

行政院及所屬各機關出國報告

(出國類別：出席國際會議)

參加亞太地區航空貨運承攬協會 FAPAA 二〇〇一年年會會議報告書

服務機關：交通部民用航空局

出國人 職稱：科員

姓名：韓振華

出國地區：菲律賓馬尼拉

出國期間：九十年六月十七日至二十日

報告日期：九十年九月十日

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行政院及所屬各機關出國報告提要

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報告名稱：

參加亞太地區航空貨運承攬協會FAPAA二〇〇一年年會會議
報告書

主辦機關：

交通部民用航空局

聯絡人／電話：

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韓振華 交通部民用航空局 空運組 科員

出國類別： 其他

出國地區： 菲律賓

出國期間： 民國 90 年 06 月 17 日 -民國 90 年 06 月 20 日

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關鍵詞： 亞太地區航空貨運承攬協會（FAPAA），Cargo 2000，貨物清
帳服務系統（CASS），電子商務（E-Commerce）

內容摘要： 亞太地區航空貨運承攬協會（Federation of Asia-Pacific Aircargo Associations）係由亞太地區（或國家）之航空貨運承攬公會所組成之民間機構，其成員幾乎涵括亞太地區所有國家（地區），而由於目前亞太地區之航空貨運市場在全球航空貨運市場中，已佔有一相當重要之地位，且本次年會各會員除報告該國（地區）航空貨運承攬業界之最新發展情況外，亦針對目前航空貨運承攬業界面臨之重要課題進行專題討論（包括 Cargo 2000、CASS 及電子商務等），因此將可作為我國未來航空貨運產業發展之借鏡及重要參考依據。

本文電子檔已上傳至出國報告資訊網

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壹、前言

隨著全球經濟活動的成長與自由貿易的推展，加上不同國家與地區間生產技術的差異化與分工，使得國際間貨物運輸的需求量日益增加，貨物透過航空運輸方式更可提升時間、空間的效用與價值，亦使航空貨運運輸活動扮演了日益重要的角色，依據國際機場協會（Airport Council International, ACI）2000 年 8 月出版之「全球機場運量報告-1999 年」（World Airport Traffic Report-1999）的資料顯示，1999 年進出全球各機場之貨物總計為 6,660 萬公噸，較 1998 年成長 6.4%，成長幅度高於客運量 4.6% 之成長率，其中歐洲與北美地區穩定成長（分別成長 5.6%、4.5%），而亞太地區因經濟復甦，對航空貨運之需求十分強勁，成長率更高達 13.2%（詳如圖 1 所示）。

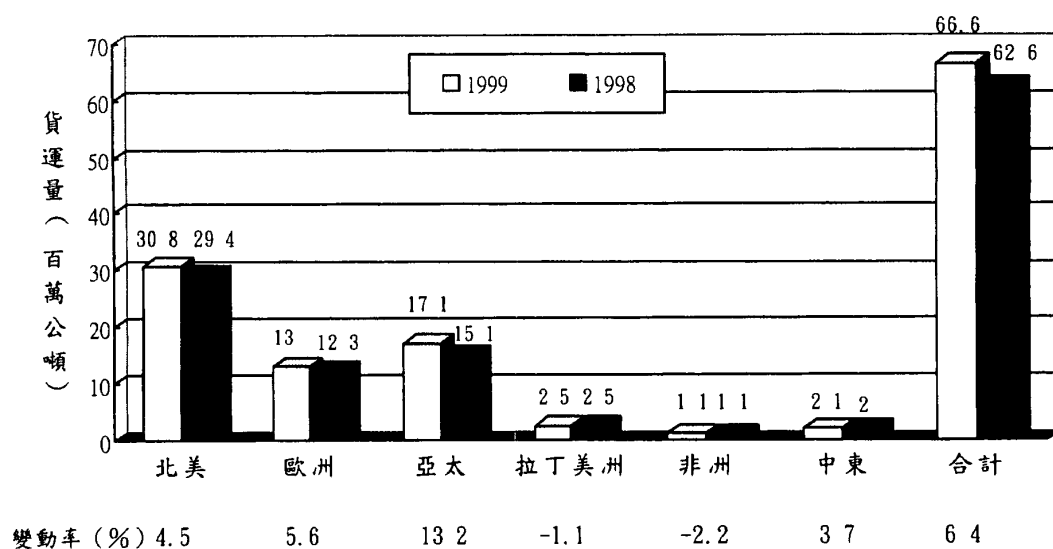


圖 1 全球國際機場航空貨運量

近年來我國航空貨物運輸市場亦不斷蓬勃發展，台灣地區整體航空貨運量（不含行李及郵件）雖然在 1990 年僅有 43 萬公噸，惟 2000 年時已達 129 萬公噸，10 年來貨量成長二倍，年平均成長率為 20%，其中中正國際機場的貨運量佔有率 90% 以上，為台灣地區處理航空貨運業務的主要機場，其貨運量表現與台灣整體航空貨運量變化息息相關，惟高雄機場之佔有率也逐年增加，顯示高雄機場重要性亦逐漸提升（詳如圖 2 所示）。

