept of green shipping, continued to promote the upgrading of its vessels, made efforts to optimize the structure of the fleet, so its average boat age turned out to be only 7.07 years, which is better than the industry average age of 10.7 years. With the coming of fifteen vessels of 14,000 TEU in the future, Yang Ming Marine Transport will, in the operating costs and the vessel energy efficiency, gain some advantage in competition.

In the first half of the year, China Ocean Shipping has sped up the demolition of the old vessels and building the new and adjusted the fleet structure. Despite the increase of non-business expenditure brought about by vessel dismantling, it will help improve the overall management of the fleet competition through the implementation of the out-of-commission of old vessels and the custom-making of energy-saving and efficient ones, the decrease of its own average boat age, the ship oil saving, the improvement of environmental protection and further optimization of the overall capacity structure. Before March, China Ocean disassembled twelve container vessels, and in

上半年，随着长荣海运的8452TEU级L型船持续交付，加上另有1.4万TEU型船加入船队，长荣海运规划自5月起调整船队配置，将L型船投入泛太平洋航线。在亚欧线和泛太平洋航线等主要航路上，长荣海运船队的单位成本竞争力将进一步加强。据长荣海运规划，接下来还会有美西、美东航线的船队升级计划，预定于5月后陆续发布。

据悉，长荣海运的中国—太平洋西南航线，将开始导入L型船，新的船队配置于5月20日起自青岛港启航，投入6艘8452TEU型船和1艘8073TEU型船，靠泊港口包括青岛、上海、宁波、洛杉矶、奥克兰、东京港后返回青岛港。长荣集团是在2010年船价趋于合理化时，启动新造船计划，陆续订造30艘L型船，并租用5艘8800TEU型和10艘1.38万TEU型船。为进一步优化船型结构，配合CKYHE联盟的船队需求，长荣海运近期签约承租10艘1.4万TEU型船，随着这些新船交付，长荣海运将逐步退还到期租船，使船队更年轻化，整体航线上的船队调度更有弹性。

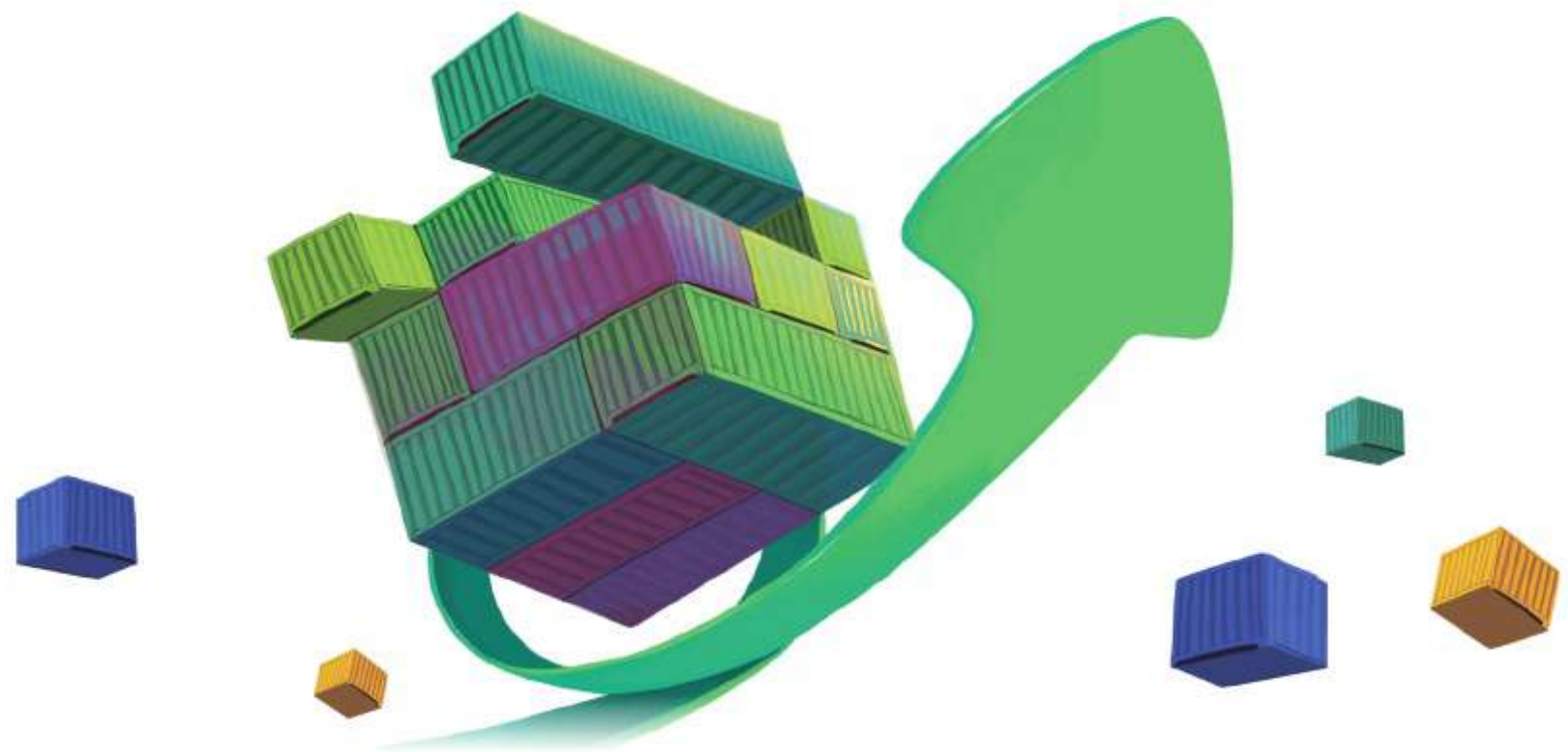
上半年，尽管7家集运上市企业业绩回暖，货量、燃油成本以及运力结构都有喜人表现，但市场依然存在运价持续低迷、供需失衡等顽固问题。如中海集运尽管获得盈利，但主要原因在于其售卖相关资产所致。下半年集运市场是否会继续回暖，还需持谨慎。

May and June, its eight vessels were out of commission including four container vessels.

In the first half of the year, with the delivery of the vessel of 8452 TEU and another of 14000 TEU joining the fleet, Evergreen Marine has planned to adjust the fleet configuration from May, putting L type vessels into the Pan Pacific routes. In the main routes such as the Asia European routes and the Pan Pacific routes, the unit cost competitiveness of Evergreen Marine fleet will be further improved. According to its planning, some fleet upgrading plans for American west and east routes are scheduled to be released in May.

It is reported that Evergreen Marine would introduce L type vessels in the China-Pacific southwest routes, and the new fleet configuration of six vessels of 8,452 TEU and one of 8,073 TEU would set sail on May 20 from Qingdao Port, berthing at ports such as of Shanghai, Ningbo, Los Angeles, Oakland and Tokyo and then returning to Qingdao. Evergreen Group started its new shipbuilding plan in 2010 when the shipbuilding price was reasonable, custom-made thirty type L ships and rented five of 8,800 TEU and ten of 13800 TEU. For further optimization of the structure, with the CKYHE Alliance Fleet demands, Evergreen Marine recently signed a leasing of 10 vessels of 14000 TEU. With these new vessels coming, it will gradually return those at term, which will make its fleet much younger and more elastic in scheduling its routes.

In the first half of the year, although the seven freight transport listed enterprises have obtained recovery performances and their freight volume, fuel costs and capacity structures have been satisfactory in performance, the freight rate remains in the doldrums and the imbalance between supply and demand and other stubborn problems still exist. Though CSCL gained some profits, it is mainly because of the sale of its relevant assets. We also need to be cautious to whether the freight market continues to pick up in the second half of the year.



大船催生竞争新格局

LARGE VESSELS GIVE BIRTH TO A NEW COMPETITION PATTERN

文/刘俊 (航运交易公报)

By Liu Jun (Shipping trade Gazette)



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中海环球号



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马士基·迈克-凯尼·穆勒号



2006年08月
艾玛·马士基号



8年前的8月份，马士基航运名为“艾玛·马士基”号的1.55万TEU型船在丹麦奥登塞船厂亮相，成为当时全球最大的集装箱船。

1年前的7月份，马士基航运名为“马士基·迈克-凯尼·穆勒”号的1.8万TEU型船投入亚欧航线运行，成为目前全球最大的集装箱船。

今年11月，中海集运名为“中海环球”号的1.9万TEU型船将投入运营，届时将成为全球最大的集装箱船。

越来越大和越来越多的集装箱船以及保持长期低速增长的班轮市场将成为班轮市场的新常态。如何应对、生存、发展？班轮公司不断追问以寻求答案。

于是乎10年间，班轮公会消亡，联营体重新兴盛。从不结盟的马士基航运从P3网络辗转至2M，市场领头羊都在结盟，发出的信号很明显。于是，G6的合作航线进一步覆盖到太平洋航线；长荣海运加入CKYH变成CKYHE；落单的达飞轮船携手中海集运、阿拉伯航运变为O3。

竞争新格局已经出现。

In August eight years ago, Maersk Line's "Elmar Maersk" a vessel of 15500 TEU made its debut in Odense Shipyard, Denmark, and it had become the world's largest container ship at that time.

In July one year ago, Maersk Line's "Maersk Mike Kinney Muller" a vessel of 18000 TEU was put into operation in the Asian-European routes, and it became the world's largest container ship then.

In November this year, CSCL's vessel named "CSCL Sea World" of 19000 TEU will be put into operation, and thus it will become the world's largest.

The fact that the shipping market will maintain in the long run a low growth and larger and larger, more and more container ships will come into being will become a new and normal trend in the market. How to deal with it, survive and develop in it?

Then in the next ten years, the Shipping Guild will die and the shipping affiliation body will flourish again. Maersk Line that has never aligned has now turned from the P3 network to 2M, so the alliance of the market leader has sent off an obvious signal. Then G6 Cooperative Route further covers the Pacific routes; Evergreen Marine has joined CKYH, which then becomes CKYHE; the single CMA CGM has to join hands with CSCL and Arabia Shipping so that O3 comes into being. The new pattern of competition has appeared.

Shipping companies keep asking for the answer.



四大联盟初显峥嵘

9月10日, 中海集运发布公告称, 将与达飞轮船、阿拉伯航运在亚欧航线(包含西北欧、地中海航线)、太平洋航线(包含美东、美西航线)进行联盟经营, 联盟名为“Ocean Three”(O3)。

海通证券分析员姜明分析认为, O3三方基本投入所有可用于美欧两大主干航线的大型集装箱船, 预计运营后, 联盟成员将有能力在亚欧航线、太平洋航线分别提供8班/周和7班/周的服务。长期来看, O3的组建避免了中海集运及其他两家班轮公司在班轮联盟时代下“落单挨打”的局面, 其合作紧密度亦远高于中海集运现有的航线合作形式, 三方有望通过整合航线资源, 提升效率和盈利能力。

至此, 班轮市场格局初定: 马士基航运和地中海航运组建2M; 美总轮船、赫伯罗特、现代商船、商船三井、日本邮船和东方海外组建G6; 中远集运、川崎汽船、韩进海运、阳明海运和长荣海运组建CKYHE; 达飞轮船、中海集运和阿拉伯航运组建O3。四大联盟初显峥嵘。

四大联盟囊括全球17家班轮公司, 未加入联盟的班轮公司仅剩两家: 以星航运和汉堡南美。

上海海事大学教授徐剑华对《航运交易公报》记者表示, 对于以星航运和汉堡南美而言, 如果不考虑收购兼并, 未来只有两条出路: 寻求合作加入联盟或者转型成为区域性承运人。“既然没有能力做全球承运人, 那就到最适合自己的位置上, 照样也能生存得很好。”但是, 以星航运和汉堡南美即使考虑加入联盟, 也需要看人眼色。“2M和O3的成员都拥有1.8万TEU型船, 也就是说拥有同等规模的大船才有可能进入这两大联盟。因此, 以星航运和汉堡南美加入G6或者CKYHE的可能性更大一点。”

对于四大联盟的竞争力, 徐剑华认为“差距蛮大”。总体而言, 如果从3条主干航线投入的运力来看, 2M最强, O3最

The four major leagues begin to show their initial prosperity.

On September 10, CSCL released an announcement saying that it would seek an alliance called "Ocean Three" (O3) with CMA CGM and Arabia Shipping in the Asia Europe routes (including the northwest Europe, the Mediterranean Sea routes) and the Pacific routes (including America east and west routes).

Jiang Ming, an analyst from Haitong Securities, believes that the three parties with O3's large container vessels put into two main routes of America and Europe are expected to have the capacity of providing services of eight runs per week and of seven runs per week respectively in the Asia Europe routes and the Pacific routes. In the long run, the formation of O3 will avoid the "straight fight" situation faced with CSCL and the other two shipping companies in the alliance era. The close cooperation is much higher than CSCL's existing cooperative forms, and the three parties are expected to improve efficiency and profitability through the integration of route resources.

So far, the shipping market has been initially shaped: Maersk Line and Mediterranean Shipping forms 2M; APL, Hapag Lloyd, Hyundai Merchant Marine, MOL, Nippon Yusen and Orient Overseas constitutes G6; COSCO, Kawasaki Steamboat, Hanjin Shipping, Yang Ming Marine Transport and Evergreen Marine builds CKYHE; CMA CGM, CSCL and Arabia Shipping makes O3. The four major leagues begin to show their initial prosperity.

The four major leagues include seventeen global shipping companies, nearly all the container shipping companies in the world except Zim and Hamburg Sud.

Professor Xu Jianhua from Shanghai Maritime University says to a Shipping Exchange Bulletin reporter that there are two options in the future for Zim and Hamburg Sud if they do not consider the merger and acquisition: to seek cooperation and join the alliance or transform themselves into regional carriers. "If they do not have the ability to be global carriers, it is most suitable for them to find their own positions and then they still can survive well." However, if they even consider joining the alliance, they will have to act in accordance with the will of others. "Members of the 2M and O3 have 18000 TEU ships, i.e., it is impossible to join them if you do not possess the same sized vessels. Therefore, it is more possible for Zim and Hamburg Sud to join G6 or CKYHE."

As for the competitiveness of the four major leagues, Xu Jianhua believes that there is a "great deference" between them. In general, 2M is the most powerful and O3 is the least in freight capacity put in the three main routes. "But we evaluate the competitiveness not only from the general scale of transport capacity and the average capacity size but also from the close relationship, time and other factors."

Xu Jianhua says that 2M is the closest in its relationship, since the

弱。“但我们评价联盟竞争力的大小, 不仅要总运力规模、平均运力大小来看, 还要从联盟的紧密程度、时间等因素考虑。”

徐剑华表示, 从联盟的紧密程度来看, 2M最为紧密, 联盟双方签订10年的联营合约, 覆盖全球3条主干航线, 时间长、首尾相接, 毫无疑问最强。G6在航线覆盖上也希望做到与2M一样, 覆盖3条主干航线, 如果相关监管机构审批通过, 其竞争力应该会进一步增强。CKYHE算是较为松散的联盟, 联盟成员提前半年就可以申请退出, 约束力不强。此外, 航线覆盖面较少, 仅在亚欧航线和亚洲至美东2条航线上合作。尽管从单家企业而言, 决策和经营较自由, 但从另一方面来说, 会削弱联盟体的竞争力。O3的初步合作年限是2.5年, 之后若三方没有意见自动续约, 要退出联盟也须提前半年申请, 相较CKYHE较为紧密。但是其合作航线并未包含大西洋航线, 航线覆盖上劣于2M和G6。

班轮市场的联盟经营是否会加速寡头聚集? 对此, 中国社会科学院国际法研究所国际经济法研究室副主任张文广对《航运交易公报》记者表示: “未必, 市场变幻无常, 三十年河东三十年河西, 关键看经营能力能否跟上。未来的航运市场肯定多元化格局并存, 达到一种新的平衡。”

two parties have signed a ten-year joint venture contract covering three global trunk routes. Therefore, there is no doubt that it is the strongest for their long term nose-to-tail cooperation. G6 hope to cover three global trunk routes as 2M do, and it should further enhance its competitiveness if obtaining the approval from the relevant regulatory authorities. CKYHE is a loose alliance; its members may apply for withdrawal half a year in advance, so there is little binding on its members. In addition, its route coverage is smaller only in the Asia Europe routes and two Asia east routes in cooperation. Although it is freer for a single family enterprise in decision-making and management, this will weaken the competitiveness of the alliance. O3 has a preliminary cooperation period of 2.5 years, which can be automatically renewed when the period is expired on the basis of the agreement of the members, if any member wants to secede from the alliance, it must apply six months in advance, and in contrast, CKYHE is closer in cooperation. But the routes in cooperation do not include the Atlantic routes, so the route coverage is inferior to 2M and G6.

Will the shipping market alliance speed up the oligarch aggregation? In this regard, Deputy Director Zhang Wenguang, from Chinese International Law Academy of Social Sciences Institute of International Economic Law Research Office, says to a Shipping Exchange Bulletin reporter: "No, it won't. The market is changing all the time. It is full of ups and downs. It all depends on whether they can enhance their business abilities. The future shipping market will certainly be in a form of diversification to reach a new equilibrium."

It is up to HAPAG-LLOYD to make a choice: to build large vessels or not.

Speaking of the competitiveness of the four major leagues, Xu Jianhua says: "Possessing large vessels is actually competitive. I think that vessels of 18000 TEU and the above can be referred to as large vessels. If according to this definition, at present only five companies have such ships: Maersk, MSC, CSCL, Arabia Shipping and CMA CGM (which owns a vessel of 17700 TEU, nearly up to the standard)."

Xu Jianhua analyses that a shipping company with large vessels is deferent in mentality from one without them. "The companies with large vessels do not want to share the benefits of scale economy with other shipping companies, unless they themselves have such ships, though the companies without large vessels hope to share the benefits. Why is the industry sure that CMA-CGM will choose CSCL and Arabia Shipping for cooperation? The answer is very practical is clear, for the three parties all have large vessels."

As for the present development tendency of the four major leagues in the shipping market, Xu Jianhua says: "If the a shipping company announces to custom-make a vessel of 18000 TEU and above, it means that the league members are deferent in options in custom-



赫伯罗特：造与不造

在谈及四大联盟竞争力大小时，徐剑华表示：“大船实际上也是竞争力的一个方面。我认为1.8万TEU及以上型船才能称之为大船。如按此定义，目前只有5家班轮公司拥有大船：马士基航运、地中海航运、中海集运、阿拉伯航运、达飞轮船（1.77万TEU型，勉强达标）。”

徐剑华分析，有大船的班轮公司与没有大船的班轮公司心态是不一样的。“有大船的班轮公司不愿意与其他班轮公司分享大船的规模经济效益，除非对方本身也有大船；没有大船的班轮公司希望分享大船效益。为什么业内笃定达飞轮船会选择与中海集运、阿拉伯航运合作，实际很清楚，三方都拥有大船。”

对于班轮市场目前四大联盟的发展趋势，徐剑华表示：“如果接下来有班轮公司宣布订造1.8万TEU及以上型船，也就意味着联盟对订造大船的意见不统一，所以才会单独订造。也意味这家班轮公司可能会‘跳槽’，联盟间有重新组合的可能。”

徐剑华认为，目前四大联盟中最不稳定的因素来自赫伯罗特。这家德国班轮公司从其兼并南美轮船的过程来看，“非常迫不及待要扩大规模”。市场还有很多传闻表示，赫伯罗特希望重新牵手汉堡南美，甚至还寻求收购一家亚洲班轮公司。“赫伯罗特兼并南美轮船的目的主要是为了上市，这是很明确的。那么，完成上市后，它要寻求进一步发展，就有可能订造1.8万TEU及以上型船。一旦订造大船，赫伯罗特就有可能重新谋求联盟对象，现有联盟格局就会有变化。”

造与不造如何抉择？张文广认为，每家班轮公司都是市场主体，需要根据自身情况去决策，这本就是市场经济的法则。“依法经营，适者生存。就像电商与实体店的竞争，谁的成本更低，服务更好，谁就能获得更多的市场份额。”

徐剑华认为，目前班轮市场还有一两年的缓冲期，到2016年，所有班轮公司都将面临两大挑战：现所有在建的1.8万TEU及以上型船都将投放市场，这是第一大挑战；第二大挑战是巴拿马运河拓宽通行，没有大船的班轮公司将会承受很大压力。

making vessels so that a single member comes out to custom-make such a vessel. It also means that the member is to quit and the alliance may be reorganized.”

Xu Jianhua thinks that the most unstable of the four major leagues is Hapag lloyd at present. The German company "is unable to hold itself back to expand the scale" from point of view of its the process of imerging CSAV. There are a lot of rumors in the market, saying that Hapag lloyd hopes to seize Lloyd Hamburg and even seeks to acquire an Asian shipping company. "It is very clear that Lloyd's merger of CSAV is primarily for the purpose of listing. Then, after the listing, it must seek the further development, so it is possible to order vessels of 18000 TEU and above. Once owning such ships, Hapag Lloyd is likely to seek a new alliance so that the existing alliance pattern will change.”

How to make the choice to build or not to build large vessels? Zhang Wenguang thinks that each shipping company is a main body of the market, and each need make its own decision according to its own situation. This is the rule of the market economy. "Operating in accordance with the law, the survival is the fittest. As E-business's competition with the store, whoever has the lowest cost and provides the best services will be able to gain more market share.”

Xu Jianhua thinks that there are two grace periods at present until 2016 by then all shipping companies will face two challenges: the first big challenge is that all the vessels of 18000 TEU and above being built will be put into the market; the second challenge is that Panama Canal will finishing being widened and so those without large vessels will bear a lot of pressure.

The influence will spread onto other related industries.

In fact, with large vessels of 10000 TEU turning into a new norm in the shipping market, other related industries will have been changing quietly.

For the Panama Canal ship investors and owners, the present time has become a suffering period and they have to decide on what path to follow in the future. The upgrading of the container ships running along the the Asia Europe routes will have been completed, the current mainstream ships will be above 13000 TEU, and part of 8000~1 TEU type ships will be put into the Pacific routes. After the Panama Canal is widened, part of the 13000 TEU may even be cast to the Pacific routes. Therefore, the rentals of ships running along the Panama Canal are gradually declining at present. When the rentals are difficult to restore, these investors and owners are afraid to maintain their operation.