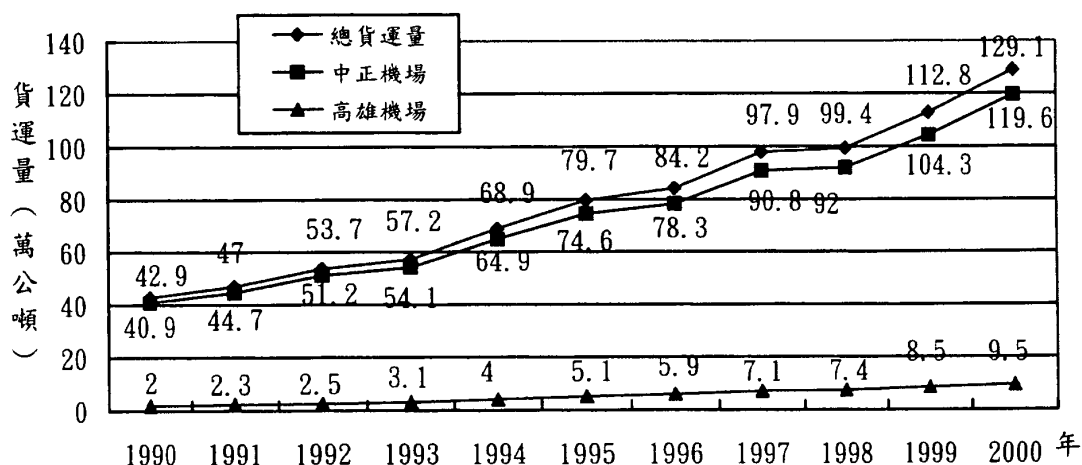


圖 2 台灣地區國際機場歷年航空貨運量成長圖

再從 1999 年全球各國國際機場進出貨物觀察（詳如表 1），全球貨物吞吐量最大的機場為曼菲斯（全年貨物吞吐量為 241 萬公噸），排名第一，香港赤臘角機場躍居第二（全年貨物吞吐量為 200 萬公噸），洛杉磯機場排名第三，至我國中正機場吞吐量則首次突破百萬公噸大關，約達 104.3 萬公噸，排名全球第 17，在航空貨運市場係佔有一席之地。

由上各項數據顯示，我國及亞太地區之航空貨運市場

在全球航空貨運市場中，係佔有一相當重要之地位，依據波音公司對航空貨運市場的預測，未來亞洲地區亦將成為全球航空貨運的主要市場。

表 1 1999 年全球進出貨物前 20 名之國際機場

排名	城市/機場	進出貨物(萬公噸)	成長率(%)	排名	城市/機場	進出貨物(萬公噸)	成長率(%)
1	美國曼菲斯	241.3	1.9	11	美國芝加哥奧黑爾	148.2	2.7
2	香港赤臘角	200.1	20.9	12	美國陸易斯維爾史丹佛	144.0	3.3
3	美國洛杉磯	196.9	5.6	13	英國倫敦希斯羅	135.5	4.2
4	日本東京成田	184.2	12.5	14	法國巴黎戴高樂	122.6	14.9
5	美國紐約甘乃迪	172.8	7.7	15	荷蘭阿姆斯特丹史基浦	122.5	0.5
6	美國安克拉治	165.8	28.6	16	美國紐約紐瓦克	109.4	0.9
7	韓國漢城金浦	165.5	16.2	17	中華民國台北中正	104.3	13.4
8	美國邁阿密	165.1	-7.9	18	美國印地安那波里斯	104.2	28.2
9	德國法蘭克福	153.9	5.0	19	美國戴頓	89.5	0.2
10	新加坡樟宜	152.3	16.7	20	美國亞特蘭大哈茨菲爾德	88.3	-2.7