More and more large container ships will make shipping companies select ports with more individualized approaches. Xu Jianhua says: "At

影响波及相关产业

实际上，伴随着大批量万箱船成为班轮市场的新常态，其他相关产业也在悄然发生变化。

对于巴拿马型船的投资商和船东而言，目前已经成为煎熬期，未来何去何从成为必须考虑的问题。亚欧航线上的集装箱船已经完成升级换代，目前主流船型在1.3万TEU以上，而部分8000~1万TEU型船将会被投放至太平洋航线上；巴拿马运河拓宽工程完工后，部分1.3万TEU型船甚至会被投至太平洋航线。因此，目前巴拿马型船租金逐渐走低，当租金跌至难以恢复的状态后，这些投资商和船东恐怕难以维持运营。

越来越大的集装箱船将使班轮公司对挂靠港口的选择更有针对性。徐剑华表示：“目前马士基航运的1.8万TEU型船，前后共有23列集装箱，全球只有5个港口有足够高的桥吊和足够长的壁长进行装卸作业。”除桥吊等基础设施外，班轮公司为发挥最大的规模效益，在为大船选择挂靠港口时，更看重港口的腹地集装箱生成量、地理位置及综合物流服务体系建设等因素。因此，未来全球港口发展将会呈现明显分化状态，有全球性枢纽港，有区域性枢纽港，更多的港口将成为喂给港。

对于造船业而言，在这轮超大型箱船订单蓬发之际，韩国造船企业占得先机，中国造船企业也在迎头赶上。9月初，上海外高桥造船举行其建造的第一艘1.8万TEU型船的下坞仪式，这是目前中国在建的最大集装箱船。对于能够顺应市场需求、不断进行技术创新、提高自身研发实力和产品建造质量、加快对核心技术掌握、着力研发满足环保节能绿色船舶的造船企业而言，在获得订单的同时也增强了自身竞争力。

此外，在超大型箱船的建造热潮中出现越来越多中国金融机构的身影，交通银行、民生租赁等不断参与1.6万TEU及以上型箱船的融资。巨大的资金优势，结合目前船价触底的有利时机，中国金融机构凭借订造超大型船的“东风”开始介入国际航运融资领域，确立竞争优势。为降低风险，中国金融机构目前选择的融资对象多为全球顶级班轮公司。

present, Maersk Line's ships of 18000 TEU have a total of 23 columns of containers in front and at back, and only five ports have bridge cranes high enough and arms long enough to conduct the loading and unloading." In addition to the infrastructure such as bridge cranes, the shipping companies will attach more importance to the factors such as the hinterland container amount, the geographical location and the integrated logistics service system in selecting their named ports in order to gain maximum benefits of scale. Therefore, the global port development will present an obvious differentiation state in the future, and thus there will exist global hub ports and regional hub ports, and many will become more feeding ports.

As for the shipbuilding industry, the South Korean shipbuilders have seized the opportunity in this round of super large container shipbuilding orders, and the Chinese shipbuilding enterprises are catching up. In early September, Shanghai Waigaoqiao Shipbuilding held the dockyard ceremony for its construction of the first ship of 18000 TEU. This is the largest container ship currently under construction in China. We should enhance ourselves to be able to adapt to market demands, continue to carry out technical innovations, improve the R&D strength and product quality, accelerate the master of the core technology and focus on developing and building environment-friendly and energy saving green ships, so that we can not only obtain more orders but also improve our competitiveness.

In addition, more and more financial institutions in China can be seen in the upsurge of the super large container ship construction. For example, the banks such as Bank of Communication and Minsheng Financial Leasing have participated in the financing for building container vessels of 16000 TEU. With the huge financial advantage combined with the favorable opportunity of the present bottom ship price, China's financial institutions have, with the upsurge of building super large vessels, begun to enter the international shipping financing field and establish their competition advantage. In order to reduce the risk, China's financial institutions will currently select the world's top shipping companies as their financing objects.

提升供应链管理水平 建设供应链平台

ENHANCE SUPPLY CHAIN MANAGEMENT LEVEL AND ESTABLISH SUPPLY CHAIN PLATFORM

文/谷欣

By Gu Xin



供应链管理从20世纪90年代开始流行，并成为组织机构在全球市场更具竞争力的关键。那么什么是供应链及供应链管理呢？供应链就是围绕核心企业，通过对信息流、物流、资金流的控制，采购原材料，制成中间产品以及最终产品，最后由销售网络把产品送到消费者手中的一种将供应商、制造商、分销商、零售商、最终用户连成一个整体的功能网链模式。供应链管理则是一种集成的管理思想和方法，它执行供应链中从供应商到最终用户的物流的计划和控制等职能。从单一的企业角度来看，是指企业通过改善上、下游供应链关系，整合和优化供应链中的信息流、物流、资金流，以获得企业的竞争优势。

盐田港是其所在的港口供应链中的环节之一，装卸、仓储、转运、配送等综合物流体。在集疏运方面，有益排高速、平盐铁路等快速运输方式。在仓储方面，有现代物流中心等高端综合物流服务区。在信息技术方面，有“易港讯”、“直通车”等服务。盐田综合保税区的成立，将推动流通加工、商贸服务、保税多式联运等高端物流业务。提高盐田港及其物流配套等业务的能力，将有助于提升盐田港在港口供应链中的地位，推动加快建设供应链平台。

鉴于对供应链管理重要性的认识，盐田港集团于9月15日—21日在浙江大学举办了物流与供应链管理专题研修班，对物流供应链管理、供应链金融模式、供应链合作伙伴关系构建与信息利用、综合保税区政策解读等知识进行了多维度的讲解。90位学员受益匪浅，并从或宏观或微观的角度对供应链时代盐田港如何提升管理、建设供应链平台提出了自己的观点和见解。

Supply chain management came into vogue since the 90s of 20th century and becomes the key for organizations to be more competitive in global market. So, what is supply chain and supply chain management? Supply chain is a functional network chain that centers around core enterprises, integrates suppliers, manufacturers, distributors, retailers and end users, which begins from purchasing raw materials, producing semi-finished products and end products, to delivering products to consumers by sales network through controlling information flow, logistics flow and capital flow. Supply chain management is a kind of integrated management idea and method, implementing such functions as planning and controlling the logistics from suppliers to end users. Seen from the angle of a single enterprise, it means the action an enterprise takes by improving the relationship between upstream and downstream supply chain, integrating and optimizing the information flow, logistics, as well as capital flow in supply chain to make the enterprise more competitive.

Yantian Port is one of the links in the port supply chain where it locates, being a comprehensive logistics body combining loading and unloading, storage, transshipment and distribution. In terms of transportation in and out of the port, there are such fast transport channels as Yanpai Highway and Pingyan Railway. In terms of warehousing and storage, there are high-end comprehensive logistics service areas like Modern Logistics Center. In terms of information technology, there are such services as "Yesinfo" and "Direct Train". The establishment of Yantian Integrated Bonded Area will promote such high-end logistics business as distribution processing, commerce/trade services and bonded multimodal transport, etc. Increasing the ability of Yantian Port and its supporting logistics facilities is beneficial for harnessing Yantian Port's position in port supply chain and accelerating the establishment of a supply chain platform.

In light of the understanding of the significance of supply chain management, Yantian Port Group held a special training class on logistics and supply chain management in Zhejiang University from 15 to 21 September. The training introduced the knowledge of logistics supply chain management, supply chain financial mode, building of supply chain partnership and information utilization, as well as the policies for integrated bonded areas in multiple dimensions. The 90 trainees benefited a lot from the training and put forward their own points of view about how Yantian Port should upgrade management and build supply chain platform in the age of supply chain, either from a macro or micro angle.

供应链时代

我们的思考与抉择

OUR THINKING AND CHOICES IN THE ERA OF SUPPLY CHAIN

文/何平（盐田港物流有限公司）
By He Ping (Yantian Port Logistics Co., Ltd.)

去年底，深圳商报以深圳本地供应链企业及世界著名物流企业的视点，刊登题为“深圳物流业迈入供应链时代”的报导，越来越多的企业表示出对供应链的热情，越来越多的企业将融入世界级的供应链中并从中获益。

供应链时代，每个企业都面临着同样的问题，也都抱有同样的宏图伟业愿景。多思考，多分析，找一条适合自己的道路比什么都重要。盐田港经历了30年的创业和发展，从港口物流的角度而言，要融入供应链时代，我们该做如何思考和抉择？

我们生逢何时？

当今，随着经济全球化和供应链管理思想飞速发展，现代港口已进入供应链时代，以港口为节点，依托港口发展起来的临港物流业正步入全球供应链管理的重大战略转型期。

然而，港口物流与国际贸易密不可分，港口物流供应链的构造必须与一国的国际贸易现状和发展趋势保持高度一致。随着我国产业政策调整，东南亚国家代工业的兴起，以及发达国家实施工业生产回归政策，出口货源将滞涨甚至回调，以依靠出口货源为生存根本的临港物流业，在低端领域同质化竞争，企业利润空间越来越狭窄，生存环境逐渐恶化。目前，盐田港后方的物流业即面临着如此局面。

但是，进口贸易则迅猛发展，从以下几点可以窥见一斑。

1. 读一读国家最新的贸易促进政策

李克强总理9月29日主持召开国务院常务会议，确定实施加强进口的政策措施，促进扩大对外开放。一是鼓励扩大先进技术设备和关键零部件进口。二是扩大研发设计、节能环保、环境服务等高端生产性服务进口。三是稳定国内需要的资源进口，合理增加与群众生活密切相关的牛羊肉、水产品等一般消费品进口。四是推动进口管理便利化。五是搭建进口贸易平台，利用跨境电子商务等新模式增加进口。鼓励企业在海外建立采购网点和渠道。

Last year, a report entitled "Shenzhen logistics Sector has Stepped into supply-chain Era" was published in Shenzhen Commercial Daily. Based on the views of local supply firms and world-renown logistics firms, this report showed that more and more firms have interest in supply chain, and that more and more firms will benefit from integrating into the global supply chain.

In the era of supply chain, firms are facing the same problems, while sharing the same vision. It's most important to think and analyze, in order to find out a suitable way of growth. From the perspective of the port logistics, how could Yantian Port integrate into world supply chain, after 30 years' development?

1. What's the environment now?

Nowadays, with the rapid growth of globalization and the theory of supply chain management, modern ports have entered the supply chain era. Based on the port, the off-dock logistics sector is undergoing a significant phase for strategic shift.

However, port logistics is closely related to international trade, and the structure of port logistics supply chain must be in accordance with the country's international trade status-quo and trend of development. As the adjustment of industry policy taking place, the rise of industrialization in southeastern countries and the return of manufacturing to developed countries will bring stagflation or even backward in export. Firms in port-logistics industry which live on export are faced with the homogenization of competition in low end. They will see a decreasing profit trend and that's what logistics in Yantian Port will be facing in the future.

However, international trade is powering ahead, which can be seen from the below.

1.1 New policies in boosting trade

On the executive meetings of the State Council on 29 September, Prime Minister Li Keqiang promoted the export stimulus measures, aiming at boosting trade and deepening the opening of the market. Firstly, import of high-tech equipment and key parts should be encouraged. Secondly, we should focus more on the import of high-end services, which involves research and development, energy conservation or environmental protection. Thirdly, except keeping import of key resources stable, imports should be increased concerning beef, mutton and aquatic product, which is closely related to people's lives. Fourthly, administration on import should be made

2. 看一看盐田港近年来的作业箱量与进口重箱量变化趋势。

年份	2009	2010	2011	2012	2013	2014年 (1-9月)
作业总箱量(TEU)	8,579,010	10,133,964	10,264,444	10,666,758	10,796,121	8,569,352
进口重箱(TEU)	512,313	636,334	672,972	782,860	918,378	848,531
进口重箱占作业总箱量比	5.97%	6.28%	6.56%	7.34%	8.51%	9.90%
进口重箱增长率	/	24.21%	5.76%	16.33%	17.31%	/

3. 最后看看我们的伙伴宁波保税区在做什么?

2014年2月, 中航工业集团投资的进口食品供应链项目在宁波保税区投运。香港招商局物流集团投资7.1亿元的物流中心项目也在宁波保税区开工。

2014年3月, 总投资20亿元的中兴宁波全球供应链管理中心奠基, 该项目将被打造成国际物流及供应链业务基地、电子产品加工装配基地、全球进口商品电子商务平台和供应链技术研发中心。

去年, 宁波保税区新增电商企业31家, 其中11家已获批准列入跨境电子商务试点。宁波保税区将以跨境贸易电子商务基地为依托, 打造国家级跨境电子商务试验平台, 力争成为国内最大的快消品进口电商基地。

时代格局正悄然发生变化。一方面, 出口贸易物流供应链中, 货源滞涨, 我们在低端领域激烈竞争, 生存艰难; 而另一方面, 随着进口贸易的迅猛发展, 越来越多的港口物流企业聚焦于进口贸易所产生的物流供应链的建设和构造, 而在供应链的构造过程中, 构造企业无疑是发挥主导作用的。这就是我们港口物流企业所处的时代。

好了, 问题来了, 为什么国内企业热衷于进口贸易供应链构造?

more convenient. Last but not least, the import trading platform should be built, in order to boost import by the new cross-boarder e-commerce. In addition, firms should be encouraged to set up sourcing network and channels overseas.

1.2 Yantian Port container throughput and import laden boxes variables in recent years

1.3 What is Ningbo Bonded Area doing?

In February, 2014, the project of import-food supply chain, funded by China Aviation Industry Group, swung into operations in Ningbo Bonded Area. Meanwhile, the 0.71-billion-yuan logistics center project funded by China Merchants Logistics (Hong Kong) also came into service.

In March, 2014, the 2-billion-yuan Zhongxing-Ningbo Global Supply Chain Management Center was set up, which will serve as the base of the future international logistics and supply chain business, electronic product processing and assembly, e-commerce platform for import commodities and the research center of supply chain technology.

Last year, there were 31 new e-commerce firms in Ningbo Bonded Area, in which 11 were listed as the pilot cross-border e-commerce firms. Supported by this e-commerce base, Ningbo Bonded Area will build the pilot platform in e-commerce, so as become the largest e-commerce base of fast moving consumer goods import.

The industry pattern is under quietly transition. On one hand, in export trade logistics supply chain, with supply stagflation, we compete fiercely in low end and struggle to survive; on the other hand, with import developing rapidly, more and more port logistics enterprises focus on building the supply chain brought by import trade. And the enterprise undoubtedly plays a leading role in building the supply chain. This is the era where port logistics enterprises are.

Then there comes the question, why are domestic enterprises fond of structuring import supply chain?

2. Where are we?

The thought of supply chain is that every enterprise will be integrated into supply chain, no matter single chain or network structure, every enterprise is a part of supply chain, and in the continual "integrating" and "integrated" process, to make the overall interests greatest. However, in a partial supply chain system, there is always a dominant enterprise which plays a leading role.

2.1 Who dominates supply chain benefits distribution?

Let us get to know the participants of port supply chain:

Core enterprises in port supply chain: generally they are large and strong third party logistics enterprises, e.g. large ports and shipping enterprises, international freight forwarding companies. These

我们身在何处?

供应链思想是将每一个企业纳入供应链中, 无论是单链体系还是网络结构, 每个企业是供应链中的一环, 每个企业都处在不停地“整合”和“被整合”过程中, 以求整体利益最大。然而, 一个局部的供应链体系中, 总有一个企业是占据主导地位并起核心作用。

1. 谁来主导供应链利益分配?

了解一下港口供应链参与方:

港口供应链核心企业: 一般为规模较大、实力较强的第三方物流企业(如大型港航公司、国际货代公司)。这些企业掌握众多的箱源, 具有较强的实力和丰富的供应链经营经验, 在港口供应链中处于主导地位。

港海物流企业: 包括港口及腹地的仓储、装卸、转运、配送、流通加工等物流服务商。

其他运输方式经营方。除水运外, 港口的主要运输方式还包括公路、铁路、管道等。对于集装箱运输而言, 公路、铁路是港口主要的集疏运方式。

enterprises have many container sources, competence and rich experience in supply chain management, occupying dominant position in port supply chain.

Port logistics enterprises: including enterprises providing warehousing and storage, handling, transshipment, distribution, circulation, processing and other logistics services in port and hinterland.

Operators of other means of transportation: besides waterborne transportation, other main means of transportation includes road, railway, pipeline, etc. As for container transportation, road and railway are main means of transportation to and from port.

Port authorities: mainly refers to customs, commodity inspection and other institutions which affect clearance efficiency.

Inland nodes: including buyers, shippers, dry ports etc. in hinterland.

It is obvious that core enterprises in port supply chain dominate supply chain benefits distribution.

2.2 Why do they dominate?

Terminals get revenue from shipping companies generated from vessel berthing, and export supervised warehouses and bonded warehouses benefit from international freight forwarding with the introduction of cargoes. In the supply chain system of export-led trade, compared with domestic logistics enterprises, why is it easier for international third party logistics enterprises to capture core positions and have the right to distribute supply chain benefits? In fact, this is determined by market, because main parts of this market are overseas, it is difficult

口岸单位：主要指影响货物通关效率的海关、商检等机构。

内陆节点单位：包括港口腹地的采购商、货主、无水港等。

很明显，港口供应链核心企业才是供应链利益分配的主导者。

2. 为什么由“他们”来主导？

码头由船公司靠泊带来收益，出口监管仓、保税仓大都由国际货代引入货源而获取收益，为什么在出口导向的供应链体系中，国外第三方物流企业要比国内的物流企业更容易占据核心环节，掌握供应链利益的分配权？其实，这是市场所决定的，而这个市场的主要组成部分在境外，国内第三方物流企业很难获得这个市场。

当然，由于互联网信息技术的发展，国外终端客户对供应链的管控能力提升，同时，出于采购成本控制需要，终端客户将其物流供应链细分，部分国际采购企业直接在货物离岸港口寻找物流供应商。此外，一些新贸易方式不断出现，如跨境电商等。在出口贸易物流供应链中，国内企业获取终端市场的机会逐渐增多。

3. 看看我们身在何处。

在以出口贸易为导向的供应链体系中，与上述提及的参与方对照来看，当前，我们仍然处于第二个层面，即港海物流企业。在国际物流的供应链体系中，我们不是核心企业，决定不了供应链利益分配。

要想获取利益分配权，需要掌握终端市场。看到这里，应该就很容易理解为什么国内企业热衷于进口贸易中供应链的建设和构造了。国内进口企业构成了链条中的终端客户市场，使用哪一家船公司、是否要委托货代、购买何种保险等等的抉择权在进口企业。因为文化因素、地缘因素，我们要比国外物流企业更容易掌控这个市场。

for domestic third party logistics enterprises to capture the market.

Of course, with the development of Internet information technology, international end-users have stronger ability to control supply chain. Meanwhile, end-users segment their supply chains to control procurement cost, and some international procurement enterprises find logistics suppliers directly at port-of-departure. Furthermore, some new forms of trade constantly pop up, say, cross-border e-commerce. In export trade logistics supply chain, domestic enterprises gradually have more opportunities to reach end-user markets.

2.3 Where are we now

In supply chain system of export-led trade, considering the participants mentioned above, at present, we are still in the second tier, i.e., port logistics enterprises. In international logistics supply chain, we are not core enterprises and cannot determine the distribution of supply chain interests.

To obtain the right to distribute interests, it is necessary to take control of the end-user market. It is easy to understand why domestic enterprises are fond of building the supply chain for import trade. Domestic import enterprises form the end-user customer market in the chain, and they have the right to decide which shipping company to use, whether to entrust freight forwarding and what kind of insurance to buy, etc. It is easier for us to control the market compared with international logistics enterprises due to culture and geographical factors.

3. Where are we going?

When under favorable circumstances, seek for profits, and when under unfavorable circumstances, plan it out. Having known the development trend of the industry and our position in it, in a changing situation, how can we seize the opportunity and plan it out, so as to ultimately benefit from it?

3.1 Does the stage matter?

A good actor needs good acting skills, but a good stage is of equal importance for an actor. Likewise, a good platform is needed for a business's sound development and optimal allocation of all business elements.

"Ningbo Pattern" in wine trade is an example: the market system is made up of supply chain, specialized market and electronic trading platform with the trading center as the core. And the supply chain includes customs declaration, bonded warehousing, logistics, distribution, etc., building a trading platform for international sellers and domestic buyers. Integrating all kinds of elements, with professional service platform, the Ningbo Bonded Area can conduct imported wine clearance and inspection efficiently with low cost, having obvious advantages of all ports across the nation.