在航空貨運相關產業中，航空貨運承攬業係扮演相當重要之關鍵性角色。亞太地區航空貨運承攬協會（Federation of Asia-Pacific Aircargo Associations）係由亞太地區（或國家）之航空貨運承攬公會所組成之民間機構，其主要成員包括澳洲、斯里蘭卡、香港、泰國、日本、韓國、印度、新加坡、菲律賓、馬來西亞、印尼、孟加拉、澳門、尼泊爾、汶萊、越南、紐西蘭及我國，成員幾乎涵括亞太地區所有國家（地區）。台北市航空貨運承攬商業同業公會早在 1986 年起即加入該聯合會並成為正式之會員，由於目前中共尚未加入此一組織，因此大會並不排斥我國於會場上懸掛國旗，對於目前外交仍陷困境之我國，更具其意義。

此次亞太地區航空貨運承攬協會二〇〇一年年會除

討論每年例行性之事務外，尚有國際空運協會（IATA）提出 Cargo 2000、CASS 等數項空運貨物發展方向的介紹與專題報告，將可作為我國未來發展航空貨運產業之重要參考依據。

貳、會議概要

- 一、會議名稱：亞太地區航空貨運承攬協會二〇〇一年年會
- 二、會議日期：二〇〇一年六月十七至十九日
- 三、主辦單位：菲律賓航空貨運承攬業聯盟（Aircargo Forwarders of the Philippines, Inc.，AFPI）
- 四、舉行地點：菲律賓馬尼拉 Heritage 飯店
- 五、我國民間出席代表：

（一）台北市航空貨運承攬商業同業公會蕭理事長禹新

（二）台北市航空貨運承攬商業同業公會馬名譽理事長維強

（三）台北市航空貨運承攬商業同業公會鮑執行長學超

（四）台北市報關商業同業公會魏理事長慶利

參、會議議程

日期/時間	會議主題	內容摘要
6/17 1830-2030	會員報到暨雞尾酒會	1. 介紹各國與會代表。 2. 菲律賓民航委員會執行長致詞。
6/18 0845-0915	FAPPA 第 28 屆執行委員會會議(Executive Council Meeting, ECM)開幕典禮	1. 歡迎會議委員暨分發會議綱要。 2. 接待國承攬公會主席致歡迎詞。

		3. FAPAA 主席開幕致詞。 4. 菲律賓經濟特區管理局主席致詞。
0915-0930	與會代表合影	-
0930-1230	1. 確認出席代表 2. 回顧前次會議紀錄 3. 其他提案 4. 各委員會報告 5. 外部事務 6. 電子商務報告	1. 由香港貨運業協會 (HAFFA) 主席報告 2000 年 9 月在荷蘭鹿特丹參加國際貨運協會 (FIATA) 會議之情形。 2. 由 IATA 代表作專題報告 -Cargo 2000 -CASS 3. 由台北市航空貨運承攬商業同業公會代表作專題報告 -電子商務
1230-1330	午餐	-
1330-1500	內部事務	1. 討論 FAPAA 與 FIATA 二協會間之關係。 2. 其他議題。
1500-1520	下午茶	-
1520-1700	1. 各委員會報告 (1) 研究與發展 (2) 教育與訓練 (3) 會員 (4) 廣告與傳播 2. 臨時動議	各國報告 (1) 澳洲 (2) 泰國 (3) 菲律賓 (4) 香港 (5) 台灣 (6) 其他
6/19 0900-1115	專題討論	CASS 專題討論
1115-1250	1. 各國報告 2. 一般常務	1. 資訊與意見交流。 2. 頒發出席證書。
1250-1300	決定下次開會時間及地點	決定第 29 屆會議地點。
1300	ECM 閉幕	-
1300-1400	午餐	-

1400-1530	FAPPA 年度一般性會議 (Annual General Meeting, AGM)	1. FAPAA 主席選舉 2. FAPAA 年度收支報告
1530-1630	記者招待會	-

肆、會議內容

一、專題報告

(一) CARGO 2000

IATA 於 1990 年初期即已鑑於其會員因貨運業務之發展時有瓶頸困難，加之快遞公司業務之快速興起，故為此特聯合了航空公司、承攬業者及運輸業等會員，在 1997 年初於 IATA 下成立了 Cargo 2000 組織，其目的在研擬一個適當的策略，來整合各個航空貨運作業系統，以達一個共通的作業標準，並針對需改進的項目及範圍、功能及方法、進度及測試等之準則，做了初步的規範。其後不到半年的時間，已將近有控制全球 60-70 % 貨運量的業者參加。

Cargo 2000 所規劃之工作重點如下：

1. 電子資訊交換 (Electronic Data Interchange, EDI) 系統之建立

Cargo 2000 統合規劃作業中，最重要的步驟就是各航空公司、承攬、倉儲及運輸業者間的資訊交換，亦即以事先約定好的格式，由各業者的電腦系統互相自動傳送以接收相關資訊，並各自有能力繼