Depending on the market demand in hinterland, with a specialized

我们该往何方？

顺境逐利，逆势布局。清楚了行业发展趋势，明白了自身的“排位”，在变化的局势中，我们该如何抓住机遇完成布局，从而最终获利呢？

1. 好戏台重要吗？

好演员需要有好演技，但好戏台对于演员来讲，同等重要。同样，一个业态要良好健康的发展，所有的商业要素要达到最优配置状态，必须搭建一个良好的营商平台。

红酒交易“宁波模式”就是一个实证：以交易中心为核心的市场体系由供应链、专业市场和电子交易平台组成。供应链包含报关、保税仓储、物流配送等在内的体系，为国外的酒商和国内的采购商搭建一个交易平台。聚合各类要素，配套专业服务平台，宁波保税区进口葡萄酒的通关、通检效率以及低成本在全国各大口岸中优势明显。

依托腹地的市场需求，以一个专业市场为突破口，聚合我们港口、土地资源和公共关系上的优势，辅以盐田综合保税区建设之机，我们完全有能力去建设供应链平台，而这个平台的建设也正是我们的当务之急，平台的建设也将为我们占据供应链上游核心环节奠定坚实基础。

2. 行业第一是如何确立的？

能成为行业第一，必有其“过人之处”。

以供应链的角度来看，我们必须具备聚合和整合一些关键的物流企业的实力，如何具备这个实力？首先是信息技术的创新与运用，其次则是对一方市场相对的掌控，我们需要在信息系统建设，新技术的运用与创新方面，市场的培育与拓展上，加大投入，占领先机。如果我们不能在企业识别上做到与其他物流企业明显的差异，如果我们与其他物流企业相比无明显的竞争优势，我们怎能号令群雄？

盐田港，移山填海三十载，铸就非凡辉煌：泊位总长7885米，堆场373公顷，16个大型集装箱泊位，每周航线100多条，建成各类仓库面积66万平方米。新形势下，我们高举二次创业大旗，求新图变，迎难而上。顺应潮流，抓住机遇，结合实际，找准方向，踏实苦干，盐田港的明天依旧辉煌。

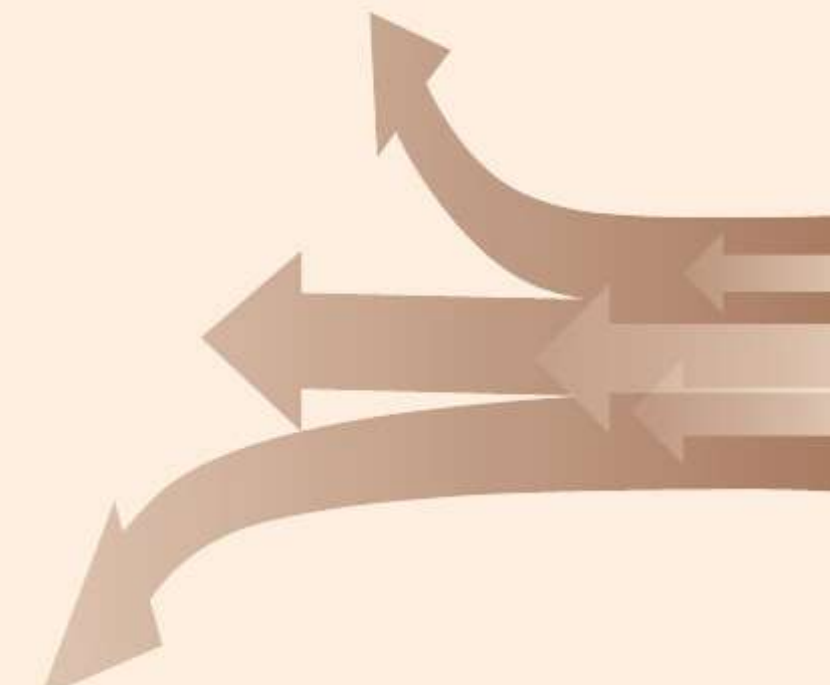
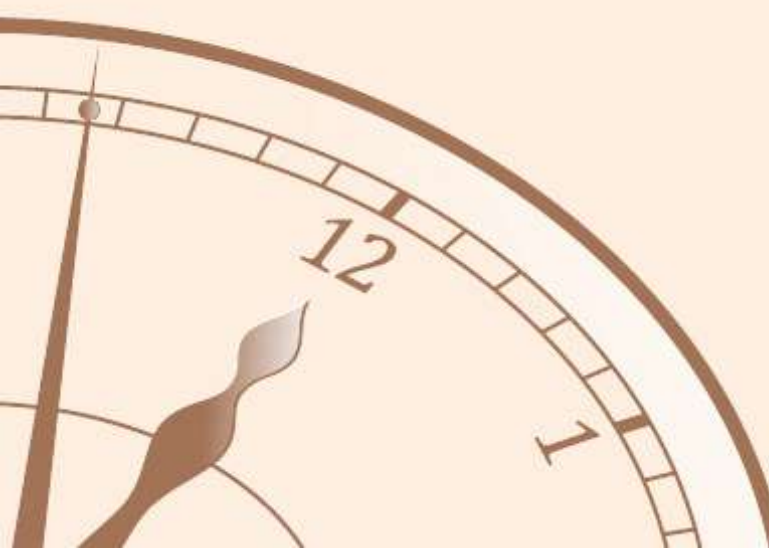
market as a point of breakthrough, integrating port, land resources and public relations and seizing the opportunity of Yantian Integrated Bonded Area, we are fully capable to build supply chain platform. And building the platform is our top priority, which will lay solid foundation for us to capture core positions in the upstream of supply chain.

3.2 How can we be No.1 of the industry?

We must excel to become No.1 of the industry

From the perspective of supply chain, we must have power to integrate key logistics enterprises. How can we have the power? Firstly by innovation and application of information technology, also, we shall have relative control over the market we are located. We must increase investment in information system, new technology application and innovation and market cultivation and exploration to seize opportunities and harness our positions. If we cannot significantly identify ourselves from other logistics enterprises, and if we do not have obvious competitive advantages compared with other logistics enterprises, how can we be the leader?

Yantian Port has achieved miraculous growth with thirty years' development. Now it has 16 container berths with a total quay length of 7,885 meters and a yard area of 373 hectares. It is able to provide over 100 weekly shipping services. Moreover, the warehouses adjacent to the port cover 0.66 million square meters. In the new era, we will power ahead with strengths and resilience, and we will seize the opportunities and meet the changes and challenges with every ounce of creativity, thus to harness our established position in the industry. We are convinced that Yantian Port will have a more promising future.

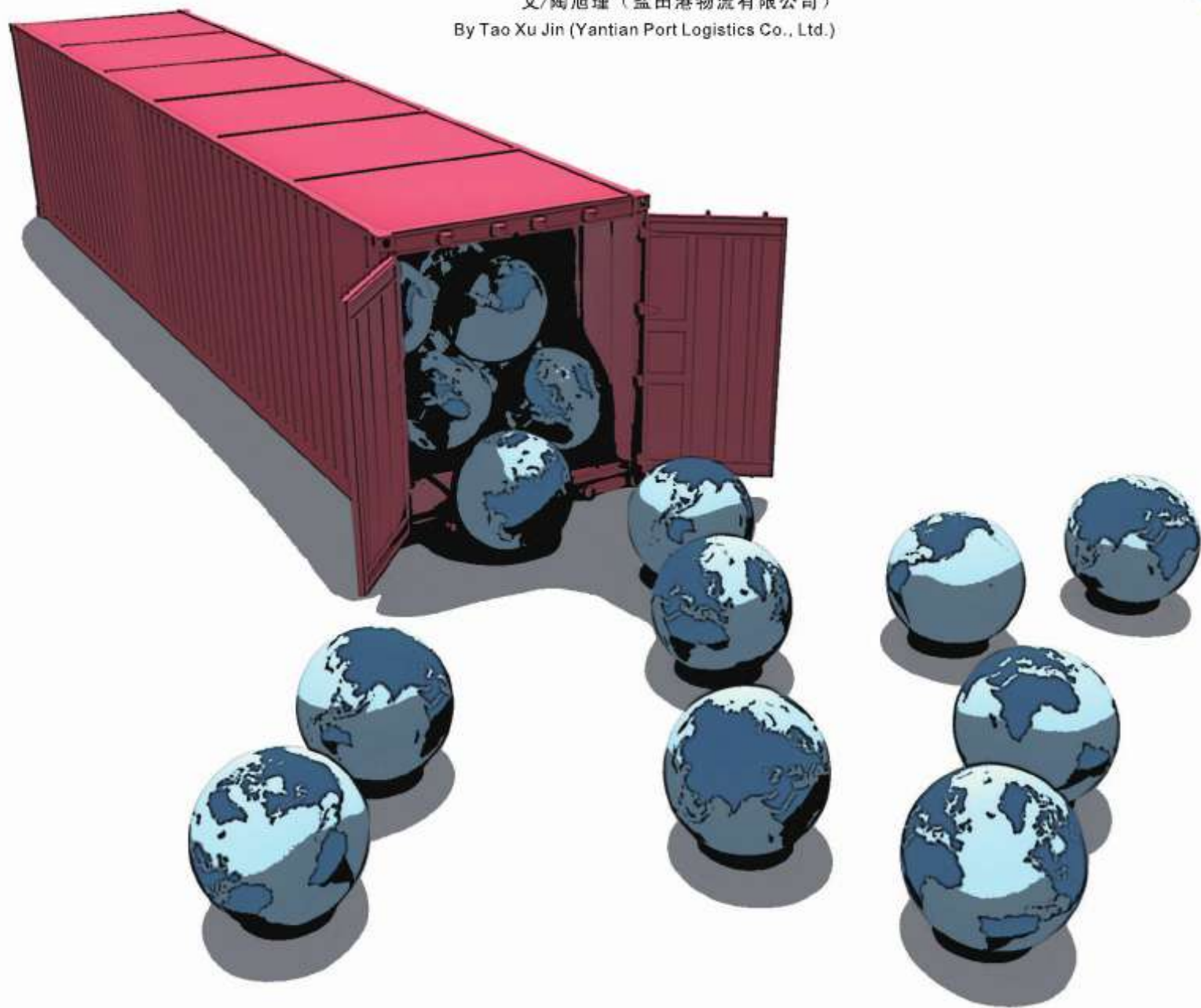


打破定势 物流始现

——浅析盐田港传统仓储企业向现代物流企业发展之路

LOGISTICS TRANSFORMATION BY BREAKING STEREOTYPE
—ON THE WAY OF GROWTH FOR TRADITIONAL WAREHOUSING ENTERPRISES TO MODERN LOGISTICS ENTERPRISE AT YANTIAN PORT

文/陶旭瑾 (盐田港物流有限公司)
By Tao Xu Jin (Yantian Port Logistics Co., Ltd.)



这是一个风云巨变的时代。

诺基亚或将退出手机历史舞台、索尼公司2014财年净亏损额或将达到2300亿日元(约合21亿美元),老品牌的淡出让人感慨。相比之下Iphone 6全球热销、阿里巴巴IPO上市,这些企业的成功崛起使人深思。

新思维打破定势,是企业发展的必经之路。介入新思维的时间越早、对新思维带来的作用反应速度越快,企业才越容易永葆年轻健康的机体,不断领先超越,臻于至善。

近些年来,传统仓储企业总是带给人利润薄、技术含量低的印象,这种定势或已成为仓储企业发展的衰势,这就需要打破对传统仓储企业的定势思维,结合大数据时代特点,在现有资源、技术、人脉的基础上,创造出符合于时代特点的物流概念,展现物流真意。

It is the time of stupendous changes.

Witnessing the possibility that Nokia may withdraw from the stage of mobiles and Sony's expectation on a net loss of 23 billion yen (approximately 21 billion US dollars) in fiscal year 2014, it's inevitable to feel affected. When compare these sad stories with the global success of Iphone 6 or the eye-catching listing issue of Alibaba, we see the need pondering over the success of such enterprises.

"Break the pattern by involving innovative minds." This is a must to the development of each and every enterprise. The earlier this implantation starts, the better it will turn out. Only in this way can the enterprises sustainably maintain healthy systems for growth, and so does the industry.

For years, traditional warehousing enterprises have given people the image of low tech and low profit. It has become the obstacle getting in the way of development. At this time, it takes our innovation, combined with numerous data, to create a new set of logistics concept fitting the time under the foundation of resources, technology and contact.

一、传统国有仓储企业面临的挑战:

1、业务类型较为单一

现代物流系统包括七个功能子系统:运输、保管、包装、装卸搬运、配送、流通加工、信息处理。传统仓储企业的业务,大多在于保管和装卸等活动的简单叠加,有的企业会延伸至相应的运输业务。轻资产概念下,深圳国有仓储企业中,拥有仓库资源的同时、拥有大量自有车辆的并不多,例如深圳市赛格储运有限公司等少数公司有自己的车队,企业的运输业务一般为外包给专业运输公司处理。

信息处理方面,保税区仓储企业都会按照海关要求安装报关数据处理系统,大多数仓储企业也会配有仓库管理系统(WMS: Warehouse management system),作用在于仓库货物的保管、定位、装卸处理等。有的WMS系统可以为客户开放端口,与货代公司的软件平台对接,使得客户无论位于世界何处,都可以随时对自己的货物进行监督检查。

I Challenges Traditional State-owned Warehousing Enterprises Have to Face:

I. Lack of Variety in Business Types

Modern logistics system includes 7 functional subsystems: transport, safekeeping, packaging, handling, dispatching, distribution processing and information processing. For the traditional storage enterprises, mostly the businesses are composed of safekeeping and handling, and some of them will only go further with transport. Under the asset-light strategy, there are not many state-owned warehousing enterprises in Shenzhen which possess the warehouse resources, and at the same time, possess also the vehicles themselves. Only for a small number of companies have their own team of transport, and Shenzhen Electronics Logistics Limited is one of them. As for the rest of the companies without their own team, they tend to rely on outsourcing.

On the information processing aspect, the warehousing enterprises in Bonded Area will install the data processing system of customs declaration as required. And many of these companies have also installed warehouse management system (WMS) in order to manage the safekeeping, positioning, handling, etc. Some WMS could open ports for customers cooperating with forwarding companies' software platform, so that customers could inspect their goods freely whenever they are.

配送方面，深圳市多数仓储企业的配送范围是以深圳、东莞、惠州为中心的珠三角地带，由于运输业务多为外包，资源及客户有限，形成规模优势的企业不多。

流通加工 (Distribution Processing) 是物品在生产地到使用地的过程中，根据需要施加包装、分割、计量、分拣、刷标志、贴标签、组装等简单作业的总称。仓储企业多能承担分拣、刷标志、贴标签、包装等简单的库内增值业务，也能在客户给出 SOP (标准作业程序: Standard Operation Procedure)、购入相应设备、招聘对口人员等条件下完成更为复杂的流通加工任务。2014年1月22日国务院正式批复同意深圳盐田综合保税区的申报方案，盐保也具有了简单加工功能，这就为未来的业务功能拓展奠定了基础。

综上所述，传统仓储企业绝大多数尚未能在七个子功能子系统彼此的内在联系下、在共同目标下形成一个整体系统。该系统下的各功能要素之间存在着相互联系、相互作用的关系，在考虑物流最优化时，就可以从系统的角度出发、树立系统化概念，通过物流功能的最佳组合来实现物流整体的最优化目标。

2、业务网络分布较少

传统仓储企业指的是计划经济体制下的商业、物资和粮食等部门传统的仓储企业，经过转轨变型、改制后设立的物流企业。受历史条件影响，传统仓储企业布局往往较为单一，体现于集中在某一、两个地区。

而现代市场经济的发展，使生产和流通的空间日益扩大。特别是大数据时代以来，电商的风起云涌，人们的购物大环境已逐渐从线下改为线上，只有完善健全的物流网络系统，才能保证商品高效率地分销和材料供应。

2013年5月28日，阿里巴巴集团、银泰集团联合复星集团、富春集团、顺丰集团、三通一达 (申通、圆通、中通、韵达)，以及相关金融机构共同宣布，“中国智能物流骨干网” (简称CSN) 项目正式启动，合作各方共同组建的“菜鸟网络科技有限公司”正式成立。“菜鸟”小名字大志向，其目标是通过5至8年的努力打造一个开放的社会化物流大平台，在全国任意一个地区做到24小时送达。

菜鸟网络专注打造的中国智能物流骨干网将通过自建、

The dispatching range of warehousing enterprises in Shenzhen is confined to the Pearl River Delta, centering Shenzhen, Dongguan and Huizhou. There is only a few enterprises could take the advantage as their transport relies on outsourcing, and that they have limited resources and customers.

Distribution Processing is the general term describing the simple operation of packaging, partition, calculation, sorting, marking, labeling and assembly. Warehousing enterprises mainly can provide services of value-added business like sorting, marking, labeling and assembly. Also, they can further provide customers with Standard Operation Procedure (SOP), buying relevant equipment, and hiring specialists. On 22 January 2014, the State Council has officially approved the plan of Shenzhen Yantian Port Integrated Bonded Area (YIBA), establishing the foundation of future development of processing.

Above all, most of the traditional warehousing enterprises still cannot form an integration system with the seven subsystems, in which the interaction and its systematization concept can achieve the optimization of logistics form.

2. Limited Distribution of Business Network

Traditional warehousing enterprises indicate those affiliated to the organizations such as commerce, resources and food under the planned economy. And they went through transformation and the change of system to become today's traditional warehousing enterprises. Yet, influenced by historic reasons, they are centred in one or two district(s) solely.

The development of market economy has enlarged the room for production and distribution. Internet companies have grown faster since the Big Data has become part of our lives. People's shopping habit has shifted from offline to online. Only for the integrated logistics network system could ensure high efficiency of distribution and supply of materials.

On 28 May 2013, Alibaba Group, Intime Retail Group, Fosun Capital Group, Forchin Group, Express Group, STO Express, YT Express, ZTO Express and Yunda announced with related financial institutions that Chinasmart Logistic Network (CSN) has officially started and that the Cainiao Network Technology Co., Ltd has been established. The self-deprecating name of "Cainiao" aims the opposition which is to create a socialized logistics platform through 5 to 8 years and to deliver any goods in the country within 24 hours.

Cainiao Network focuses on the development of CSN through various models, such as self-development, joint development, cooperation and transformation in order to provide the country a socialized warehouse facilities network.

共建、合作、改造等多种模式，在全中国范围内形成一套开放的社会化仓储设施网络。

3、信息化和电子化程度不高

由于业务类型单一、业务网络分布较少而导致的局限性，传统仓储企业信息化和电子化程度不高。

贸易伙伴需要商业交易中的物流和信息流，以便对商品进行发送、跟踪、分拣、接收、仓储、提货以及包装等。在信息化的电子商务时代，物流与信息流的配合尤为重要，近年来，信息技术以惊人的速度发展，GPS (全球卫星定位)、EDI (电子数据交换)、BAR CODE (条码)、RFID (射频识别) 信息技术在物流业逐渐普遍被应用，使得物流行业管理模式从传统的经验管理、手工管理向以技术为支撑的管理模式转变。库存管理信息系统、配送分销系统、用户信息系统、EDI/Internet 数据交换与传输系统、电子资金交易系统、GPS 系统以及决策支持系统等，对提高物流系统的运行效率起着关键作用。通过这些信息化技术，可以对整个物流过程进行实时跟踪与监控，实现科学化、最佳化管理，减少流动资金占压、缩短资金运转周期、提高利用效率、充分发挥资金的增值作用。

同样以菜鸟举例，菜鸟宣称将利用先进的互联网技术，建立开放、透明、共享的数据应用平台，为电子商务企业、物流公司、仓储企业、第三方物流服务商、供应链服务商等各类企业提供优质服务，支持物流行业向高附加值领域发展和升级。菜鸟通过打造智能物流骨干网，对生产流通的数据进行整合运作，实现信息的高速流转，而生产资料、货物则尽量减少流动，以提升效率。有人认为这种运作模式将颠覆传统物流模式。

4、仓库功能较为单一

传统仓储企业仓库的功能单纯是为储存商品服务，重在货物的保管和保养，只能满足用户物流需求的一部分。不能为用户提供全范围覆盖、全过程服务的要求，更谈不上从用户角度出发主动确定仓储网点、制定存货战略、进行存货管理、节约仓储费用从而实现仓储业自身的经济目的。

加快实现仓库功能多样化是市场经济发展的客观要求，也是仓库增加服务功能、提高服务水平、增强竞争力、实现仓库社会化的重要途径。在市场经济条件下，仓库不应该再

3. Low-level Informatization and Electronization

Given the lack of business type and the limited distribution of network, low level informatization and electronization has resulted among the traditional warehousing enterprises.

Business partners may need related logistics and flow of information so as to make the process of distribution, positioning, sorting, reception, storing, delivery, etc. Nowadays, it is rather important to see the cooperation of logistics and flow of information. Recently the information technology has developed in a rapid speed. GPS, EDI, Bar Code and RFID have been used commonly in the logistics field. This shakes the foundation of the traditional ones which rely on solely management experience. Warehouses manages information system, dispatching and distribution system, users' messages system, EDI/Internet system, electronic payment system, GPS, and decision supporting system as well improve the efficiency of the whole logistics system.

With such technology, real-time inspection and positioning can be achieved, so there will be a better management. That means liquidity can be more flexible. Also, the turnover time cycle can be shortened. In addition, the investment can be in a better use.

Take Cainiao as an example. They claim to be using the top Internet technology to establish an open, transparent and shared data application platform in order to provide top services to various enterprises such as e-business enterprises, logistics enterprises, warehousing enterprises, Third-party Logistics providers, and supply chain services providers. In this way, they aim to support the value-added development and upgrade of logistics industry. By building CSN, Cainiao can deliver high-speed information processing, and high efficiency by decreasing the flow of production information and goods. Some people regard this as a revolutionary logistics mode.

4. Lack of Variety in Storage Functions

The functions of traditional warehousing enterprises are simply providing storage services, safekeeping and maintenance, which can only satisfy a part of users' logistics demand. This certainly cannot provide users a full-scale coverage and integrated services requirements, not to mention the personalized design for users such as confirming warehouse outlets, setting storage strategies, undergoing storage management, and saving storage fee.

It is the objective requirement for the market economy to achieve the diversification of warehouse functions for further development of the system, which means that services functions, services performance, competition ability, and socialization will be improved by this. Warehouses will no longer be simply a place for storage, but also take the responsibility of classifying, picking, sorting, processing,

仅仅是仓储商品的场所，更要成为承担商品分类、挑选、整理、加工、包装、代理销售等职能，还应成为集商流、物流信息流于一身的商品配送中心、流通中心。现在美国、日本等发达国家，基本上都是把原来的仓库改成商品的流通加工配送中心。

综上所述，传统仓储运输企业所提供的简单仓储、运输、包装等服务在物流渠道重组中逐步被系统化、集成化、信息化、网络化与增值化的现代物流服务所取代，具有完善的功能、齐全的网络、高质量服务的新兴现代物流企业大量涌现，对传统的仓储、运输企业提出了严峻挑战。因此，传统仓储企业向现代物流企业转型已经成为不可逆转的发展趋势。

二、传统仓储企业向现代物流企业发展可行性

传统仓储业向现代物流转变最有可能，也最易成功。有如下优势：

packaging, and sales agency. It will become the center of business flow and logistics. Nowadays, developed countries like America and Japan have basically turned warehouses into center of distribution, processing and dispatching.

Above all, traditional warehousing enterprises which originally provided simple storage, transport and packaging will be replaced by modern logistics services which combine informatization, integration, systematization, networking and value adding all together. As more modern logistics enterprises appear, it poses great challenges to the traditional warehousing enterprises. That's why it's an inevitable move for the old ones to transform.

II Possibility to Shift from Traditional Warehousing Enterprises to Modern Logistics Enterprises

The transformation will be the most likely to succeed, and the advantages are the followings:

1. Functional Advantage of the Business

Given that the traditional warehousing enterprises must have

1、业务功能上的继承优势

在上述现代物流系统的七个功能子系统中，传统仓储企业已多少涉及并具有自己的强项优势。这就导致进入的门槛较低，业务功能上无需从头做起。

2、拥有向现代物流转化的物资条件

传统仓储企业积累下来的设施与设备基本上可为发展现代物流所需用，土地库房专用线都是我们较大的资源优势。因此，在设施设备上无需大量投资。

3、拥有适合国情的管理经验

现代物流与传统仓储企业是同一个行业，传统仓储企业向现代物流转化，可以发挥行业特长，在发展现代物流中逐步克服各种困难和障碍，这比到另一个全新的行业更具有优势。

4、拥有向现代物流转化的客户资源优势

经过多年的业务积累，仓储企业已经建立起自己的客户群，通过提升业务功能，提供综合配套和延伸服务，逐步满足客户多元化、个性化的需要。

5、拥有网络资源优势。

在过去长时间的经营过程中，仓储企业有着自己广泛的协作网，积累了广泛的客户群体，这一重要资源，遍布全省及部分省区，人脉网络资源丰富，为实现物流业务网络化提供了坚实的基础。

strengths among those seven subsystems, they do not need to start from the beginning, so that the entry barrier may be lower than the others.