續處理後續作業，並再自動傳送或接收處理過的或更新過的資訊。這裡面主要包括的功能，對倉儲、承攬業及運輸業者的就是提單申報、貨況查詢、訂位等；對貨運站而言就是交貨、進倉打盤等。這些動作除了必要的連線作業外，也可藉由國際網路、電腦語音、商業電報或自動傳真來進行。

電子資訊交換系統的設立，基本上可以使長途運送的貨物隨時進行校對或查核其所在的位置及管理的情況，所以可以設定自動查詢及每小時通報之功能，直接提供正確的貨物資訊給業主或顧客。如有必要，甚或於貨運作業的途中，遇天候不佳或突發狀況等，更改運送程序以至於提前或延緩到達目的地，以確保貨件的安全。

2.條碼式標籤（Bar-coded Label，BCL）之引進

廣泛在物流業及倉儲業使用的條碼識別功能，在 Cargo 2000 作業中被鄭重的研究使用，並廣泛的推廣。比提單更進一步的條碼式標籤，可追蹤到每單一貨件，並加以管理及處理，在未使用條碼情形下，單件的貨物通常需併成併裝貨（由多張分提單組成），才能進入貨運處理程序以降低貨運成本。在顧客要求快速貨運的原則下，由於條碼控制的貨件，不論數量多少，仍然可以快速地進入貨運處理程序，並及時地運送至目的地，費用並不至於太貴且仍較快遞費用為低。

條碼式標籤的運用，在航空公司及貨運站均為條碼識別與掃瞄之技術、設備及作業系統的建立，以及掃瞄識別後電子資訊正確的處理；在承攬業及運輸業者則為統一運用航空公司及貨運站條碼在貨件貼上動作，並將貨件條碼輸入連線的電子資訊交換（EDI）系統中。Cargo 2000 的目標，計畫使參加的各成員完成其所在地中心市場及全球貨源的推廣和使用，並計畫逐步推廣至全球其他非 Cargo 2000 組織成員的航空公司、航空站、承攬業者及運輸業者來使用。

3.主要作業計畫（Master Operation Plan，MOP）之規劃

主要作業計畫係依前二項電子資訊交換 EDI 系統及條碼式標籤 BCL 設計完成後之整合計畫，再選由參加 Cargo 2000 組織中 9 家航空公司及 6 家承攬業者參加聯合作業測試，成效包括下面幾個重點：

- (1)由顧客收貨至送達對方顧客的時間，由以前的平均 151.2 小時（6.3 天）縮短為 64.6 小時（2.7 天）。
- (2)962 次測試中，完成 935 次，達成率 98%。
- (3)達成單件處理，但非全機械化操作。
- (4)需投入大量注意力，即需電腦化。

(5)所有處理過程均需重新設計、訓練。

(6)大量減少庫存及前置作業時間，瓶頸減少。

由上列之重點，貨運業務朝快速、快遞型之發展已不再是發展瓶頸，且極符合顧客滿意度的調查結果，對 Cargo 2000 組織的成員而言，最大的啟示莫過於可在現行的作業體制下，逐漸修正融入全新的作業體系，同時還可依本身財務及貨運量承載能力逐步修正需要的程度，避免初期一次的大量資金成本及人力轉換來後獲得需要的結果。現今 Cargo 2000 組織依據上述成果，繼續努力實施技術設備層面及系統運用層面的發展。

4.Cargo 2000 的實質規劃

Cargo 2000 組織的成效，不僅詳細分析了航空貨運的作業瓶頸，同時也完成了主要作業計畫 MOP。其中最關鍵技術的應用就是行動數據處理（Mobil Data Computing，MDC），也就是一般貨運站中推行無紙化作業的遠程目標：“數據資料的讀取及校對作業”。這不僅影響到處理作業的速度，甚而建築設備硬體的改善、現代化機械化設施的配置，都直接與 MDC 功能發生關連，也就是整體規劃作業必須以此做為基礎及規劃應用。

所謂行動數據處理 MDC 的第一步；資料讀取，不管是在貨運站內外，或在飛機艙中，或在貨車上，

或在承攬業者的倉庫，都必須隨時運用，讀取與校對的功能隨時交互運作資料讀取通常藉由掃描器讀取貼於貨件上之條碼 BCL，再由掃描器上附裝之無線發報器傳送至工作電腦上，工作電腦再與連線之主機資料進行電子資訊交換，再將指令傳回工作電腦旁之工作人員或使用掃描器之工作人員。這種雙向將貨物處理現場程序之讀取、確認及校對、放行之功能，直接與辦公室主要作業計畫 MOP 系統與管理人員相連，不管是航空公司、貨運站、承攬業或運輸業者都可藉此即時掌握作業情況，也只有如此才能每小時作自動校正、通報，進行 24 小時全功能作業，達成作業流程控制及顧客滿意之服務。