2. Rich Existing Resources for Transformation

The equipment and facilities can basically be used in the new form of business, and the existing land and warehouses resources are our largest advantages. That's why we do not have to invest much on it.

3. Possessing Management Experience which is Suitable for China

Modern logistics and traditional warehousing enterprises belong to the same industry. With the existing experience, surely it will guarantee a quicker adjustment rather than trying to enter a brand new industry.

4. Rich Customer Resources for Transformation

With years of experiences, warehousing enterprises have established their own customer groups. Through upgrading its business, the enterprises are able to satisfy customers' personalized and diversified needs.

5. Advantage of Network Resources

During the long-time management, warehousing enterprises have established their own collaboration network and also groups of customers over the country. Such rich contact provides a strong foundation for networking of logistics business.

III Transformation and Upgrading of Traditional Warehousing Enterprises into Modern Logistics Enterprises at Yantian Port

1. Full Scale Integration of Logistics Resources

Through the logistics platform, Yantian Port Group (the Group) tries to reform and integrate the internal resources and its functions, as well as the flow process of business. Through stock-swap, merger and acquisition, the Group focuses on upgrading the existing logistics resources into high-end ones and aims to become the leader in the industry. As a result, it is expected that the supporting system for logistics will be improved and income from value-added services can be increased. Meanwhile, it will be easier to develop integrated services by using such platform.

三、盐田港传统仓储企业转型升级为物流企业的发展情况

1、物流资源全面整合

集团正在通过物流公司平台，进行企业内部资源、功能的整合重组、业务流程再造。以优化资源结构为重点，对经营业务相近、资源优势互补的传统物流企业，用股权置换、吸收合并等方式进行整合重组，大力推进优势物流资源向龙



头企业集聚。结果定会导致市场物流支撑体系的完善，物流增值服务收入不断提高，同时在整合后的平台下，可以更加容易开发物流综合服务项目。

2、物流平台的系统化及网络化

在集团的领导下，各公司分别提出了适用于未来发展的系统化及网络化目标。以资讯公司为例：资讯公司提出融合发展的目标，将为股东、生态圈单位实施商业智能、ERP、CRM、智能园区、OA、网络工程、视频会议等信息管理系统。更将为盐田港整个生态圈、供应链提供新兴平台和产品，如跨境电子商务、供应链金融、大宗商品交易、以及供应链的各种一站式集成平台等。相信在该类软硬件支持下，向现代化物流企业发展的通路将被打开。

物流公司现正以现代物流中心为据点，创建适用于大数据时代的操作系统。由IT部门牵头，在各个生产单元实地收集、整理方案和数据，其中包括工作单管理、EDI操作管理、拼箱管理、仓库管理、重柜操作、结算管理等功能模块，力图使物流链条更加可视化、扁平化。

以上种种，都为向现代化物流企业的发展提供了优质的平台与空间。

3、发展高端物流及开展精细化综合物流服务

随着国际分工及贸易结构的调整，以及国内内需市场的启动，盐田港区的进出口货物比例出现了进口货物持续增长态势，传统仓储企业向高端化物流发展的时机已经成熟。在此形式下，可以大力发展国际贸易、国际物流，开展国际中转、配送、采购、转口贸易等高端增值服务。同时，国内经济发展由数量扩张型增长向质量效益型增长的转变，为物流业开展高价值精细化的综合物流服务提供了机遇。

4、借助盐田港综保区成立、推进传统仓储的转型升级

随着2014年1月22日国务院批复综保区成立，成为聚集高端物流业发展的重要契机。综合保税区是国内保税经济区域的高级形态，能够支持保税区域与港口的实质联动。盐田综合保税区的申报和设立，将有助于海关监管区域的整合升级，推动保税区贸易发展模式向“进出口均衡发展”转型，有力支持港口作业、国际采购与分拨、商贸服务、保税多式联运等港口物流与贸易高端化业务开展，成为推进港口物流

2. Systematization and Networking of Logistics Platform

Under the guidance of the Group, each company promoted their goals on the development of systematization and networking. Take the Yantian Port International Information Co., Ltd as an example, who suggested the overall development as the goal. There will be an implementation of ERP, CRM, intelligent park, OA, network engineering, video conferencing and other information management systems for the shareholders and the business ecosystem. It will provide Yantian Port's business ecosystem and its supply chain an emerging platform and products, such as cross-border e-commerce, supply chain finance, commodity trading, and various one-stop integrated platform for supply chain and so on. We believe that under the support of both the hardware and software, the door of development of modern logistics enterprises will be opened.

The Modern logistics Center is used for creating an applicable operating system for the Big Data time. Led by the IT department, we collected and organized the existing plans and programs from each production unit, including work order management, EDI operations management, consolidation management, warehouse management, operations of laden containers, billing management modules, in order to make the logistics chain more flattening.

Above all, they provide a sophisticated platform and space for the development of modern logistics enterprises.

3. Development of High-end Logistics and Precise Integrated Logistics Services

With the adjustment of the international division of labor and trade structure and the growth of the domestic market in China, the proportion of both import and export of goods in Yantian port area have seen a continued growth. The timing of transforming the traditional logistics enterprises to modern ones has come. In this way, it is possible to develop international trade, international logistics, international transit, distribution, procurement, entrepot trade and other high value-added services. Meanwhile, the domestic economy has shifted from quantity growth to quality growth, and it provides opportunities for high-value integrated logistics services.

4. Driving the Transformation and Upgrade of Traditional Warehousing Functions by the Establishment of YIBA

The establishment of the YIBA, which was approved by the State Council on 22 January 2014, provides an important opportunity for the development of the high-end logistics industry. YIBA is an advanced form of bonded economic region in China, to support the interaction between the bonded area and the port. Its establishment will boost the upgrade and integration of the Customs Supervisory Zone and promote the growth model of "balanced development of

业大提升、大发展的重要机遇。

以盐田港现代物流中心全球物流商贸城项目建设为龙头，汇聚一批具有较强市场影响力的国际贸易企业、具有世界性经营网络和强大供应链管理能力的第三方物流企业、跨国公司的采购和分拨配送机构，大力发展进口酒类、冷冻冷藏农产品、医疗设备、精密机床等商品的保税展示和进口贸易业务，构建辐射深圳和华南地区的进口商品综合物流商贸平台。

5、集思广益 他山之石可攻玉

2013年年底至今，集团先后召开了务虚会、务实会，以发动全体员工、集思广益的形式调动大家的积极性，并形成了切实可行的多种方案，适用于物流企业、港口变革、网络革新等各个方面，现在获批议案已在如火如荼地进行。

并先后举办电子商务、工程管理、物流与供应链管理等各种专业对口的研修班，派遣集团公司及下属各企业中层及骨干人员进行专项调研和学习。扩大视野、加强自身建设。

在世界经济变局背景下，物流公司面临着从传统仓储企业到新型物流企业的转换，急待加强与物流相关的、新产业方面的力量。希望在集团的领导下，把物流引入一个新的概念下面，把物流产业做大做强，开拓一个新的局面。

import and export". This is a strong support to port operations, international procurement and distribution, business services and bonded multi-modal transport and other kinds of high-end port logistics and trade, which will play a key role in boosting the development of port logistics sector.

The projects leading by Global Logistics and Trade Centre of Yantian Port Modern Logistics Centre aim to attract influential international companies, such as third-party logistics companies with strong supply chain management ability and global network, as well as procurement and distribution institutions of multinational firms. Based on these, the bonded commodity display and import trade business of wine, refrigerated agricultural products, medical equipment and precision machine tools so as to build an integrated logistics and trading platform for imports in Shenzhen and South China.

5. Collecting Internal and External Wisdom

Since the end of 2013, the Group has held meetings and brainstorming sessions to listen to the voice of the staff and collect ideas from them. It led to the formation of a variety of practical solutions and plans for logistics companies, reform and innovation in port and network. The plans which have been approved are now in full swing.

The Group also hosted trainings of e-commerce, project management, logistics and supply chain management for related personnel, so that they can expand their horizons and gain know-how which is beneficial for professional development.

Under the background of world economic change, the logistics companies face transition from traditional warehousing companies to the modern logistics enterprises. We shall power ahead with strength and resilience in the field of new logistics. We hope that under the leadership of the Group, new concept of logistics can be introduced in order to harness our strength and to break new ground for the industry.



论物流企业的转型升级

ON TRANSFORMATION AND UPGRADING OF LOGISTICS ENTERPRISES

文/谢章生 (盐田港物流有限公司)

By Xie Zhangsheng (Yantian Port Logistics Co., Ltd.)



自盐田港开港以来,港口集装箱的吞吐量持续高速增长,现已成为国际四大深水之一。截止至2013年年底,盐田港区集装箱吞吐量达1080万标箱,占深圳港年度市场份额的47.59%,已成为全球单体最大集装箱港区。在当前经济全球化趋势深入发展的状况下,网络信息技术革命带动新技术、新业态不断涌现,物流业的发展面临机遇与挑战并存,新技术和供应链精细化管理的不断发展并在物流业得到广泛运用,为生产流通企业提供了越来越低成本、高效率、多样化、精益化的物流服务,推动制造业专注核心业务和商贸业优化现有的内部分工。以新技术、新管理模式为核心的现代物流体系日益形成。未来,随着国际产业转移步伐不断加快和服务贸易快速发展,全球采购、全球生产和全球销售的物流发展模式正在日益形成,迫切需要成长一批深入参与国际分工、具有国际竞争力的跨国物流企业,畅通与主要贸易伙伴、周边国家便捷高效的国际物流通道,形成具有全球影响力的国际物流中心,以应对日益激烈的全球物流企业竞争。

未来,盐田港港区物流企业将以建设现代物流产业体系为目标,以供应链管理、新技术应用和信息化建设为依托,促进传统物流企业的功能整合和服务延伸,加快向现代物流企业和供应链管理企业转型升级,大力发展物流金融、订单管理等高附加值物流服务,推动物流业向产业价值链高端环节延伸。

The throughput volume of Yantian Port has maintained a high growth rate since its inception, making it one of the four largest deep-water ports globally. By end of 2013, its container throughput amounted to 10.8 million TEU, accounting for 47.59 per cent of the Shenzhen's market share in 2013. Therefore, it has risen to be the largest single container terminal of the world. As the economic globalization continues to develop, new technologies and business models are brought out by the internet information technology revolution, logistics industry faces both opportunities and challenges. New technologies and the precision management methods of the supply chain are widely used, providing manufacturers and distributors diversified and specialized services of low-cost and high-efficiency, guiding the manufacturing industry to focus on its core services and promoting the optimization of the division of labor within the commerce industry. The modern logistics system characterized with new technologies and management models are taking shape. In the future, the gradual development of the trend of global procurement, production and distribution along with the accelerated shift of the international industries and rapid development of the service trade calls for a group of competitive multinational logistics companies which participate in international division of labor in greater depth, with the aim to provide convenient and high-efficient logistics channels with major trading partners and adjacent countries, form an international logistics center with global influence and to come out better in the ever more intense international competition.

Based on the target of constructing a modern logistics industrial system and supported by supply chain management, the application of new technologies as well as the construction of informatization, logistics companies at Yantian Port will promote the integration of

盐田港港区物流现状

在原有的港区规划建设中,盐田港区的规划思路是依托盐田港,加快发展国际集装箱运输、中转,仓储、拆拼箱加工等业务功能,其核心思路是发展国际物流产业。而现有港区的物流企业群体中,大部分企业提供的服务内容比较单一,竞争能力较底,主要是以资源租赁的经营模式为主,甚至都不能称为真正意义上的第三方物流企业。现有的港区物流企业群体业务同质化竞争激烈,物流资源配置利用率低效,整体港区企业间也未能统筹协调,形成合力,导致现有港区范围内未能出现具有典型的物流龙头企业,在港区范围也未形成具有竞争力的物流产业群。对港口而言,主要的功能仍是货物的集散分拨,这正是物流企业的核心竞争功能,物流企业应结合现有港口的发展趋势,明确企业自身的发展方向及发展目标。

港区物流企业的转型升级

针对现有的港区物流企业的现状,港口物流企业的转型升级需要在以下几个方面需要重点突破。

一、以消费者为导向,加强供应链服务信息系统平台的建设:现有各企业的物流信息管理系统更专注于对客户订单的处理,对于所服务企业的上下游之间的商贸信息、供应链信息等并不关注。互联网是一个开放的巨大平台,参与各方可实现数据、信息、资源的共享,通过订单、生产、交易、物流的闭环,可建立企业间相互支持的供应链信息服务平台,实现供应链管理的所有环节,完成客户一站式服务的完整体验。未来的供应链信息服务系统将向企业提供跨行业和跨区域的智能服务,并在平台上加强综合运输管理系统、物流订单处理系统、第三方支付系统、电子口岸系统以及各类商品交易平台等系统平台之间的互联、互通和信息共享,进一步的促进供应链企业间的信息交互质量,提高整条供应链的市场竞争力。

二、物流新技术开发与应用:物流是社会经济发展的产

functions and the range of services with regard to traditional logistic companies and accelerate the transformation and upgrading processes toward modern logistics companies and supply chain management enterprises. They will also strengthen the efforts to develop such services with high added value as logistics finance and order management so as to promote the extension of the high-end section of the industry value chain.

The Current Situation of Logistics at Yantian Port

According to the original layout plan, Yantian Port centers itself on developing international logistics industry by accelerating the development of such functions as container transportation, transshipment, warehousing and storage, FCL and LCL. Most of the logistics companies adjacent to the port are lack of competitiveness as they operate in the form of resources renting and provide only one pattern of service. They are not the third-party logistics companies in its true sense. The homogeneity competition prevails among logistics companies in the area, causing low utilization rate of resource allocation. The lack of cooperation among all the companies leads to the lack of a leading company and industrial cluster with strong competitiveness. The main function of a port is the collection and distribution of cargos, which is also the core competitiveness of logistics companies. Therefore, they need to define the directions and aims for development by taking into account the development trend of the port.

Transformation and Upgrading of Logistics Companies

According to the present situation of the companies in the port area, they should make breakthroughs in the following aspects to achieve transformation and upgrading.

1. We shall promote the building of the consumer-oriented information platform for supply chain services. The present logistics information managing system focuses more on the dealing of consumers' orders, paying little attention to the commercial and supply chain information among matching service industries. On the internet, an open and huge platform, participants can share their data, information and resources and build up a supply chain information service platform among companies through the close-loop of such parts as orders, manufacturing, transaction and logistics, thus integrating all parts of the supply chain together to give a one-stop

物，而随着社会经济的发展，现代物流管理需要具有更先进的物流新技术的开发和应用。例如：二维条码技术、无线射频识别技术（RFID）、电子数据交换技术（EDI）、全球定位系统（GPS）、地理信息系统（GIS）、智能交通系统（ITS）等。现有的物流企业在日常的操作中，仍采用传统的操作方式，对货物全程操作中的时效性及安全监管方面均有较大的提升空间。如企业需要在市场上有更加突出的表现，新技术的开发和应用是可为企业提供一条短时间内提高企业服务质量和水平的新途径。未来的物流企业需要完善物品编码管理体系，推动条码和智能标签等标识技术、自动识别技术以及电子数据交换技术，推动物联网、云计算、大数据、移动互联网等技术，实现对货物可追溯、在线调度管理、全自动物流配送、智能配货等领域的应用。

三、以物流服务品牌为主导，整合资源，加强物流企业在供应链金融、跨境电商贸易等方面创新。未来公司的战略将越来越多的关注于品牌的经营，公司可通过采用服务外包、服务管理等模式，使公司更有效的利用从采购到销售的各环节的实物资源，减少对内部资源的依赖性，从而更好的满足客户的需求。在大数据时代下，平台与资源的结合最终要供应链服务信息系统的无缝链接来实现。这是关注用户体验的基础，也是服务标准化落地的前提。只有通过强化供应链服务信息系统的建设、强化系统的智能化和信息化的改造，物流才不再是提供简单的仓储、运输、装卸等业务，而是与客户深度的一体化。未来的物流企业需要深入客户前端的商业模式设计，为客户提供供应链全流程管理解决方案，包括客户的物流、资金流的整体方案，实现客户现金流的高效利用更是互联网供应链企业的核心追求之一。在未来物流的创新领域中，谁能掌握金融服务，谁就会成为市场的最终胜利者。

跨境电商交易是市场上出现的一种消费新趋势，随着国人的收入大幅增加，对消费的需求也必然提高和多样化起来。众所周知，商品进口时需要缴纳进口关税、增值税和消费税，进口商品最终流入市场时还要计算物流仓储成本、分销商利润，到达消费者手中时价格已经高出出口价一倍甚至多倍。在海淘+代购时代，谁掌握了优质货源，拿到最优惠的价格就可以在市场站稳脚跟。跨境电商越来越成熟以后，终端消费者面对的市场是一张互联网——全世界电商。货源和渠道这一对“海淘+代购”模式的瓶颈将被打破，未来跨境电商竞争的焦点将转移到物流供应链的解决方案上，具体表现在仓储管理、跨境配送、供应链金融管理等附加价值三个方面。物流行业发展到今天，已经与电商形成了不可分割的关

service experience to customers. The new supply chain information services system will provide cross-industrial and cross-regional intelligent services to the companies, strengthen the connection and information-sharing among transportation management system, logistics order handling system, the third-party payment platform, E-port system as well as various commodities trading platforms, in order to promote the information sharing among supply chain companies and enhance the competitiveness of the industry as a whole.

2. We shall develop and apply new technologies. Since logistics is the outcome of social and economic development, modern logistics management needs to develop and utilize more advanced technologies along with the social and economic development. The new technologies may include the bar-code technology, RFID, EDI, GPS, DIS and ITS. However, at present, logistics companies still adopt traditional handling method, leaving great room for improvement with regard to the efficiency in the whole handling process of the cargos and the safety supervision. For instance, companies can rely on the development and application of new technologies to improve their service quality and management level in a short time so as to excel other companies in the market. Logistics companies need to improve its coding management system by applying such labeling or intelligent labeling technologies as bar-coding and intelligent labeling, promote the development of such technologies as the Internet of Things, cloud computing, big data and mobile internet and their application in areas of the trace of goods, online transit management, automatic distribution and intelligent distribution.

3. We shall integrate resources to promote innovations in such areas as supply chain finance and cross-border e-commercial trade with the logistics service brands as the leading factor. Companies' strategies will center more on the forge of brands. To serve this end, companies can adopt service outsourcing and service management to make use of resources during the processes from purchasing to marketing more efficiently, so that companies can rely less on its own resources and meet customers' increasing needs. Under the background of the big data, it requires the application of the supply chain service information system to integrate platforms with resources. It serves as the first step of the concern for user experience and also the presupposition for the realization of standardized services. Logistics can reach in-depth unitization with customers other than providing such simple services as storage, transportation and loading and unloading by the construction of supply chain service information system and the reform of the intelligence and informationization levels of the system. Logistics companies need to enhance the design of business modes that bear deeper connection with customers to provide customers with one-package solutions for supply chain, including the handling of the flow of cargos and capital. What's more, internet supply chain companies should make it a key goal to achieve productive utilization of customers' cash flow. Among all the innovative areas in the future, the company which comes out on top

系。电商的发达促进物流行业壮大，如电商的物流能力不足将严重限制电商发展，反之亦然。时至今日，物流行业已经从电商的背后走到了与之并肩的位置。优质、高效、用户体验高的物流伙伴会极大提高品牌竞争力，反之则会将辛苦打造的品牌毁于一旦。高品牌的物流合作伙伴如今已经成为品牌商打开市场的重要砝码。未来的物流企业在跨境电商方面展现的商业模式应为：建设一支专业的货源地采购团队，加之提供配套的供应链管理，将跨境电商物流的触角向前伸，为电商伙伴提供一站式物流服务，同时为客户提供更深层次的产品设计、物流解决方案设计及实施、供应链信息支持、供应链金融等方面的服务。

面对未来更加激烈的市场竞争和迅速变化的市场需求，为客户提供日益完善的增值服务，满足客户日益复杂的个性化需求将成为现代物流企业生存和发展的关键，物流企业的发展只有通过持续不断的功能服务升级方可在市场中茁壮成长。在经济全球化的推动下，资源配置已从一个工厂、一个地区、一个国家扩展到整个世界。未来的物流企业将通过现代运输方式、新技术的应用、精细的物流管理方式、通畅而完整的供应链信息管理服务，持续的降低物流成本，提高了物流效率，在国际贸易和全球资源配置中发挥着越来越大的作用。作为新崛起的产业，经济全球化将为物流企业的发展带来前所未有的机遇，物流企业正越来越引起人们对它的关注和重视。

in the finance area will become the winner of the market.

As Chinese people's income has increased by a large margin, their consumption needs are also improved and diversified, which give birth to cross-border e-commerce transaction, a new consumption trend. It is known to all that the imports of commodities need to pay tariff, added value and consumption duties and the retail price will be twice or even more than twice of the export price for it still need to add the warehousing and storage cost and benefits allocated to different distributors. In the era of buying goods directly from overseas websites and purchasing on a commission basis, the one who has an ample and good supply of goods and favorable prices can stand firm in the market. Along with the development of the cross-border e-commerce, the end users will be faced with a market in the form of an internet that is worldwide e-commerce. The source of goods and marketing channels, the bottleneck for buying goods directly from overseas websites and purchasing on a commission basis will no longer exist, and the core competitive edge to the e-commerce business will be on the solution of logistics supply chain, manifested in such added-value aspects as storage management, transnational distribution and supply chain finance management. Logistics industry now has a close relationship with e-commerce. The prosperity of the e-commerce industry promotes the development of logistics. The lack of matching logistics services can restrict the development of e-commerce, and vice versa. In fact, logistics industry has been standing along with the e-commerce rather than staying behind the latter. Logistics companies that provide qualified, highly-efficient services and high-quality experience to users will enhance the brand's competitiveness; otherwise it may ruin a brand. To build cooperation with an excellent logistics company is crucial for brands to open up new markets. The future model for logistics companies in the transnational e-commerce business will be to build up a professional procurement team in local countries to provide one-stop logistics services to e-commercial business partners with the support of supply chain management, and to provide customers with better services in such aspects of the product design, the design and implementation of logistics plan, information support for supply chain and supply chain finance.

For modern logistics companies faced with intense market competition and changeable market demands, providing customers with optimized value-added services and meeting customers' sophisticated and personalized needs are crucial for their development. They can only achieve growth and prosperity by upgrading their services continuously. Economic globalization promotes the resource allocation to expand from the latitude of a factory, an area and a country to the latitude of the whole world. Logistics companies will play a more and more important role in international trade and global resource allocation by the application of modern transportation methods and new technologies and the adoption of fine logistics management and integrated supply chain information management services which lower the logistics costs and improve efficiency. As an emerging industry, logistics will enjoy unprecedented opportunities brought by economic globalization and will attract more attention from the world.



SUPPLY CHAIN FINANCE
SERVICE AND ITS RISK CONTROL供应链金融业务
及其风险控制

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要了解供应链金融业务的风险，首先要把握供应链金融业务的实质。

一、什么是供应链金融？

一般是指银行向客户（核心企业）提供融资和其他结算、理财服务，同时向这些客户的供应商提供贷款，或向其分销商提供预付款代付及存货融资服务。简单地说，就是银行将核心企业和上下游企业联系在一起提供灵活运用的金融产品和服务的一种融资模式。

无论从银行或被服务企业角度看，供应链金融都是一种业务创新。其创新主要体现在其“整体营销概念”——银行以核心企业为依托，针对核心企业及其上下游配套企业整个产业链提供整体融资方案。原本许多企业在银行传统的业务（主要是抵押贷款、保证贷款和信用贷款）下无法获得的银行融资（主要是缺少抵押的资产、缺少担保的企业和实力规模较少不具备信用贷款条件），通过这样的业务创新，通过与核心企业的绑定和在供应链中的位置，可以获取银行的融资。供应链企业和银行均因此受益。

目前企业也可以部分代替银行开展供应链类金融业务。

二、供应链融资五种模式

供应链融资种类较多，最常见的有五种模式。

（一）对核心企业上游供应商提供融资

To understand the risk of supply chain finance service, it is necessary to grasp the essence of supply chain finance service.

1. What is supply chain finance?

Generally it refers to the bank provides its customers, namely, core enterprises with financing and other settlement and financial services, offering loans to these customers' suppliers, or paying advance payments and providing inventory financing service for their distributors. Briefly speaking, it is a financing pattern that the bank connects core enterprises with their upstream and downstream enterprises and offering flexible financial products and services.

No matter from the perspective of the bank or enterprises being serviced, supply chain finance is a kind of service innovation which is mainly reflected by its "overall marketing concept", which is, depending on the core enterprise, the bank provides overall financing solutions for the whole supply chain including the core enterprise and its upstream and downstream enterprises. Originally, under traditional banking, mainly mortgage loaning, guaranteed loaning, and credit loaning, and many enterprises cannot obtain financing from the bank due to the lacking of mortgage assets, lacking of guarantor and being not large and strong enough to get credit loans. This service innovation binds supply chain enterprises with the core enterprise, with their positions in the supply chain, they can obtain financing from the bank, from which both supply chain enterprises and the bank benefit.

At present, enterprises can partially substitute banks to do supply chain finance business.

2. Five patterns of supply chain financing

There are many kinds of supply chain finance, from which five patterns are most common.

1、应收账款融资

一般是企业将银行认可的应收账款抵押或者让售给银行，银行支付对价给中小供应商融资。银行之所以认可该中小供应商的应收账款，是因为该笔应收账款的最终付款人是核心企业，回报有保障，且银行对交易双方背景及交易情况均比较了解。例如：

（1）某通讯器材商A与华为公司（核心企业）签订协议，发货1000万元；（2）华为公司收到货物并验收后，将应收账款单据交给银行，确认将来会支付货款；（3）A向银行申请将该笔应收账款1000万元保理；（4）银行根据申请，按照一定贷款利率，扣除手续费，向A提供资金；（5）在账期内，华为公司直接将应收账款支付给银行。

2、存货融资

一般是企业利用核心企业上下游企业真实贸易中的动产（原材料、在制品、产成品）为质押从银行融资；在操作过程中，第三方物流企业作为监管方进来，银行、借款企业和物流企业签订三方合同。例如：

（1）A中小企业、B银行、C监管公司签订三方合同。A将产成品1000万元交B指定仓库由C监管；（2）B确认质押物后，按设定质押率（如70%）给企业一定授信额度；（3）C审核最低限额，限额以上质押物可以自由进出；（4）所需质押物低于上述最低限额时，A向B缴纳保证金；（5）B给A发提货单，并指示C给客户发出相应数量质押物；（6）C监管人员验收A上述提货单并根据B指示发货。

3、订单融资

主要是供应商基于与向核心企业供货的真实业务，将向核心企业供货的货物和应收核心企业的应收账款抵押给银行，向银行融资；是上述应收账款融资和存货融资的结合。这里不再赘述。

（二）核心企业下游经销商融资模式

1、厂商银模式（三方预付款模式）

经销商、核心企业与银行三方签订合同，银行向经销商提供定向封闭融资，核心企业根据银行指示发货给经销商，经销商提货；一般情况下，以核心企业回购承诺作为担保措施。例如：

（1）A经销商与B汽车厂签订购销合同2000万元，并向C银行申请三方预付款融资。（2）C审查B资信情况，与其签

2.1 Provide financing service for core enterprise's upstream enterprises

2.1.1 Accounts receivable financing

Generally, enterprises mortgage or factor recognized accounts receivable to the bank and the bank finance small and medium suppliers by paying consideration. The bank recognizes small and medium suppliers' accounts receivable because the ultimate payer of this account receivable is core enterprises, the return is guaranteed and the bank understands the background and transaction of both parties. For example:

a. Communications equipment manufacturer A signs agreement with Huawei, the core enterprise, and sends goods worth 10 million to it; b. after receiving and accepting the goods, Huawei gives accounts receivable documents to the bank and confirms that it will pay the bill in the future; c. A applies to the bank for factoring this 10-million accounts receivable; d. based on the application, the bank offers funds to A after deducting commission charge according to a certain lending rate; e. Huawei pays the accounts receivable to the bank directly in its account period.

2.1.2 Inventory financing

Generally, enterprises finance from the bank with movables, such as materials, work-in-process and finished goods, in real trade between core enterprise and its upstream and downstream enterprises as the pledge. During the operation, third-party logistics (3PL) enterprise enters as a regulator and the bank, the borrower and the logistics enterprise sign a tripartite indenture. For example:

a. Small enterprise A, Bank B and 3PL enterprise C signed a tripartite indenture. A sends finished goods worth 10 million to the warehouse designated by B under C's regulation; b. after confirming the pledge, B gives a certain line of credit according to the set pledge rate, say, 70%; c. C audits the minimum amount, above which the pledge can enter and exit freely; d. A pays deposit to B when pledge needed is below the above minimum amount; e. B sends bill of lading to A and instructs C to send corresponding amount of pledge to customers; f. regulators of C accept the above bill of lading and deliver goods according to B's instruction.

2.1.3 Order financing

Based on real business with the core enterprise, suppliers finance from the bank by mortgaging goods supplying for the core enterprise and core enterprise's accounts receivable. It is a combination of accounts receivable financing and inventory financing mentioned above. I won't elaborate more here.

2.2 Financing pattern of core enterprise's downstream distributors

2.2.1 factory-distributor-bank pattern (advance payment by three parties)

Distributors, core enterprise and the bank signed tripartite indenture, under which the bank provides directional closed financing for distributors, core enterprise delivers goods to distributors according to the bank's instruction, and distributors take delivery of the goods.

订回购及质量保证协议。(3)根据A、B的资信情况，C确定A缴纳保证金比例(如30%)。A据此缴纳保证金600万元。

(4)C签发以B为收款人的银行承兑汇票或者向B支付货款2000万元。(5)B向A发货，并将物品权属文件(如汽车合格证等)交与C作为监管。(6)A实现销售，需要提货时，向C补足货款，C将其物品权属文件交与A。

2、厂商仓银模式(四方预付款模式)

与上述三方预付款模式相比，多了物流企业货物监控。这里不再赘述。

三、如何控制供应链金融的风险

供应链金融不同于不动产抵押贷款、单个企业贷款，存在涉及企业较多、贷款业务运作过程较长、较复杂、动产不便于抵押等诸多问题，风险控制因而尤为重要。这里简单就风险控制谈谈个人认识。

1、从总体上把握——看行业

供应链金融业务大部分是基于对核心企业资金、实力的信任，对货物变现能力和保值的认可。所以，首要是看行业，行业不景气，核心企业自身难保，其作出的承诺也将难以兑现；担保货物价格大幅下跌或难以处理，使银行面临企业保证金不足、担保物无法用于还贷的风险，从而造成损失。比如，前几年钢材价格大幅度下跌，加上钢贸融资出现问题较多，目前深圳银行一般已不再接钢材经销的融资业务。

2、看供应链企业之间的业务关系

有些供应链(如汽车生产商)中，核心企业与其上游供应商和下游经销商关系比较密切，生产商对上下游企业的管理也比较到位，这样的供应链就比较适合开展供应链融资。

如果核心企业与上下游企业之间的交易关系是纯粹市场交易关系，或者核心企业极为强势，产品超级畅销或垄断，不愿意帮助企业融资等，就不适合开展供应链融资。

3、选择信誉好、实力强、管理规范的监管公司

由于货物是流动的，选择好的监管公司(仓库和物流公司)，主要是避免货物被转移、仓单重复抵押等风险。

4、控制运输风险

Generally, core enterprise's repurchase commitment is regarded as guarantee measure. For instance:

A. Distributor A and automobile factory B signs purchase and sale contract of 20 million yuan, and applies for tripartite advance payment financing to Bank C; b. C audits B's credit and signs repurchase and quality guarantee agreement with B; c. C confirms the ratio by which A pays deposit, say, 30%, according to which A pays 6 million yuan as deposit; d. C signs acceptance draft with B as the payee or pays B 20 million yuan; e. B deliver goods to A and gives ownership documents, e.g. automobile certificate to C for regulation; f. when A accomplishes selling and needs to pick up the goods, A supplements money to C and C gives ownership documents to A.

2.2.2 Factory-distributor-warehouse-bank pattern (advance payment by four parties)

Compared with the above pattern of advance payment by three parties, cargo monitoring by logistics enterprises is added. I won't cover it here.

3. How to control the risk of supply chain finance

Supply chain finance is different from real estate mortgage loans and single enterprise loans in that it involves more enterprises, and that the loaning operation takes longer time, and that movables are hard to mortgage, etc. Therefore, risk control is vital. Here I will give my understanding of risk control briefly.

3.1 Judge from the industry prospect

Supply chain finance is mostly based on the trust in core enterprise's funds and power, and the recognition of goods' liquidity and value. Therefore, industry should be considered firstly. If an industry is in recession, then its core enterprises are unable to help themselves, making their commitments hard to fulfill; when the price of pledged goods drops sharply or hard to handle, banks will encounter risks of lacking enterprise deposits and pledges cannot be used to repay loans, which will bring about loss. For example, in previous years, steel price decreases sharply, and many problems arise in steel trade financing, as a result, at present banks in Shenzhen rarely provide financing service for steel business.

3.2 Consider the business relationship between companies in a supply chain

In some supply chains, e.g., automobile manufacturing, the core enterprise has a close relationship with its upstream supplier and downstream distributor, and the manufacturer manages upstream and downstream enterprises rather well, then this kind of supply chain is suitable for supply chain financing.

If the relationship between core enterprise and its upstream and downstream enterprises is purely market transacting, or the core enterprise is extremely strong, with its products best selling or monopolistic, and unwilling to help enterprises to finance, then it is not suitable to do supply chain financing.

3.3 Choose 3PL companies with good credit, competence and

关注运输是否连接由核心企业自身完成，或者第三方承运人是否有足够的资质；在途风险和损失责任是否明确；提货单收货人或运单指定交收人等均为银行。选择有实力、有信誉的运输公司还可以防范货物被盗损失，减少运输公司与借款企业置换货物等风险。

5、选择合适质押物

质押物应具备以下特点：

(1) 货权清晰

便于银行最终对货物处置时没有其他第三方主张权利，因此在进行动产质押时需出质人提供动产权属证明，如增值税发票、货运发票等。

(2) 价格稳定

价格波动剧烈的商品不宜作为质押物，一是增加了盯市工作量，二是处置需要时间，三是价格下跌易跌破担保额值。

(3) 流动性强

易于银行处置、变卖，一般为基础原料、战略物资、大宗物资等。

(4) 易于保存

6、人员风险

包括两方面：

(1) 工作人员责任心不强导致工作疏忽或失误，比如制作文件不严谨、审单验货等出现差错等；

(2) 工作人员与外单位人员内外勾结，发生伪造单据、重复质押、监守自盗等违法行为。

要完全防范人员风险很难。一般可以通过内部控制制度完善、人员轮岗、思想教育等方面来减少风险。

总之，供应链金融还是一项比较新的金融业务，其业务的开展和风险控制需要我们在业务的摸索过程中逐渐予以完善，任重而道远。

standardized management

As goods are flowing, choosing 3PL companies with good performance, i.e., warehouse and logistics companies, can avoid goods being transferred, warehouse receipt being repeatedly mortgaged and other risks.

3.4 Control transportation risks

Consider whether transportation is accomplished by core enterprise, or whether the third party carrier has sufficient qualification; whether transit risks and loss responsibilities are clear; the consignee of bill of lading or the receiver indicated by consignment note should be the bank. Choose strong and reputable transportation company can also prevent goods being stolen and reduce the risk of goods replacement by transportation companies and loan companies.

3.5 choose suitable pledge

The pledge should have following characteristics:

3.5.1 Clear ownership

It should enable the bank dispose of the goods without other third party claiming rights. When pledging movables, the pledgor should provide movable property ownership certificate, say, added-value tax invoices, freight invoices, etc.

3.5.2 Steady price

Commodity whose price fluctuates violently is not suitable to be pledge, because firstly, more work should be done to mark to market. Secondly, it takes time to handle and thirdly, the price is easy to fall below the guaranteed loan.

3.5.3 Strong liquidity

It should be easy for the bank to dispose of and sell. Generally the pledge is basic materials, strategic materials, bulk materials, etc.

3.5.4 Easy to store

3.6 Staff risk

It includes two aspects:

3.6.1 Staff lacks of strong sense of responsibility, leading to negligence or mistake, like

documents are not rigorously made, mistakes are made in examining documents and inspecting goods and so on.

3.6.2 Staff colludes with external personnel, conducting document forgery, repeating pledge, embezzlement and other illegal deeds.

It is difficult to completely prevent staff risk. Generally the risk can be reduced through internal control system improvement, personnel rotation, moral education, etc.

In a word, supply chain finance is a relatively new financial service, and its operation and risk control need to be improved gradually. We still have a long way to go in this regard.



“2014深圳·滨海铁人赛” 大鹏湾畔火热开赛

文/谷欣 图/姚世欣、周建强、陈慰仲、吴中坚、闵先斌、吴平、戴卫兵



挑战大海、骑驰湾区、飞奔绿道，10月16日，“2014深圳·滨海铁人赛”在盐田区大鹏湾畔火热开赛，秉承山海文化与湾区经济相结合的赛事理念，249名“铁人”在蔚蓝滨海之畔，以热烈的体育竞技展示了区港共赢、港城共建的湾区活力。

在盐田区人民政府、深圳市文体旅游局的大力支持下，由盐田港集团主办、盐田港股份承办、特区建发集团翡翠岛广场赞助的“2014深圳·滨海铁人赛”是一项以挑战、拼搏、协作为元素打造的非商业性群众体育活动。碧海蓝天之畔，盐田港集团党委副书记、总裁童亚明致辞并宣布“2014深圳·滨海铁人赛”正式开赛，特区建发集团党委副书记李文雄、盐田港股份公司总经理乔宏伟分别为个人专业组、绿色之旅体验组选手鸣枪开赛，盐田港集团党委副书记陈德云，盐田港集团党委委员、大铲湾公司董事长周鹏，盐田港集团财务总监朱大华，盐田港集团董事会秘书彭洪波，盐田港建港指挥部副总指挥李群，盐田港股份公司监事会主席张永进，以及大铲湾公司总经理马卓等领导参加开幕式并为参赛选手呐喊助威。开幕式由陈德云副书记主持。

本次赛事设置了“铁人三项半程组”和“绿色之旅体验组”两个组别，半程组中“个人专业组”由运动员独自不停顿完成全部赛事项目，“团队接力组”每队三人，以接力方式完成全部赛事项目，组别的设置使得体力极强的选手与有专项特长的选手都可以在合适的组别展示自己的运动技能，吸引了来

自盐田港集团系统、特区建发集团、商学院代表队及盐田区相关单位的249名“铁人”爱好者们参与，其中个人专业组选手18名，团队接力组23队，绿色之旅体验组162人。

活动赛事沿盐田滨海风光旖旎的海岸线进行，游泳比赛赛程750米，自行车比赛赛程20公里，跑步比赛赛程5公里，全程共25.75公里。

经过激烈的角逐，物流公司丁志黎以1小时41分的优异成绩完成全部项目荣获个人专业组第一名，盐田国际何晓东及物流公司尧能武分获个人专业组第二、三名，成为“最强铁人奖”的得主；物流公司65号、大铲湾公司58号、股份公司57号代表队分别荣获团队接力组前三名，将“最佳协作奖”收入囊中。童亚明总裁、李文雄副书记、陈德云副书记等领导分别为参赛队员颁发了A组的最强铁人奖、最具拼搏奖、最佳毅力奖；B组的最佳协作奖、最佳潜力奖、最具耐力奖；C组的最强气势奖、最具斗志奖、最佳活力奖，以及独家赞助单位奖，以激励他们拼搏的斗志和挑战的精神。

“2014深圳·滨海铁人赛”的完美收官，代表着这项极具山海文化特色的群众性体育盛事，在将城市、港口与运动完美结合的同时，展示了深圳美丽的滨海风光，展现了深圳湾区发展的激情与活力，传递了盐田港人进取、拼搏、积极的工作态度和生活理念。



游泳



自行车



跑步



论内部培训师 管理制度的创建路径

文/郭飞（深圳市特区建设发展集团有限公司）



【摘要】内部培训是企业人力资源开发的重要途径，内训师团队的建立能够帮助企业提炼运营经验、梳理知识架构、培训储备人才，为此，应将内部培训师管理纳入企业经营和治理的事项之一。本文结合内部培训师管理体系的关键模块，提出一套从分类、选拔到考核、激励的制度指引，以供实务操作参考。

【关键词】企业培训、内部培训师、人员选拔

在激烈的市场竞争中，企业为了保障持续经营与发展，需要不断更新和传承经验与技术，建立学习型组织，从而保障企业的核心竞争力。根据知识管理“二八原理”，即20%的知识通过部分外聘讲师和内部培训师外部学习获得，80%的知识来自于组织内部。太多的外部培训会影响到企业内部知识体系的构建，太少可能会过于封闭；而80%的知识应来源于内部的知识体系，^①这些知识在组织内部不断地更新、循环、传递、实践，才能形成多层次的人才架构。鉴于此，企业应结合自身实际，建立稳定的内训师资团队和长效工作制度，合理择选外部培训资源，重点梳理内部课程体系，将整个企业的人力资源融合进内部培训范围内，促进企业生产和管理的提升。

现代企业内部培训发展历程概述

在欧美发达国家，由于近代商业活动的蓬勃发展，企业内部培训制度起步较早，1955年，美国通用公司成立了全球第一所企业大学——通用电气克顿维尔学院，标志着内部培训管理的独立化和成熟化，随后，越来越多的欧美企业创建了独立培训机构，如杰克·韦尔奇领导与发展学院（John F. Welch Leadership Development Center）、宝洁大学（P&G University）、惠普商学院（HP Business School）、麦当劳汉堡大学（McDonald's Hamburger University）、西门子管理学院（Siemens Management Institute）、戴姆勒-克莱斯勒大学（DaimlerChrysler University）等。这些学院都建立有不同层级、类型的课程，由企业的资深雇员、高校教授和行业专家组成师资队伍，为不同层级的企业人员开展针对性培训。欧美企业在培训内容上注重三个层次：知识培训、技能培训和素质培训，尤其对素质培训非常重视，如注重培养员工争取的价值观、企业理念、积极的工作态度、良好的生活习惯以及较高的追求目标。培训手段也很多样，如课堂指导、案例研究、商业游戏、角色扮演、内网视频教学、沙盘推演、虚拟现场、公开讨论会等。培训结束后，多数企业会通过培训结果评估，跟踪员工知识能力、

技术水平、工作行为的改变以及企业经营业绩的影响，将培训结果与员工的报酬、职务晋升、职业生涯设计紧密结合起来^②，使培训成效显性化。

上世纪六七十年代，以日本为代表的亚洲企业，通过推崇“终身雇佣制”、内部职业培训等制度，取得了令世界瞩目的发展成绩。在日本，企业大多采取“上下一致、一专多能”的培训方式。所谓“上下一致”，即上至最高经营管理人员（董事长、经理等）、中层管理人员（部长、课长等）、高级科技人员，下至监督管理生产人员（工长、组长）和一般工人、新就业者等各阶层人员都是教育的对象。而“一专多能”是指各级员工既要精通一门专业技术，又要能参与经营管理，如新职工和青年员工以业务知识和实操技能培训为主，随着职级的提高，专业知识教育会相应减少，有关管理决策、人际关系等方面的培训会增多^③，以丰富经营管理人员的知识结构。日本前首相佐藤荣曾说过：“日本能在短短的20多年内一片废墟上建成世界第二的经济大国，我有一句话可以奉告各位，我们日本拥有世界上最好的教育。”东京大学天野郁夫教授则进一步指出：“如果日本教育有什么秘密武器的话，就是企业再教育这个法宝。”^④，同时，管理学大师德鲁克也指出，“战后的经济列强首先是日本，然后是韩国、台湾、香港、新加坡——都把自己的兴起归功于泰勒的培训”。它使它们能很快地就让基本上仍是工业化前的、低工资的劳动力变为世界级的生产力。战后时期，泰勒的培训成了经济发展唯一真正有效的手段。”^⑤由此可见，这些国家和地区的著名企业在培训管理上的成功运作，是其经营业绩快速提升的重要保障之一。

国内企业在内部培训管理中的典型问题

相比而言，我国企业也有内部培训的长期传统，其中“传、帮、带”等学徒工制度就是对内部培训师制度早期

尝试的典型代表^⑥。在改革开放后，随着企业管理现代化水平的提升，内部培训也从手工操作技能的传授，向管理经验、管理思想等更高层次的传承方向发展。国内的著名企业如海尔、华为、万科、腾讯以及电力、金融、通信等大型国有企业，均建立了自有培训中心或研究院，开展知识教育、更新、开发工作，但是多数企业在内部培训队伍建设和管理方式上，还处于较为薄弱的状态，不仅影响了企业培训工作的质量，还影响了员工和企业的发展。总体而言，国内企业在开展内部培训工作上存在如下普遍现象：