綜上，Cargo 2000 組織積極發展研究的結果，不僅符合 IATA 一貫作業服務精神，預計在不久之將來，其應用之電子資訊交換 EDI 系統、條碼式 BCL、主要作業計畫 MOP 及行動數據 MDC 等功能將被業界廣泛應用，其不僅為國際航空貨運解決了一般基本貨運基礎要領，同時更對發展航空貨運快速遞型業務提供了正面且積極之回應。

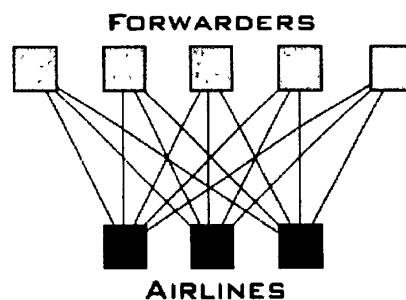
（二）貨物清帳服務系統（CASS）

IATA 發展貨物清帳服務系統（Cargo Accounts Settlement System，CASS）主要目的係為簡化航空公司與相關貨運代理業者間之貨物銷售及清帳的報告，CASS 已經成功的在全世界 30 個以上的國家應用，其中

包括 7000 家貨運代理業者，並已處理 1300 萬筆文件及 12 億元之清帳金額。

1.傳統清帳方式

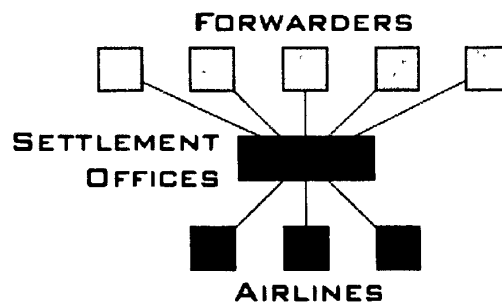
出口的航空貨物通常透過貨運代理業者向航空公司訂艙位，故須由貨運代理業者向貨主收受運費後，再支付給航空公司。有些航空公司要求貨運代理業者須製作銷售報告，而有些航空公司則需開立發票給其代理業者。然由於貨運代理業者可能替許多航空公司代理銷售艙位，而航空公司亦可能接受許多貨運代理業者的訂位，因此每一家航空公司將分別收受每一家貨運代理業者之銷售報告或分別開立一張售貨發票給每一家貨運代理業者。這種售貨發票及銷售報告必須被重複的檢查，且其金額須各別的支付，這種情況對於航空公司及貨運代理業者皆造成相當大的行政作業負擔。其作業方式可表示如下：



2.CASS 基本運作方式

航空公司提送空運提單的影本或電子檔給清帳中心，清帳中心透過這些資料將產生標準之售貨發

票，每一個貨運代理業者將收到與每一家往來航空公司之售貨發票，每一家航空公司亦將收到相對的會計資訊。貨運代理業者及航空公司在匯款日期的二週前皆有適當機會質疑發票上任何一筆不清楚的登載，在匯款日時，貨運代理業者僅需將所有應付金額一次匯入清帳中心之帳戶，接著清帳中心便會依據每一家航空公司應收之金額，再分別匯入每一家航空公司，其作業方式可表示如下：



3.CASS 優點

採用貨物清帳服務系統（CASS）將可顯著的降低昂貴且耗時的辦公室功能，該系統提供航空公司及其貨運代理業者數個優點：

- (1)適合今日技術經濟規模之運用。
- (2)電子資料處理（EDP）程序及型式的標準化。
- (3)透過清帳中心可產生該產業的標準售貨發票。
- (4)匯款的簡化：貨運代理業者可一次支付所有應付款項予所有相關的航空公司，航空公司亦可從所有相關的貨運代理業者中一次收到所有應收

款項。

(5)藉由使用標準的規則，可公正的處理違法的匯款行為而不會有差別待遇。

(6)可消除重複登載的資料：貨運代理業者及航空公司可透過各自的 EDP 系統，來遞送及收受售貨與標準發票資訊。

(7)透過清帳中心可將錯誤集中處理。

(8)可提升財務的控制及金流的改善。

(9)可提供可信賴與即時更新的統計資料。

(10)將由 IATA 的 CASS 經理提供指導。

(11)可提供貨運代理業者及航空公司相關的訓練。

(12)IATA 的貨運代理業者會員參加任何 CASS 的計畫無需支付額外的費用。

(三) 電子商務 (E-Commerce)