（一）内部培训人员的地位与外部培训讲师往往存在明显差异

不少公司一提到开展业务培训，就是将人员送去外部机构上课，或者邀请某位行业专家来讲课，并且把外部培训师视为是专家莅临，把内部培训师视为是员工下属，过于抬高了外部培训的价值。在这样的观念影响下，为内部培训师建立的职业发展体系、报酬体系等制度，自然会受到明显削弱，造成内外差异，从而影响内训师团队的工作投入。

（二）内部培训工作的价值容易因授课水平的制约而被轻视

绝大多数企业受限于经营规模和成本因素，均由内部人员兼职内训工作，这些人员在知识结构、语言艺术、培训经验等方面，与外部职业讲师存在一定差距。然而，内部培训师团队的价值，不在于课堂上的妙语连珠，而在于通过资料编写和业务培训，夯实企业知识基础，保存过往成熟经验，建立企业自己的人才培养制度，汇集企业有形资产之外的知识财富。

（三）内部培训管理的粗放使劳动付出得不到对应的激励

① 林国木、徐红宇，企业内训师体系构建之探究[J]，现代企业教育，2013年6月下期，第65页

② 冯林林，中美企业员工培训比较——关于投入、内容及方法[J]，人力资源管理，2011年第4期，第32页

③ 林新奇，日本企业员工培训的组织保障[J]，经济与管理研究，2006年第10期，第57页

④ 张燕，日本企业内职业教育与培训的文化透视[J]，中国职业技术教育，2007年第26期，第57页

⑤ “泰勒的培训”是管理学家弗雷德里克·泰勒（Frederick Winslow Taylor, 1856—1915）基于一项成功实验归纳出的科学管理要点：第一是精心挑选工人，第二和第三是诱导工人，之后是对其进行训练和帮助，使之按科学方法去干活。

⑥（美）F·W·泰罗，科学管理原理[M]，中国社会科学出版社，1984年，第238页

⑦ 吕波，基于“双重管理”模式的企业内部培训师选拔与考核[J]，继续教育，2009年第12期，第32页

不少企业都建立有基于工作业绩和工作年限之上的晋升管理制度，但容易忽视兼职培训人员作出的工作贡献，既没有考核机制推动内部培训人员积极主动提升，也没有激励机制认可内部培训师的额外劳动付出，这种粗放式的管理制约了企业整体内训工作水平的提升。

（四）多数企业忽视了主动营造对内部培训人员的尊重氛围

能够担任内部培训的人员，往往是部门管理者或业务骨干，很多企业将内训工作当作是一项普通的人力资源事务，没有在企业内营造尊重内部培训师的文化氛围，没有积极提升内部培训师的专业威望，忽视了在培训结束后，鼓励他们作为专业小组带头人，汇集相关领域的人员形成专业交流圈子，间接带动各专业后备人员的成长。

本集团内部培训师管理制度的创建路径

本集团所属的业务领域多样，近几年一直在进行人员招聘和内部架构完善，多个项目全面推进，对人员知识和技能的更新提出了较高要求，因此，稳步推进内部培训，有利于培养专业骨干，牵引公司知识管理，促进各层级人员岗位胜任能力的提升。

作为处于起步阶段的内部培训工作，核心是选拔一批内部培训师，并建立相应的考核、激励、职业发展制度，本文就这几个方面提出了较为精练的制度构思：

（一）内部培训师分类及职责

根据集团的组织架构，内部培训师分为两级管理模式，并且结合专业特点和培训需求，进行了细化分类，具体分类如下：

内部培训师分类	内部培训师描述
集团级内部培训师	由集团公司人力资源部统一甄选、调配、培养及考评，并承接全集团培训计划内的课程。根据专业方向，内部培训师分为管理、技术、业务、综合四类；级别分为初级、中级、高级和专家级。
子公司级内部培训师	由子公司人力资源部自行甄选、调配、培养及考评，并承担本单位一线员工基础知识、技能培训。

集团级的内部培训师授课对象是全集团（含子公司）人员，根据参训人员的级别和课程类型，调配不同级别的内部培训师参与：

1. 初级内部培训师主要针对全集团一线员工进行基础知识和技能课程的讲授，如应届毕业生岗前培训、社招人员入职培训等；

2. 中级内部培训师主要针对全集团一线员工进行素质提升类课程的讲授。如沟通技巧、谈判方法、营销策略、项目协作等培训；

3. 高级内部培训师主要针对全集团中高层管理者和资深员工进行内训授课，如行业前沿动态、管理思维分享、团队管理经验等。

4. 专家级内部培训师主要针对全集团中高层管理者进行内训授课，并且牵头进行经营案例的总结提炼，项目研究、论文编著等工作。

5. 子公司级内部培训师主要承担各单位自行组织安排的培训课程开发、优化及讲授，并协助各单位培训管理人员开展培训组织实施工作。

（二）内部培训师的选拔

有意成为内部培训师的人员，需首先参加TTT（Training the Trainer to Train）培训，强化教材自编、教案规划、授课PPT制作、语言表达方面的能力，树立对教学目标的正确认知，提升个人自信心和授课仪态。培训结业后，可在本级单位的推荐下，参加一年一度的选拔。

选拔委员会由集团分管领导、专业部门管理者及人力资源部负责人联合组成，评估成绩由业务能力、专业答辩和绩效三部分组成，其中业务能力评估采取直属领导、所属专业部门及人力资源部综合评估的方式，专业答辩根据内部培训师级别主要采用课程试讲、情景测试方式，最后按比例折算最终得分，根据排名择优聘任。

（三）内部培训师的考核与晋升

获得聘任的各级内部培训师，每年要参加评估考核。考核成绩由积分和绩效组成，积分包括基础积分和加分项两部分，其中基础积分由课程讲授、案例编写、课程开发、课程优化和专题研究组成，加分项由创新成果、论文发表和奖励表彰组成；绩效按年度工作业绩考评得分计算。

根据年度总评成绩对认证内部培训师进行级别动态管理，成绩排名靠前（如前10%）的内部培训师可进行升级，

成绩排名靠后（如后10%）的内部培训师进行降级或解聘。

（四）内部培训师的培养

每年公司应列支预算用于培养内部培训师，帮助其不断提升专业水平，为此，可按专业领域和内训师等级提供两个培训计划：

1. 可按照技术、综合、管理、业务线提供业务提升培训，主要目的是强化内部培训师的专业知识，开阔视野。

2. 按内部培训师等级，给予针对性的资质培训、内部交流、外部交流，目的是强化内训师的自我认同感，讨论团队工作思路和计划，与外部同行交流经验等。

（五）内部培训师的激励

对于内部培训师的激励分为经济激励和非经济激励两类。

1. 经济激励方面，可提供课时费、津贴和年终鼓励奖。

通用课程的课时费可按学员的满意度系数进行折算。而专题讲座的课时费建议不考核满意度，以增加内部培训师与各单位之间的知识交流和委托研究。

津贴在全年兼职承担课程开发、文著编写、项目研究所给予的补助。对于全年内部培训表现突出的个人，建议给予适当的鼓励奖。

2. 非经济激励方面，可提供职业发展、评选表彰、外派交流、形象宣传等。

（1）职业发展主要表现在岗位晋升、员工绩效考核、后备干部选拔以及评优等方面，优秀内部培训师可作为优先考虑的条件之一。

（2）根据年度内部培训师考评结果，对年度优秀内部培训师并给予表彰。

（3）内部培训师可以受邀参与与外部相关机构进行的沟通交流活动。

（4）公司可以多种形式宣传内部培训师，推广品牌课程，提升他们的知名度。

（六）内部培训课程的知识产权与保密管理

内部培训师开发和优化的培训讲义、案例、视频等材料，应经专业部门和人力资源部门审核通过后方可使用。

内部培训师为公司进行的课程开发、项目研究、案例编写等成果，应与公司签定保密及知识产权归属协议，约定知识产权为公司所有，作者拥有署名权。当内部培训师离职时，人力资源部将收回培训资料。

综上所述，内部培训管理是一项长期、细致的工作，只有优先做好内部培训师队伍和课程的管理，才能逐步获得良好的人才培养效果。内部培训师团队的建设，不仅有利于选拔公司的业务培训人才，还有利于形成以中高级内部培训师为带头人，各专业线人员汇聚的专业团队，营造知识分享、互相鼓励的学习氛围。这对本集团迎面行业的快速发展，构建人力资源竞争优势，具有显著的价值。

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浅析云计算时代下 企业财务管理的创新

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云计算是当前信息行业比较流行的话题，它是一种计算行为或技术风格，特点是在互联网上提供一种动态可扩展的虚拟资源服务。为了满足这种动态可扩展性的要求，云计算服务商必须建立和依靠大型数据中心，它们通常分布在一个国家的各个地区，甚至世界其他国家和地区。从信息技术的角度看，云计算是工业化的进一步发展，它有望改变信息技术行业的整体结构。通过使用云计算的服务，软件服务商或开发者不需要自己拥有大量的计算资源（包括计算机服务器硬件和软件）和信息管理人员，就能开发和运行支持多用户的网上软件，或为客户提供托管和使用网上软件的服务。

在网络经济、电子商务的时代，财务管理由桌面管理走向网络管理已经是大势所趋。“云计算”是一种软件创新模式，它把财务外包和财务内包紧密的结合，而且降低了软件应用和软件开发的相关成本，在根本上创新了财务管理的理念，引导财务管理走向新领域。

一、财务管理环境的变化

网络经济时代，由于经济活动的数字化、网络化，出现了许多新的媒体空间，如虚拟市场、虚拟银行。许多传统的商业运作方式将随之消失，而代之以电子支付、电子采购和电子定单，商业活动将主要以电子商务的形式在互联网上进行，使企业购销活动更便捷，费用更低廉，对存货的量化监控更精确。这种特殊的商业模式，使得企业传统的财务管理已不能适应基于互联网的商业交易结算。财务管理作为企业经营管理的核心部分，无论在管理环境、技术方法运用，还是在职能执行以及管理观念等方面都受到网络的强烈的冲击，应更新财务管理观念适应新的经济模式。

1、经济环境的变化

在网络经济时代，一些独立的厂商、顾客、同行的竞争对手通过信息技术联成临时的网络组织，以达到技术共享、费用分摊以及满足市场需求的目的，求得共同的生存与发展。技术变革要求企业变为松散、精简和更加灵活的结构。总公司重点从事设计、组装和开发市场，生产分包给外围公司，公司之间构成各种协作关系。大公司之间组成战略同盟，大公司与小公司构成几何网络企业。一种虚拟的动态

联盟组织适应时代的需求产生，供产销形成一个完整的链条，企业的财务管理功能将延伸到企业之外。

2、技术环境的变化

以网络技术为主的各种信息技术为企业的财务管理提供了更广阔、更先进的技术手段与方法。企业可以以柔性技术为基础保护技术的领先，以信息网络为依托实现资源整合，将网络与财务相结合形成网络财务，并且开发网络财务软件，实行动态的、实时的财务管理。

3、金融环境和社会环境的变化

电子货币成了网络交易市场的主要货币流通结算工具，互联网的延伸使得全球外汇市场每天24小时都可以进行交易，人们可以在全球范围内将资金以“光的速度”从一个地方转移到另一个地方，并且流通费用、交易成本大大降低。电子货币形态的资金将成为企业筹资、投资、分配的主要形式之一。网上银行的建立为网络经济的正常运转提供了安全、可靠的金融保障。网络经济时代技术变革相应会带来社会变革，企业组织和工作结构、社会工种的变化也将影响到企业的财务管理。

企业财务管理环境的改变，是财务管理技术方法、职能、观念革新的前提，同时也是其直接影响因素之一。

二、企业财务管理的创新

网络经济的一个重要标志是人类生产经营活动和社会活动的网络化。财务管理必须顺应潮流，充分利用互联网资源，从管理目标、管理模式和工作方式等多方面进行创新。

1、财务管理目标的创新

企业财务管理目标总是与经济发展紧密相连的，总是随经济形态的转化和社会进步而不断深化。随着网络经济的到来，客户目标、业务流程发生了巨大变化，具有共享性和可转移性的知识资本将占主导地位。知识的不断增加、更新、扩散和应用加速，深刻影响着企业生产经营管

理活动的各个方面，客观需求企业财务管理的目标必须向高层次演变。

2、财务管理模式的创新

在互联网环境下，任何物理距离都将变成鼠标距离，财务管理的能力必须延伸到全球任何一个结点。财务管理模式只有从过去的局部、分散管理向远程处理和集中式管理转变，才能实时监控财务状况以回避高速度运营产生的巨大风险。企业集团利用互联网，可以对所有的分支机构实行数据的远程处理、远程报表、远程报账、远程查账、远程审计等远距离财务监控，也可以掌握和监控远程库存、销售点经营等业务情况。这种管理模式的创新，使得企业集团在互联网上通过Web页登录，即可轻松地实现集中式管理，对所有分支机构进行集中记账，集中资金调配，从而提高企业竞争力。

3、财务工作方式的创新

互联网技术改变了全球的经济模式，相应地必须改变财务人员的工作方式。财务管理者无论身在何处都可以实时查询到全集团的资金信息和分支机构财务状况，在线监督客户及供应商的资金往来情况，实时监督往来款余额。企业集团内外以及与银行、税务、保险、海关等社会资源之间的业务往来，均在互联网上进行，将会大大加快各种报表的处理速度，这也是工作方式创新的根本目的。

4、财务管理软件的创新

运用Web数据库开发技术，研制基于互联网的财务及企业管理应用软件，可实现远程报表、远程查账、网上支付、网上信息查询等，支持网上银行提供网上询价、网上采购等多种服务。这样，企业的财务管理和业务管理将在Web的层次上协同运作，统筹资金与存货的力度将会空前加大；业务数据一体化的正确传递，保证了财务部门和供应链的相关部门都能迅速得到所需信息并保持良好的沟通，有利于开发与网络经济时代相适应的新型网络财务系统。

三、实现企业财务管理创新的构想

企业财务管理创新是新形势下企业发展的当务之急，也是网络经济全球化的客观要求，在此提几点实现创新的构想：

1、转变企业理财观念

网络经济的兴起，使创造企业财富的核心要素由物质

资本转向知识资本，企业理财必须转变观念。首先，要认识知识资本，即了解知识资本的来源、特征、构成要素和特殊的表现形式。其次，要承认知识资本，即认可知识资本是企业总资本的一部分，搞清知识资本与企业市场价值和发展的密切关系，以及知识资本应分享的企业财富。第三，要重视和利用知识资本。转变企业理财观念是实现财务管理目标创新的根本保证。

2、加强网络技术培训

网络技术的普及与应用程度直接关系到财务管理创新的成功与否。有针对性地对财务人员进行网络技术培训，可以提高财务人员的适应能力和创新能力，有利于在网络经济下实现财务管理创新。

3、积极开展对知识资本的理论研究

网络经济的发展将使财务管理目标转向知识最大化，但目前知识资本的理论尚未成熟，必须积极开展理论研究和实践。知识资本是一种无形资本，对知识资本的管理是新形势下企业理财的重大创新。对此，首先应研究知识资本的构成要素及其市场化形式，探讨知识资本的有效运作管理方法。其次，要研究知识资本的计量方法，确定知识资本价值，研究知识资本的证券化形式和估价方法。第三，要对知识资本运作的案例进行分析，总结企业知识资本运作的具体操作方案。第四，研究知识产权保护问题，它是知识资本保值增值的基本前提。总之，知识资本是网络经济下一种新的资本形态，对知识资本的理论研究也是实现财务管理创新的基本条件。

4、对企业进行业务流程重组

网络经济是一种全新的贸易服务方式，它以数字化介质替代了传统的纸介质，将打破传统企业中以单向物流运作的格局，实现以物流为依据、信息流为核心、资金流为主体的全新运作方式。这就要求企业必须对现有业务流程进行重组，将工作重心放在价值链分析上。首先，企业要从行业价值链进行分析，以了解企业在行业价值链中的位置，判断企业是否有必要沿价值链向前或向后延伸，以实现企业管理目标。其次，对企业内部价值链进行分析，以判断如何降低成本，优化企业流程。第三，从竞争对手价值链分析入手，通过与竞争对手的相应指标进行比较，找出与竞争对手的差异和自己的成本态势，从而提高整体竞争力。

5、建立财务风险预测模型

随着互联网在商业中的广泛应用，在企业内部作为数据

管理的计算机往往成为逃避内部控制的工具，经济资源中智能因素的认定将比无形资产更加困难。由于网络经济的非线性、突变性和爆炸性等特点，建立新的财务风险预测模型势在必行。该模型应该由监测范围与定性分析、预警指标选择、相应阈值和发生概率的确定等多方面的内容组成，并能对企业经济运行过程中的敏感性指标予以反映。

6、采用集中式财务管理模式

互联网的出现，使桌面管理转化成非桌面化的网络方式有了技术保证，也使得集中式管理成为可能。企业可以综合运用各种现代化的计算机和网络技术手段，以整合实现企业电子商务为目标，开发能够提供互联网环境下财务管理模式、财会工作方式及其各项功能的财务管理软件系统，该系统至少应包括会计核算的集中化、财务控制的集中化、财务决策的集中化三部分。采用集中式管理，将会提高财务数据处理的适时性，减少中层管理人员，使最高决策层可与基层人员直接联系，管理决策人员可以根据需求进行虚拟结算，实时跟踪市场情况的变化，迅速做出决策。

7、创建企业财务管理信息系统

以数字化技术为先导的网络经济，其经济活动可以通过互联网在线进行，产生的会计信息都是动态的，更具有不可捉摸性；同时，市场需求信息的公开化，形成了多层次、立体化的信息格局。谁能占领信息的制高点，谁就将

在市场竞争中占优势。创建基于互联网的企业财务信息系统，综合运用计算机网络的超文本、超媒体技术，使信息更形象、直观，提供多样化的各类信息，包括数量信息与质量信息、财务信息与非财务信息、物质层面的信息和精神层面的信息等，实现信息理财。

8、建立网络信息安全保障体系

要制定相关的法律政策，以法制手段来强化网络安全。要从管理上维护系统的安全，建立信息安全管理机构和切实可行的网络管理规章制度，加强信息安全意识的教育和培训，提高财务人员素质，特别是高层管理者的安全意识，以保证网络信息安全。还要从技术上采取措施，在企业内部网和互联网之间加一道防火墙，防止黑客或计算机病毒的袭击，保护企业内部网中的敏感数据。另外，将数字签名技术应用于电子商务的身份认证，可以防止非法用户假冒身份，从而保证电子支付的安全，为实现财务管理创新提供重要保障。

随着网络时代的到来，以网络为基础的电子商务的极大发展改变着全球的经济模式、企业的经营管理模式以及人们的工作、生活和消费模式。这不仅给全球经济和社会带来巨大变革，也给企业创造了无限的商机。财务管理作为企业经营管理的核心部分，无论在管理环境、技术方法运用，还是在职能执行以及管理观念等方面都受到网络的强烈的冲击。企业财务管理的发展必须与新经济的基础相适应，这使得传统的财务管理必须有新的发展。

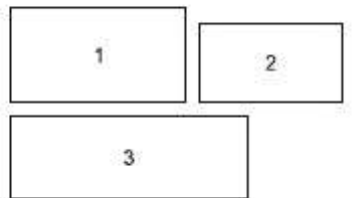
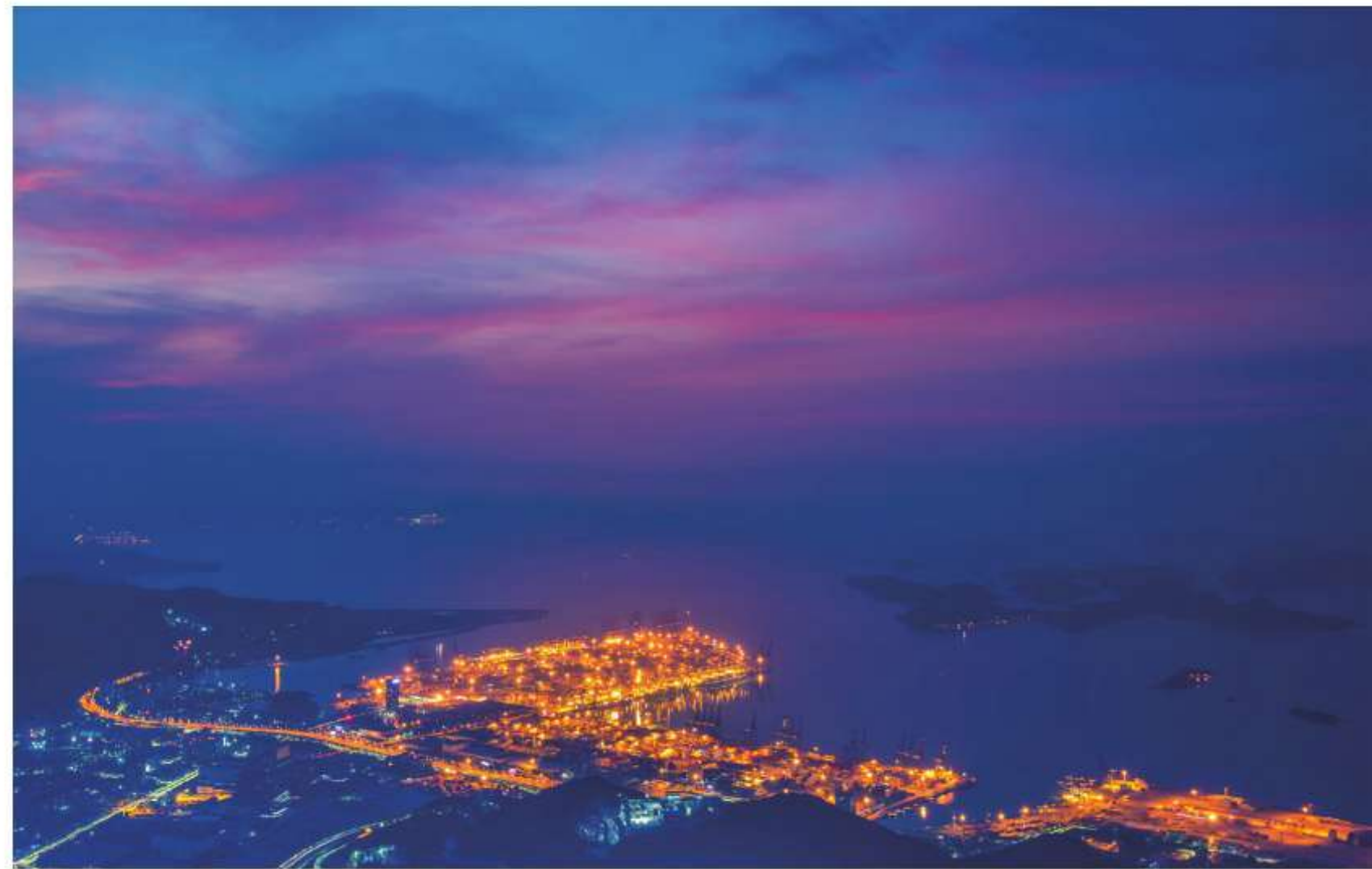


视觉
View

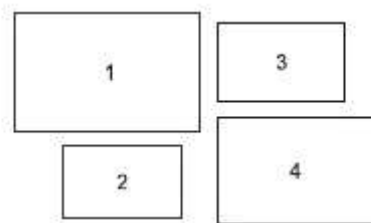
周建强摄影作品集



港之新月



- 1、港之光韵
- 2、港之暮色
- 3、港之圆月

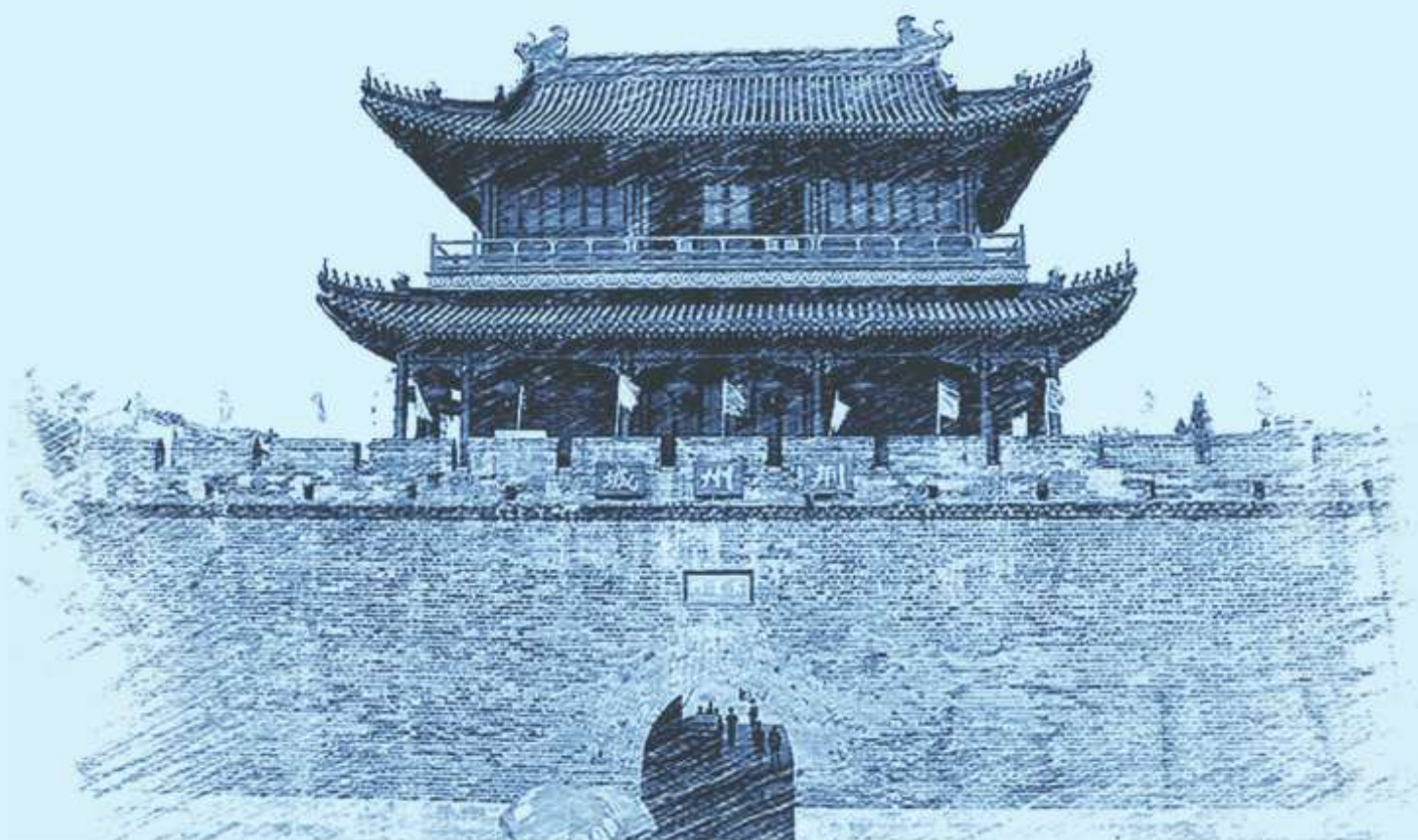


- 1、璀璨鹏城
- 2、流光溢彩
- 3、月亮弯晨曦
- 4、疑似彩虹耀香江



荆州之旅

文/子尚



国庆节1号，忽然想来一场说走就走的旅行，于是买了2号深圳到荆州的高铁黄牛票，带着女儿两人直奔荆州市，当晚抵达荆州城，一觉醒来，便是荆州的过早。早酒是当地的习俗，长港路的马老大清真牛羊杂馆人头簇拥，过早的人络绎不绝，我们好不容易要了位置，点上一个牛肉火锅，一个羊肉火锅，一个羊杂汤，39度的马奶酒，加上牛肉米粉，充满能量的早餐结束后，我们奔向了荆州博物馆，可谓人山人海。我们直奔主题，西汉的一具古尸，距今有2500年历史了，女儿怀着忐忑不已的心情观摩玻璃棺内的古尸，古尸为男性，1.66米高，约60岁，为楚国的贵族。荆州博物馆是国家一级博物馆，馆内一级文物众多，有越王勾践剑、青铜鼎器、玉器、丝绸、漆器等。我是第三次来荆州，当起了女儿的导游，如数家珍介绍着中国古代灿烂的文明。楚国有800年波澜壮阔的历史，其中鼎盛时期的400年以荆州纪南城为都，首创了南方古长城、第一个县、第一支毛笔和第一把铁剑。奇诡瑰丽的文物，让我们穿越回历史的天空，楚人崇凤，巧夺天工的虎座鸟架鼓是氏族图腾的代表文物之一，凤是神鸟中的雄鸟，凰是雌鸟。楚国为周朝册封的诸侯国，楚王是黄帝的子孙后代，姓熊，历经40多位君王，成为春秋的五霸和战国的七雄之一。

午餐不同凡响，鄂都南路的新盟渔村据称是荆州目前最全的渔寮，有长江的江鲮、江鲢、财鱼刺身四吃，包括凉拌鱼皮，酥炸鱼骨和笋丝高汤。江鲢是黄骨鱼中的极品，由于生长在水流湍急的长江，嘴角的胡须已经被激流经年冲刷而退化，肉质鲜嫩清美，醇香可口。荆州人喜欢吃财鱼，一般采用水煮的做法，新盟渔村是新派的荆州菜，借用了广东客家淡水鱼生的烹饪技法，用嫩姜洋葱香油搅拌着鱼生至入味，然后佐酒生吃。荆州地处中原，然而当今的物流发达不可同日而语，新盟渔村的海鲜池除了长江的江鲜，还有龙虾、海虾、多宝鱼、石斑鱼等生猛海鲜，真是翻江倒海了来吃，应有尽有。酒足饭饱之后，步出酒楼，门前还有一个长方形的清水大池，三条2米多长的养殖中华鲟在阳光下游来游去，令食客们展开无限的遐想。



下午，距荆州城西北45公里，熊家冢遗址博物馆刚刚开放两年，据初步考究为楚悼王的墓，有主冢、陪冢，车马阵，陪冢和车马阵初步挖掘出来100多座，均为活人活马和真车殉葬，教人倒抽凉气，我们隔着特制的玻璃近看2400年前的楚王真车马阵，有天子驾六，也有架四和二，战马已经石化，挂有玉佩和饰金的饰物，恢宏大气，皇恩浩荡，西安的秦始皇兵马俑虽然举世闻名，但是均为陶俑陪葬，而楚王的车马军阵乃真刀真枪入墓，历史的价值更胜一筹。我们爬上已经形成一座小山的主冢，脚踏在山顶上，听着导游解说脚下深埋着楚王的棺椁，面积达248平方米，是中国已知帝王中最大的棺椁，可惜技术资金多方的原因未能挖掘，让人感叹世界上最遥远的距离，就是我明明站在你的面前，却是生与死的距离。楚王杀气凌厉，据传熊家家开挖车马军阵的时候，有三位民工莫名其妙暴毙，给世人增添了神秘诡异的无穷臆测。他日如果能将熊家冢的主冢打开，必定是石破天惊的惊世考古发现。

晚宴在德馨路的荆楚上品，菜品有荆沙鱼糕、荆沙甲鱼干锅、洪湖野鸭煲、监利鳊丝、石首笔架鱼肚汤等。和当地的老朋友聚在一起，觥筹交错，美酒佳肴，可谓写意的人生。鱼糕是荆州人的头道菜，无糕不成席，上品的鱼糕选用10斤重的草鱼，放血至干净，去鳞漂洗纹蓉，加上肥猪肉丁，蛋清、绿豆粉、拌匀后入笼蒸至八成熟，最后一道工序是表皮抹上蛋黄，寓意飞黄腾达，步步高升，达致吃鱼不见鱼、唯有百合糕的空灵境界。荆沙甲鱼也是荆州的传统名菜，可追溯至战国末年《楚辞·大招》中开列的宴席单里的菜名，具有滋阴凉血润燥的功效，可算是药膳。长江的石首段，九曲回肠的形状，稀有特产为石首鮰鱼，其鱼鳞形如笔架，色似白玉，细嫩如脂，口感松软香甜、入口即化，富含高级胶原蛋白，采用老母鸡熬成的高汤锅煮笔架鱼肚，是名扬古今的一道贡品佳肴。

第二天启程前往荆州西边60公里的松滋市。松滋流水生态岛不可错过，位于武陵山余脉，是亚洲第一的人工土坝，国家级水利风景区和国家级森林公园，也是一个湿地公园，核心景区达52平方公里，我们乘坐着两层的游轮，在碧波浩淼的湖面上辟浪前进，据悉水质甘冽，属于国家地表一级直接饮用水，赛过千岛湖。游轮每到一个小岛都有一个临时停靠的小码头，人们可以登岸上岛，领略千姿百态的湖光山色，可惜我们的时间只有两个小时，无奈错过了溶洞的鬼斧神工：乾坤神柱和天宫大幕。我们买来岛

上盛产的柚子和橙子，一边品尝天然的水果，一边观摩岛上的黄牛在浅水滩里悠然休憩的样子，偶尔飞来几只洁白的水鸟扑进水面觅食，顿时感到时间都去哪里了？原来都凝固在一副美轮美奂的山水画里面了，而我们正在画的中央。友人说冬天的流水更加美不胜收，即赋诗一首《流水》赞曰：巨坝围拦千壑水，澧湖渔鼓湘鄂间；云烟浩淼群峰静，白鹭惊飞雪纷纷。

岛上的旅游局招待酒楼“食园”是午餐的好去处。靠山吃山靠水吃水，水至清则无鱼，有鱼乃大，一锅水库大鱼热腾腾上了桌，还有湖滨浅滩生长的黄牛肉火锅，天然的土壤和水质种植的小白菜，以及岛上裸露岩石上接受大自然阳光和雨露滋润而成的地衣炒蛋，辅以刁子鱼、鱼糕等流水的上产，让舌尖体会到了大自然的的味道。白云边的产地恰好是松滋，所以，当松滋的水滋养的食材和酿成的酒在舌尖上交汇和融合的时候，家乡的味道油然而生，走心般顷刻注入到了胃里。

东晋年间，安徽宿松县人逃避战乱来到此地，宿松原名松滋，故取名松滋至今。松滋河由北至南，贯穿着松滋这座美丽的小城，平缓而澈净。晚宴在楚湘园，有新上市



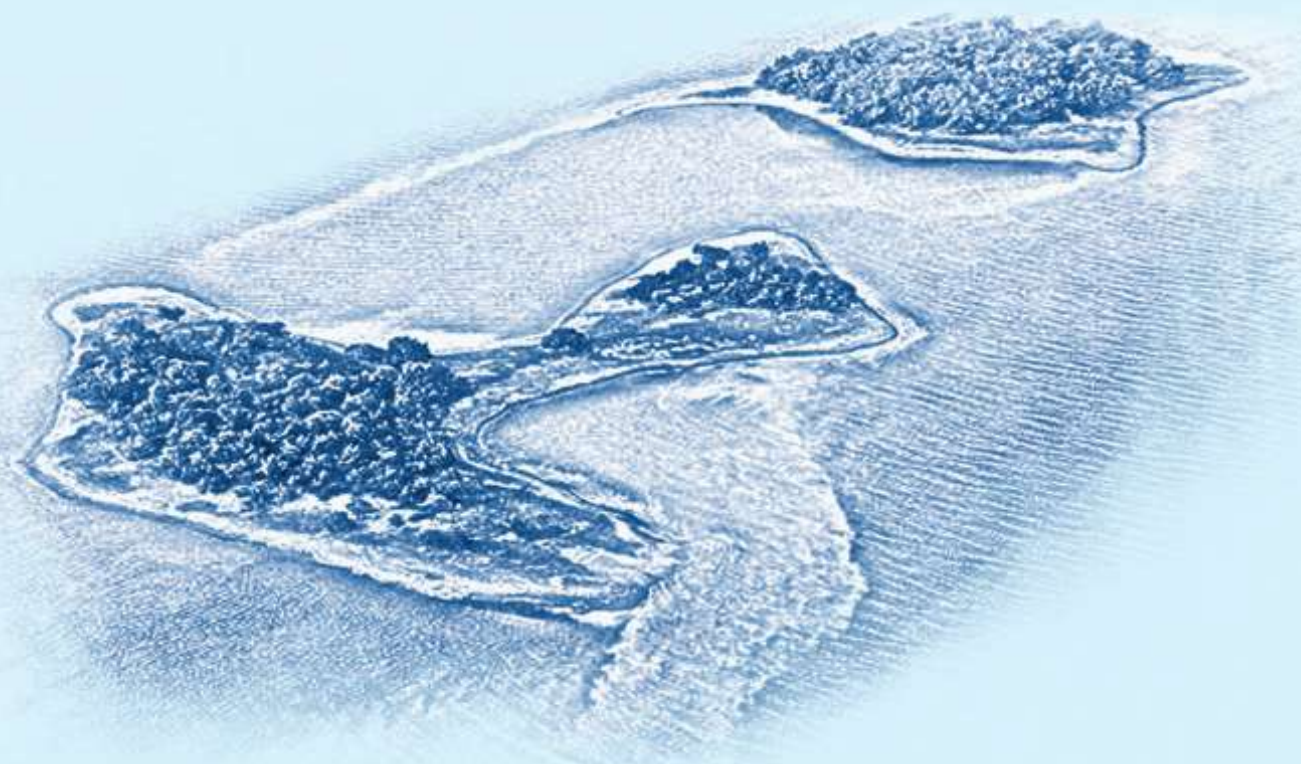
的羊肉火锅、蚕豆、黄骨鱼肉丸煲，沙道观杜婆鸡煲，本地土鸡，洗净切成大小均匀的小块状，用旺火将鸡块用油煎焖，放入精盐、姜块、料酒、蒜苗、啤酒、茴香、豆瓣酱、干红辣椒皮，干焖好，最后配上土钵放水烹炖上桌。藕汤是湖北家喻户晓的一道汤，以洪湖的藕为佳，一种是铁藕，红色含铁，是粉质的口感，还有一种是白藕，吃起来脆滑，别有风味。今晚喝的是铁藕龙骨汤，新鲜的粉香沁人心肺，我们觉得好吃，一碗一碗接一碗，赞不绝口。

第三天前往荆州的北面约80公里的当阳市，古称麦城，关羽当年败走麦城即是这里。湖北是三国文化遗址的大省，魏蜀吴的争斗以鱼米之乡的荆州地区展开了激烈博弈。关羽在荆州主政了10年，最后在麦城战败，葬在了当阳的关帝陵。市区有长坂坡公园，范曾立有碑刻“常山赵子龙”，纪念赵子龙于长坂坡八十万曹军阵中以万夫不当之勇救出刘备的儿子刘禅的英雄史诗般的典故。当年曹操就站在长坂坡这一小块平坦的高地上，瞭望战场形势，发现赵云勇猛异常，便想降服为己有，于是下令不准放箭，赵云又在乱军中夺得曹将夏侯恩帮曹操携带的“青罡”宝剑，冷兵器时代是一把削铁如泥的宝剑，于是赵云如入无人之境，七进七出，斩杀了曹将53名，士兵无数，冲出了铁笼般的重围，为蜀国最后立国留下了汉室血脉。当阳车站附近还有一个立马亭，张飞一声怒吼喝退百万曹军的传

奇就发生在这里，当年刘备在当阳被曹操击败，仓皇撤退，曹操亲率精锐虎豹骑穷追不舍，追到长坂桥时，张飞领二十多名骑兵，立于桥头，手拿长矛，厉声怒喝：“我张飞就在这里，谁敢来和我决一死战！”，曹军阵中夏侯杰竟然吓破了胆摔死马下，于是无一人敢靠前，百万雄兵被吓退。清雍正时期立有石碑纪念，上刻“张翼德横矛处”。蜀国的五虎上将，有三位都在当阳留下史迹，不可不谓三国名城。我指着这些三国的历史遗迹，向女儿讲解着三国的故事，解决她写作文题材缺乏的烦恼。

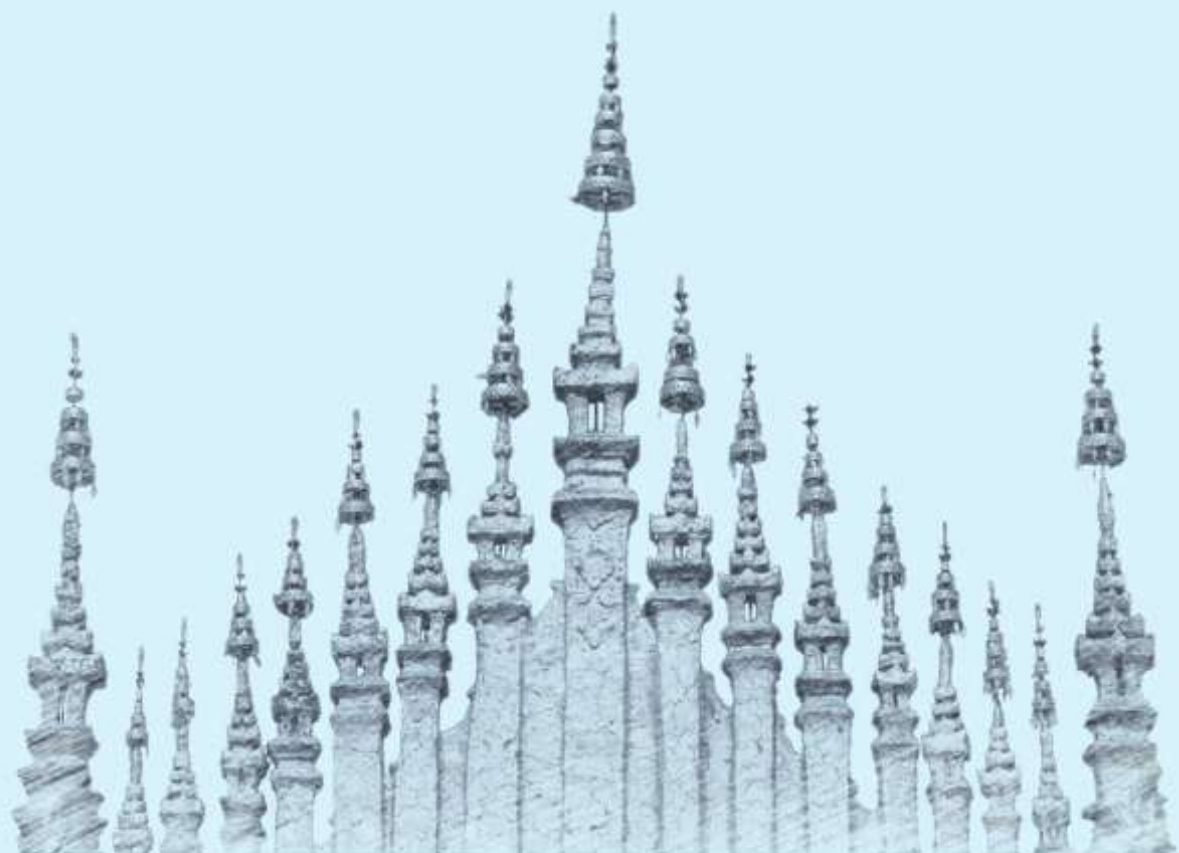
回到荆州市，兴致勃勃前往荆州博物馆楚乐宫。楚乐宫的舞台，以编钟为主打，石磬、排箫、古筝、古琴、笛子等交响演奏，再现二千多年前楚国宫廷乐舞的艺术范。古老的青铜编钟，浑厚绵长的历史旋律，宫中舞女的翩翩风姿，博大精深，余韵不绝。楚乐包括“荆楚八音”和“楚十二律”。当年我国第一颗人造卫星在太空中播出的《东方红》乐曲，即由这一套编钟石磬演奏而成。

我们听着这飘飘楚乐，忘记了工作的疲倦，感觉到生活的美好，一个好的旅行家绝不知道他往哪里去，更好的甚至不知道从何处来，他甚至忘却了自己的姓名。三天的荆州之旅在一片天籁般的楚乐声中结束。



琅勃拉邦 早安

文·郭康鹏



出发去老挝前，朋友一再问我旅行的攻略做得是否充分？我说我期待的旅行是随性的，不刻意的去计划。对于这座位于老挝北部山区的小城琅勃拉邦，千万不要抱着很强的目的性和游客的心态去亲近，在那里我应该让自己变成一个随遇而安的路盲，或许这样会收获更多的意外与惊喜。

不久前看了《早安，琅勃拉邦》，它是老挝历史上第一部故事电影，讲述了一个老挝籍的澳洲摄影记者舜为了工作回到老挝，在旅行中爱上了当地一名美丽善良的导游小小的故事。美女、帅哥、加上明媚的热带风光，配上简单柔美的主题音乐，整部电影活脱一部旅游风光片。值得一提的是，影片虽然是以琅勃拉邦为题，事实上大部分的故事和风光都是在老挝的南部，而琅勃拉邦只是在故事最后出现，男女主人公相约一年后，再次相遇在琅勃拉邦的早市中，故事到此戛然而止，然而我相信爱情却是刚刚开始。

正是因为这部电影，美丽的风光和感人的故事，勾起了我对老挝这个神秘的国家及琅勃拉邦这个浪漫的古城的莫大兴趣。怀着一颗装文艺的心，我试图幻想着像无数个电影桥段那样在琅勃拉邦要将小资进行到底。早上六点起床，七点钟嘟嘟车就来到首都永珍的酒店门口接我，然后又满城穿梭，接到了六个来自不同国家的背包客，用时近四十分钟才到了长途汽车站，曾一度我怀