一般企業在轉型進入網際網路初期時面臨的最大障礙是缺乏效率，特別是以傳統方式經營之航空貨運承攬市場，該產業太多作業是以人工的方式來處理。大部份航空貨運運籌消費者與業者以往之認知皆認為電子商務就是去設立一個電子網站，讓別人知道他們在做生意，達到宣傳廣告之效益既定政策就達到目的。其實，

這種觀念並不十分正確，將機構內部流程整個導入電子化，跟供應商(垂直水平整合貿易伙伴)及客戶做電子化資訊的交換，也是一種電子商務的型式，也就是一般所說的 Business To Business (B to B) 電子商務，只是因為這一部份要投入大量的人力及資金，許多承攬業者不願輕易嘗試與配合。一般企業導入系統之初，不論內部員工與客戶做電子化資訊的交換方式，配合意願低落，致經濟效益未達邊際成本，其實現代化企業與傳統產業不同思考的是，如何善用資訊科技，從內部的流通管理讓工作變得更有效率，才能在網際網路的時代發揮競爭力。

航空貨運承攬業者要成功導入電子商務，首先是取得員工共識，以降低工時為目標，當達成邊際成本使員工享有工作品質與人生，電子商務與自動化是企業的有效辦法，現在的員工追求的是企業的企圖心與誠意，當承攬業者導入轉型期，必須有人力來建置有效的硬體設備，並應使員工逐漸瞭解經理人之決心。電子商務首先必須重新市場定位，並且確認未來的競爭策略與目標；其次，則是配合企業營運目標，建置相關系統，最重要的是，這個系統必須能夠快速整合企業內外部資源；接下來則進入營運階段，實際測試系統的運作情況，瞭解顧客的反應即時做必要修正；最後則是資料回饋，蒐集顧客資料做為未來的服務重點，創造一對一的個人服務。

當航空貨運承攬業者導入電子商務時，第一個是提供供應商(垂直水平整合貿易伙伴)及客戶財務的部份，導入訂單、貨物運籌追蹤自動化系統 (sales & tracing/tracking automation)，透過網路讓業務訂單處理的流程縮短，提高正確率，客戶服務業務人員在接受客戶查詢時更有效率，並且和財務系統連結，大幅降低管理與客戶服務的成本；接著是將業務系統中的客戶資訊和行銷部門的活動相結合，以為傳播運籌時之資料庫，以真正產生商機，而當整個系統都串聯在一起時，將可有效提升效率，掌握速度。建置完成之時，管理階層和員工只要利用 Internet 就可以溝通，使得整個工作模式及內容都非常有效率。

然而在導入電子商務之前必須先完成企業內部之資訊化，因為在接下來的這個時代中，速度決定一切會是不變的真理，如想要保持領先地位就必須：

- 1.在 Internet 的平台上做企業內部資源規劃。無論是在市場探源、產品研發、全方位內部控管、財務金流、運籌物流以及經營模式等，速度將成等比級數加快，許多傳統產業的內部管理還停留在以前的主從事架構或是中央集權式架構，將絕對跟不上時代。
- 2.要將分散在各個部門的資料庫數位化並做一個集中的整合及管理，也就是現在許多公司在做的資料倉儲 (data warehousing)，航空貨運代理業者因為

須提供關務運籌服務，依法必須儲存進出口通關資料，在電子簽章尚未完成法制化前，通關資料必須以原始資料存儲，雙重資料存儲成本必然增加，故仍有待電子簽章法制化後改善之。

3.做好客戶關係管理，建立維持客戶滿意度的機制。

現在流行「客戶導向市場」(customer oriented market)，這有賴於內部有效的資源管理及整合完備的資訊平台，來成功區隔客戶，做有效的促銷。

除了系統建置外，未來的致勝關鍵在於服務品質標準化。以目前眾多運籌服務網站為例，一則其資訊未即時化，提供錯誤之資料必造成客戶的信賴感低落，不再嘗試。尤其當你輸入關鍵字查詢時，通常會跑出很多筆不相關的資訊，客戶真正需要的可能只有一則，沒有做到真正的顧客後勤服務。故電子商務要成功，重要的是能夠改善提供顧客的服務品質，因此網路經營要站在消費者的立場來思考，才能真正創造出最符合客戶需求的網站。例如，當你想要供應鏈服務時，只要輸入密碼、產品、時間、預算、市場、地點，電腦自動幫你挑選出最適合的三個運籌服務產品，讓你能夠從中做選擇，省去顧客自己查詢的許多時間。但此種運籌服務尚未在市場中誕生，未來應以此理想為目標而努力以赴。

二、各國報告

(一) 澳洲國際承攬業聯盟 (Australian Federation of

International Forwarders Ltd.)

1. 下面二個因素將影響澳洲航空貨運承攬業者之發展：

(1) 貨物管理方式再造 (Cargo Management Re-Engineering, CMR)

澳洲海關部門於去年底向國會提出議案，以實施其貨物管理再造計畫。該計畫將引進較嚴格的懲罰制度，海關未來無須再去證明業者是否有犯罪之意圖，只要發現違反規定，即可向開立交通罰單一樣處罰相關業者，未來澳洲承攬業者對於不正確及延遲之貨物報告皆將面臨處罰。

這個法案若通過，則所有貨物資料皆須透過資訊系統向澳洲海關申報，其中空運貨物必須在航機抵達 2 小時前申報，海運貨物必須在船抵達 24 小時前申報。這種制度將允許海關採取適當地風險管理措施，以降低違禁物品輸入澳洲。

(2) 口蹄疫 (Foot and Mouth Disease)

為了防止口蹄疫傳染至澳洲，澳洲政府投入五億元經費加強管制措施，其中海關及檢疫單位對於空運、海運貨櫃及旅客行李將施予全面檢測，此外，對於危險性較低之快遞貨物亦將加強檢測。然而，此舉將可能造成貨物延遲及對業者收取額外之費用，目前貨運產業界正與政府部門

協商以決定衡量收取費用之最佳方式。

2.教育與訓練：

目前澳洲國際承攬聯盟所舉行的教育訓練包括：空運危險物品之初訓及複訓、海運危險物品、公路危險物品、國際航空貨物基本進/出口程序、海運貨物基本進/出口程序、航空安全規則、裝載配置及限制、易腐敗航空貨物之處理及索賠程序等課程。

(二)泰國航空貨運承攬公會(Thai Airfreight Forwarders Association, TAFA)

1.會員：

目前泰國航空貨運承攬公會中共有 110 家會員，在 2000 年時共新增 7 個會員。

2.教育及訓練：

泰國航空貨運承攬公會自 2000 年 1 月至 2001 年 4 月底前請日本航空及國泰航空支援相關師資，對所屬會員開設包括基本貨運費率計算及危險物品處理等訓練課程，完訓人數共達 257 人次。

3.未償還債務之保險計畫(Default Insurance Program, DIP)：

DIP 計畫將由泰國航空貨運承攬公會與主要航

航空公司簽訂，其著眼於航空貨運承攬業者之財力有限，故如泰國航空貨運承攬公會之會員發生未償還之債務時，則此計畫將對航空公司提供這些業者未來將歸還之財務保證。因此，此計畫可減輕大部分航空貨運承攬業者向銀行取得保證之財務困難，並可增加業者現金流動。

DIP 計畫將於 2001 年 10 月施行，現階段已有數個航空公司及航空貨運承攬業者加入，未來將逐步擴展至所有業者。

4.CASS 計畫

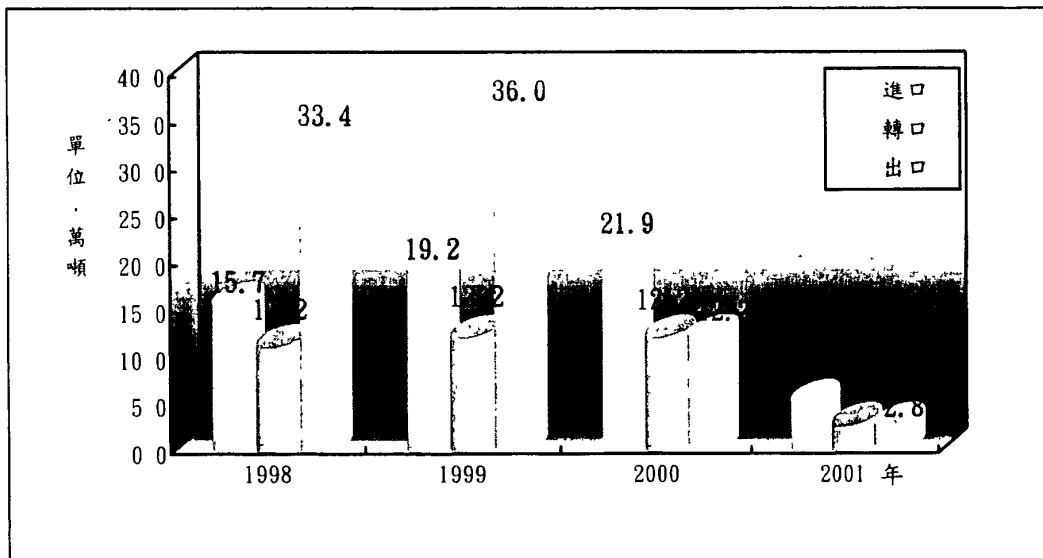
CASS 計畫預計 2001 年 11 月執行，但數個航空公司因對於是否所有航空公司皆加入該計畫之問題尚有疑義，故迄今仍未決定是否加入。