疑是否英语太差，没有交代清楚，是让我们搭乘嘟嘟车去五百公里开外的琅勃拉邦。乘坐大巴车，经历了十个小时的乡间公路的流离颠簸，天黑才到达琅勃拉邦客运站。油头泥面，饥肠辘辘，又跟几个老外拼了一辆嘟嘟车借着月色直奔湄公河边，瞬间被自己的屌丝形象石化了，跟文艺扯不上半点关系。

伴着朦胧的月光和星星点点的路灯，背着行囊，在湄公河畔边走边找客栈，坐了一天的长途汽车，走路活动一下也蛮舒服，很快便在距离河边不到五十米找到了一家独栋的木屋别墅客栈，主人们住几间，剩下的都作为客房，价格便宜也很干净，还有自助的咖啡、茶和香蕉。入住后，洗个澡，换身干净的衣服，来到夜市，吃根法棍面包，喝杯老挝咖啡，犒赏一下自己，早点休息，用最好的状态迎接明天，琅勃拉邦，明早见。

清早，睡到自然醒，听到窗外客栈主人养的鸟儿在欢叫，边伸懒腰边向湄公河边走去。山城的清晨，烟雾缭绕，空气湿漉漉的，感觉要下雨的样子，不像永珍那么炎热。租了辆单车，不用地图，做好了当路痴的打算。一碗汤粉，一杯冰咖啡，简单的早点之后，骑车出发了。整个琅勃拉邦古城并不大，也没有高大的建筑，基本都是两三层，且木质别墅居多，感觉像是欧洲小镇，高大的往往都是庙宇和佛塔，佛教元素和法式风情和谐共生，让人有点穿越的感觉。骑行了大半天，穿行在热带树木簇拥下并不

宽阔的马路上，时不时意外的发现这条路在电影里出现过，那栋房子主人公曾进去过等有意思的事情。偶尔遇到感兴趣的寺庙，就进去转转，遇到好看的房子，就停下来拍照，累了渴了就在路边买一杯鲜榨的冰凉可口的柠檬汁，十分惬意。

老挝是个佛教国家，琅勃拉邦作为至今保存最古老的一座城市，曾是澜沧国、澜沧王国、琅勃拉邦澜沧王国国都。她是老挝佛教中心，寺庙、佛塔林立，仅市区内就有30多座寺庙，居民笃信佛教，是名副其实的佛都。寺庙是金色的，街头飘荡的橙黄色则是僧侣们的僧衣。而琅勃拉邦，旧名“香通”意为金城，从名字可见这座小城昔日的繁盛，金色的琅勃拉邦，她才是这个国度灵魂的所在。1995年12月，琅勃拉邦被联合国教科文组织列入世界历史遗产名录。民风纯朴，自然生态保护完好，没有过分商业化的人际关系，曾一度是法国的殖民地，被公认为东南亚传统与殖民风格保存最为完好的城市。来老挝，没人愿意错过这个小城。

我一天进出不下十座寺庙，走到哪里都能和佛塔、佛像偶遇，在这里迷路也是件让人收获惊喜和幸福的事情。寺庙里都是静静的，僧侣们有的在扫院落，有的做手工，有的在做功课，没有烟雾缭绕且呛鼻的香火，更没有熙熙攘攘人群，不像国内寺庙商业气息那么浓，或者这也是小乘佛教主张“自度”和“修心”的精髓体现吧。

傍晚时分，最好的去处便是湄公河畔。10月初，雨季还未结束，从河面吹来缕缕的微风，便足以让像我这样旅途中的人们心旷神怡。河水并不像想象中那么清澈，雨季的湄公河水有些浑黄，时不时还夹杂着上游漂流下来的枯枝烂木，即便这样，她依旧千百年来不动声色的穿过琅勃拉邦古城，让这个仅有几万人的小城极富灵气。沿着河畔，参天古树下，客栈、餐厅和店铺一字铺开，当地人三五成堆的在乘凉、聊天、打球，悠闲地打发着时光。老板、店员、路边等待揽客的嘟嘟车司机都是悠然的，偶尔会向路过的游客招呼一句，即便得到“NO, thanks”，仍会回以坦然的微笑。跟国内旅游景区高度的商业化、喧嚣的叫卖声以及唯利是图的商业环境形成鲜明的对比。

像电影中的场景一样，我也租了一条小舢舨，游在湄公河上，感受这条发源于祖国西南大山里的河流的气息。河面比在岸上看到的要宽阔很多，两岸是茂密的热带参天大树，拍眼远眺就是远山和丘陵。运气好的，恰好遇到

两支龙舟队在河面上训练，队员们和着整齐的号子，做出统一的划桨动作，逆流而上。云雾环绕的远山、郁郁葱葱参差不齐的树木、静静流淌的河水，这一切都让这龙舟给激活了，充满了生机，整幅画面瞬间也有了灵气，让我心潮澎湃的不停按动相机快门，这也是我生平第一次这么近距离的看到赛龙舟。夕阳西下，晚霞红透了西天，河面上波光粼粼，反射在每个划龙舟的青年健美的肌肉上，仿佛这一刻，时光又静止了，美的让人忘记了呼吸。

当然你也可以在某一天的黄昏，早早的选择一家在河边看日落位置最好餐厅，或独自一人，或约三两朋友，点一杯老挝当地的咖啡或者冰镇啤酒，发呆，聊天，欣赏日落落在河面背后的远山，晚霞把河面映照的金光闪闪，这时恨不得眼睛都不要眨一下，唯恐错过了最美的一瞬间。

又是一个清晨，刚过六点，我就匆忙起床，疾奔香通寺，街上已是人头攒动。据说每天都有很多信众前来布施，大家早早的带着坐垫，褪去鞋袜，跪在路边，准备好布施的食物，静静的等待僧侣们的到来。当那些身着橙黄色僧衣的身影款款而来时，跪在路边的信徒便把准备好米饭、水果等食物依次放入僧人化缘的钵内，僧人们面部表情严肃，既不道谢，也没有半点局促不安，信徒们更是虔诚而谦卑。施者跪着，受者站着，在老挝这个佛教国家，似乎很平常，有尊严的受施，真诚的施予。后来，我在皇宫门口看到保护这种布施仪式的宣传单。

清晨的另一个去处，便是早市。感受当地人一天的开始，早市是绝佳的场所。就在香通寺旁边，它位于与湄公河和夜市之间的一条平行的小巷内，两边都是住家，只有每天早上，这里才会出现很多小摊小贩，卖菜、卖水果、卖早点、卖花，什么都有，特别有意思。早市上的人也多，除了当地百姓，还有一些像我一样背着相机的游客。和国内的菜市场相比，少了熙熙攘攘，大家都心平气和的，貌似也没有讨价还价，安静的，微笑着。

我走在悠闲的人群中，幻想着像影片中摄影师那样，在布施的人群中搜寻着正在布施的美丽小小；或是在早市中，不经意抬头，看见小小站在某个摊位，迎着晨光冲着我微笑。

早安，琅勃拉邦！

盐田港集团系统集装箱量九至十月再创新高

盐田港码头今年9月份集装箱吞吐量为113.59万标箱，比上年同期增长16.32%。其中，一、二期30.82万标箱，增长16.35%；三期及扩建78.23万标箱，增长16.33%；西港区4.54万标箱，增长16.11%。

截至2014年9月集团系统箱量完成情况 单位：万标箱

	本月数			累计数		
	2014年	2013年	同比增长	2014年	2013年	同比增长
盐田国际(一、二期)	30.82	26.49	16.35%	232.49	215.79	7.74%
盐田国际三期及扩建	78.23	67.25	16.33%	590.17	547.78	7.74%
西港区	4.54	3.91	16.11%	34.27	31.82	7.70%
大铲港区	11.44	8.84	29.41%	93.06	72.52	28.32%
合计	125.03	106.49	17.41%	949.99	867.91	9.46%

与同行业对比来看，今年9月我集团系统集装箱吞吐量同比增长17.41%，增幅略高于深圳总体水平（深圳港今年9月集装箱吞吐量同比增长9.38%）。今年9月集团系统集装箱吞吐量在深圳的市场份额为56.81%。

	本月数		累计数	
	9月	同比增长	1-9月	同比增长
深圳港	220.09	9.38	1,761.81	2.13
集团系统	125.03	17.41	949.99	9.46
其中：盐田港区	113.59	16.33	856.93	7.74
大铲港区	11.44	29.41	93.06	28.32
赤湾港区(含妈湾港)	41.57	-9.38	367.64	-9.48
蛇口港区	52.90	9.78	438.58	-1.52

盐田港码头今年10月份集装箱吞吐量为108.34万标箱，比上年同期增长7.99%。其中，一、二期29.39万标箱，增长8.01%；三期及扩建74.61万标箱，增长7.97%；西港区4.34万标箱，增长8.23%。

截至2014年10月集团系统箱量完成情况 单位：万标箱

	本月数			累计数		
	2014年	2013年	同比增长	2014年	2013年	同比增长
盐田国际(一、二期)	29.39	27.21	8.01%	261.88	243.00	7.77%
盐田国际三期及扩建	74.61	69.10	7.97%	664.78	616.88	7.76%
西港区	4.34	4.01	8.23%	38.61	35.83	7.76%
大铲港区	10.53	7.67	37.29%	103.59	80.18	29.20%
合计	118.87	107.99	10.08%	1068.86	975.89	9.53%

与同行业对比来看，今年10月我集团系统集装箱吞吐量同比增长10.08%，增幅略高于深圳总体水平（深圳港今年10月集装箱吞吐量同比增长4.99%）。今年10月集团系统集装箱吞吐量在深圳的市场份额为55.57%。

	本月数		累计数	
	10月	同比增长	1-10月	同比增长
深圳港	213.92	4.99	1975.78	2.43
集团系统	118.87	10.08	1068.86	9.53
其中：盐田港区	108.34	7.99	965.27	7.77
大铲港区	10.53	37.29	103.59	29.20
赤湾港区(含妈湾港)	39.79	-8.35	407.44	-9.37
蛇口港区	54.59	6.34	493.16	-0.71

(文/邹佩婷)

浙江大学·盐田港集团物流与供应链管理专题研修班圆满结束

为全面贯彻落实盐田港集团2014年干部员工培训计划，培养善于推动集团转型升级的管理人才和专业技术人才，提升全系统物流业务板块的总体水平，集团于2014年9月15日~21日组织举办物流与供应链管理专题研修班。陈德云副书记带队，来自集团各部室、二级单位的管理人员和业务骨干共90人参加了学习培训。

参训学员认真学习，积极思考，踊跃参与教学互动；在课堂讨论时，广泛交流，深入研讨；在外出参观学习时认真观摩，虚心请教，求知若渴。不少学员利用晚上时间认真自学，组织小组开展研讨交流活动，充分展现了盐田港人敬业求知、积极进取的精神风貌。

在结业典礼上，童亚明总裁结合自身留学期间的学习心得指出：“创新”的途径有两种，一个是致力于方法论的创新，另一个是干别人没有干过的事。结合盐田港集团的发展，首先是要做好现有港口业务经营创新，物流供应链要积极利用移动互联网，实现工具的创新应用；其次是要采取有效措施，加大内地港口的建设，着力推进集团各项投资项目。他勉励全体学员要以这次学习为契机，努力把培训成果不断延伸、应用到今后的工作中，积极探索业务发展思路，更好地服务集团二次创业的发展大局。

(文/王莹)

盐田港代表队参加盐田区第三届全民健身运动会篮球比赛

为贯彻落实全民健身精神，倡导健康生活方式，促进与盐田区内机关、企业之间的交流与沟通，展现盐田港人团结协作、意气风发的精神风貌，盐田港集团与盐田国际联合组队参加了盐田区第三届全民健身运动会篮球比赛。

本届运动会篮球项目由来自盐田区内的23个代表队组成，实力较往届更加强健，当中不乏教育系统代表队、海山街道代表队、盐田街道代表队等老牌劲旅。借助于去年在“盐田港·健康活力季”三人篮球赛上群雄逐鹿的身影，来自系统内的12名球员组建队伍参加了本次篮球盛会。从准备阶段训练的大汗淋漓，到小组赛步步为营，再到淘汰赛的全力以赴，参赛队伍在领队兼教练赵新的带领下一路过关斩将最终闯入八强，获得二等奖的好成绩。

(文/陈则瑞)

广东省副省长邓海光一行调研大铲湾港区

9月15日下午，广东省副省长邓海光率省政府水利厅、林业厅、海洋局、国家海洋局南海分局等部门相关领导调研大铲湾港区驳船码头和后方堆场项目用海情况。市政府副秘书长朱廷峰、市海洋局副局长梁俊乾、宝安区副区长张勇、大铲湾公司董事长周鹏等领导参加了调研活动。

在大铲湾码头一期前沿，周鹏董事长向邓海光副省长及随行领导介绍了大铲湾港区的规划和建设情况。随后，邓海光副省长在港区口岸大楼七楼会议室听取了大铲湾公司关于港区驳船码头、后方堆场项目用海情况的汇报和市海洋局关于市大空港及半岛区填海规划情况的汇报。

邓海光副省长结合调研情况表示支持深圳市具体项目建设过程中的岸线使用和区域用海需要。邓副省长指出，岸线使用和区域用海要进行慎重的考虑和研究，并与深圳的整体经济发展和经济规划相衔接，围填海重点倾斜于城市产业的发展；要严格按照国家相关条例和程序开展相关工作，做好海洋功能区划、区域用海规划和围填海计划，“三划”要衔接；在使用岸线和区域用海过程中，注意利用、整治、修复，重视生态保护；要依托深圳的技术优势，加强对用海区域生态、环境、海洋功能等方面的综合研究和评估，尤其是加强陆海统筹；河口、湾口、海洋功能等自净能力弱的海域要加强环境保护。

(文/大铲湾港建办)

资讯公司开展“核心骨干员工”评选活动

为了更好地调动员工的工作热情，树立典型、激发活力，打造一支骨干队伍，实现公司可持续发展，资讯公司成功开展了第一批“核心骨干员工”评选活动。从8月下旬开始，资讯公司员工积极参加，经员工自评、部门经理和分管总监评分等环节，计算出基础客观评分。9月10日上午，资讯公司员工进行投票评选，经总经理办公会对综合分数排序审议，确定资讯公司第一批“核心骨干员工”为：王新华、胡楚雄、李慧、周海峰。

9月12日上午，资讯公司召开第一批“核心骨干员工”表彰大会，对获选的四名“核心骨干员工”进行表彰。钟海总经理对获奖员工表示祝贺，寄语他们再接再厉努力工作，争取取得更好的成绩。钟总表示，“科学管理、以人为本”是公司的管理目标，要在公司内部营造尊重人才、尊重创新的良

好氛围，充分调动员工的工作热情和创造力，齐心协力谋求资讯公司的快速发展，在互联网迅猛发展、集团“二次创业”形势下，全力落实集团布局和加快发展信息产业，促进转型升级，构建智慧湾区。

(文/黄微微)

盐田综合保税区产业发展和空间布局规划研究第一次工作会议召开

10月11日上午，盐田综合保税区产业发展和空间布局规划研究项目第一次工作会议在深圳市市民中心西区3053会议室召开，会议由市经贸信息委副主任谢建民主持，市经贸信息委保税经济促进处、沙保中心、盐保中心及盐田港集团副总裁叶忠孝、规划发展部相关人员参加了会议。

会议正式宣布成立项目合作工作小组。为体现项目的重要性，谢建民副主任、叶忠孝副总裁亲自挂帅担任工作小组组长，成员由经贸信息委、沙保、盐保及盐田港集团规划发展部相关人员组成。作为副组长，集团规划发展部总经理梅雷鸣汇报了目前的工作进展及下一步工作计划，双方就工作计划时间达成一致。谢建民副主任和叶忠孝副总裁分别代表市经贸信息委和盐田港集团签署了《共同开展盐田综合保税区产业发展和空间布局规划研究合作备忘录》(以下简称《合作备忘录》)。

与市经贸信息委签署《合作备忘录》，标志着盐田区综合保税区建设与发展进入新的阶段，为盐田港参与盐田综合保税区开发建设与管理运营奠定了坚实基础。

(文/刘伟)

盐田港集团组团参展2014年物博会

10月14日上午，2014年中国(深圳)国际物流与交通运输博览会在深圳会展中心正式拉开帷幕。国家交通运输部副部长冯正霖、深圳市委书记王荣、市长许勤出席开馆仪式，盐田港集团总裁童亚明等领导参加了物博会。

物博会是目前我国唯一的国家级物流与交通运输综合博览会。本届物博会以“创新物流大平台，再造丝路新辉煌”为主题，按功能板块设立物流与供应链管理、国际、港航、航空、智能交通、客运交通与新能源、物流设备与技术、海铁联运、物流金融与相关产业、清洁能源、交通建设、绿色货运、电商物流及快递、物流人才等14大展区，展览内容覆盖物流与交通运输领域的各个环节和各类企业。

在集团的统一部署下，盐田港集团旗下盐田港物流、盐田港

资讯、大铲湾公司、能源物流等四家公司参展物博会，重点推介的世纪物流园、现代物流中心二期等项目，吸引了在场客商们的高度关注。物博会期间，盐田港展位获得“行业贡献奖”荣誉称号。

(文/陶旭瑾)

盐田港集团新企业会计准则培训班圆满结束

10月19日至21日，由集团公司和股份公司共同组织的《2014年会计准则变革、操作及影响》培训班在深圳市会计进修学院培训基地成功举办，此次培训也是2014年会计人员继续教育的重要内容。盐田港集团财务总监朱大华主持培训会，集团系统财务及审计人员共计100余人参加了培训。

本次培训聘请了财政部会计司冷冰博士以及北京国家会计学院教授、财政部科研所博士生导师陈敏教授作为主讲老师。本次培训达到了预期目的，取得了较好的效果。许多学员反映，这次培训内容丰富充实，切合实际工作需要，通过听取专题课程，专业知识有所深化，业务能力得到了提升。

(文/孙可佳)

厦门大学盐田港集团人力资源管理专题研修班圆满结业

10月25日，厦门大学盐田港集团人力资源管理专题研修班举行简了结业典礼，88名学员分批从集团党委副书记、纪委书记陈德云和厦门大学公共事务学院培训中心执行主任吴小坤手中接过了烫金结业证，从而为本次人力资源管理专题培训划上了圆满的句号。

厦门大学公共事务学院邀请国内人力资源管理专业的知名专家学者，从战略人力资源管理、薪酬管理、招聘管理、绩效管理、组织行为、和谐劳动关系构建、企业文化与员工向心力构建等几个方面向学员们系统传授了人力资源管理领域的新知识、新理论、新理念和新方法。

陈德云副书记在总结讲话时向全体学员提出了三点希望：一是要继续坚持专业学习，也要注意汲取和积累跨界知识；二是要坚持学用结合，加强实践锻炼；三是要把所学所思运用到具体的工作中，推动集团人力资源管理工作出成果、出成效。

(文/刘剑)

盐田港半山悦海项目开工

10月28日，盐田港半山悦海项目在梧桐山隧道北侧正式开工，标志着梧桐山隧道取消收费“一揽子”方案的全面落实。盐田区副区长乔恒利，特区建发集团、盐田港集团董事长李冰，盐田港集团党委副书记、纪委书记陈德云，大铲湾港口投资发展公司董事长周鹏，特区建发集团、盐田港集团财务总监朱大华，盐田港建港指挥部副总指挥李群等领导参加开工仪式并为项目培土奠基。开工仪式由特区建发集团、盐田港集团监事会主席朱新宏主持。

半山悦海项目是由盐田港集团全资子公司——深圳市盐田港置业有限公司开发建设的城市更新项目。项目用地面积2.13万平方米，总建筑面积17.19万平方米，由4栋超高层住宅和1栋高层保障房构成，周边自然景观资源突出，地理区位优势明显。预计2016年底主体封顶，2017年底竣工。

(文/吕薇)

力谋发展 资讯公司业务取得新突破

10月17日上午，盐田港集团信息化规划项目启动会在海港大厦一楼会议室召开，集团各部门、各单位信息化负责人以及外部顾问，参加了项目启动会。项目组介绍了项目目标、规划方法、总体规划等情况，集团信息规划有序开展。集团信息规划目的是充分理解和承接集团转型升级、二次发展战略，分析内外产业环境，梳理信息需求和现状，为集团信息化建设制订信息战略、信息总体蓝图、技术架构、发展方向、实施路径和治理策略。本次信息规划将围绕集团管理信息系统建设、智慧港口、信息产业发展三方面开展。

10月24日上午留仙洞项目部与资讯公司在大中华召开了留仙洞项目智能化系统设计咨询项目启动会，留仙洞项目部、资讯公司项目组以及外部顾问、深圳智慧城市专家参加了启动会。留仙洞项目部介绍了项目总体情况和对智能化的前期构想，项目组介绍了项目计划，各位专家对智慧园区建设进行了探讨。

(文/滕勇)

“盐田基层统计员之家”顺利揭牌

为建立深圳基层统计员与政府沟通的桥梁，11月11日下午，“盐田基层统计员之家”揭牌暨微信平台启动仪式在盐田区政府12楼东厅会议室举行。市统计局局长殷勇、盐田区常务副区长刘卫翔、区发改局局长莫照玲出席了会议，盐田港集团被授予“区重点统计成员单位”称号。

“盐田统计员之家”是“深圳统计员之家”的分部，建立“盐田统计员之家”将使盐田区从事统计工作的人员有一个互动平台开展活动、加强交流、沟通感情。为此，盐田区还筹建了“统计员之家”微信公众号和微信群，便于为盐田区企业提供服务，定期发布统计数据，开展线上线下交流，真正实现统计数据取之于企业用之于企业。

(文/邹佩婷)

集团系统青年员工参观惠州荃湾煤炭码头

为提升青年员工的主人翁意识，加强青年员工对集团对外拓展业务的了解，11月13日下午，盐田港集团团委组织集团系统内青年员工60人参观了惠州荃湾煤炭码头。

青年员工一行从大亚湾海洋城码头上船，沿途参观了正在建设中的大亚湾纯洲岛煤炭码头项目，并于三航局平海镇上岸，参观了沉箱预制场。大家听取了工程师们对码头建设概况、工程进度，尤其是沉箱制作及运输的讲解，表现出了极大的兴趣，并纷纷对沉箱工程表示惊叹。

本次团员活动不但激发了青年员工对码头知识了解的热情，也培养了青年员工对企业的热爱，加深了青年员工对企业的情感，达到了预期目标。

(文/谷欣)