5.運輸法案

新的運輸法案將公布，包括 M.T.O 法案及航空運輸法；另原預計 2004 年啟用的新曼谷機場（Suwannabhum Airport）的計畫，因規劃方式改變及經費不足等因素將可能延後啟用。

6.貨量統計

曼谷機場 1998 至 2001 年進、出、轉口航空貨運量統計資料詳如圖三所示。



註：2001 年資料僅包含 1-3 月。

圖 3 曼谷機場航空貨運量

(三) 菲律賓航空貨運承攬業聯盟 (Aircargo Forwarders of the Philippines, Inc., AFPI)

菲律賓航空貨運承攬業聯盟為了使其會員公司之員工能接受一持續性的教育訓練，以提升各會員公司之專業評價，因此於 1998 年時成立一訓練及發展中心，該中心成立之目標為：

1. 對於該會會員提供持續性的訓練及教育計畫；
2. 從事專案研究，並將研究結果提供會員參考。

目前該中心所舉行的訓練課程包括：航空貨運承攬基礎班、航空貨運承攬費率進階班、空運危險物品初訓班、管理人員訓練班、有效率之商業溝通班、顧客關係

課程、銷售人員訓練班、個人特質發展、對於非會計人員之會計訓練、對於非報關人員之報關訓練。

(四) 香港貨運業協會有限公司 (HongKong Association of Freight Forwarding Agents Ltd., HAFFA)

- 1.香港機場 2000 年處理之航空貨量共計 230 萬噸，比 1999 年成長 16%；另香港 2000 年海運貨櫃吞吐量為 1780 萬 TEU，比 1999 年增加 10%，使得香港海運貨櫃吞吐量高居世界第一。
- 2.香港在全球運籌發展中係定位為亞洲轉運中心，故承攬協會督促香港政府應儘速與中共當局一同改善跨越二地間之交通，並應採取更積極的行動藉由透過降低機場內航空貨運站之費率以協助降低貨運代理業者之營運成本。
- 3.承攬協會與海關、機場、貨運站等單位協商，如其會員可以在航機起飛前四小時，將貨物資料提供予航空公司，則將可幫助減少海關實際之查驗，並將可有效減少貨物在貨運站因拆開檢查而需重新卸下、包裝之動作，而為了感謝貨運代理業者之配合，因此兩貨運站之營運者皆同意將提出之重新拆裝費率提案暫時擱置。
- 4.在過去幾年，由於相關費率之降低使得香港仍具有競爭力，然而隨著中共即將加入 WTO，中共當局之相關管制措施將逐漸解除，在深圳、廣州、上海

等提供更低成本服務之港口與機場之環伺下，未來香港不能僅再依賴價格競爭之策略，香港貨運承攬業者必須警覺到未來在供應鍊（Supply Chain）上必須去提供更有效率之服務，並且須具有電腦、網路等高科技之設備與能力，方能提供更高附加價值之服務。

5.目前香港貨運業協會有限公司中共有 274 家會員，在 2000-2001 年間共新增 18 家會員。

6.香港貨運業協會有限公司在 2000-2001 年間請國泰等航空支援相關師資，對所屬會員開設包括基本貨運訓練及危險物品初、複訓等課程，完訓人數共達 208 人次。

（五）台北市航空貨運承攬商業同業公會（The Airfreight Forwarder's Association of R.O.C，TAFAR）

1.台灣整體經濟環境

2001 年上半年我國對主要地區出口均呈現衰退，其中以對美國出口降幅最大；另我國自主要地區之進口亦均大幅減少，其中自日本、韓國進口減退幅度超過二成。由於我對外貿易明顯減退，出、進口值按美元計算分別較上年同期減少 10.8%及 17.0%，其中進口減幅較出口大，貿易出超擴大為 65.5 億美元，較上年同期擴增近 1.5 倍，如按新台幣計算，扣除進出口物價因素後，2001 年上半年出、

進口值分別較上年同期實質減少 6.0%及 12.0%。

2001 年上半年我國國內資金雖仍呈寬鬆局面，然而受銀行放款與投資成長減緩，以及股市表現欠佳等影響，貨幣供給 M2 及 M1B 日平均年增率分別降為 5.8%及負 4.3%。另新台幣匯率續呈貶值走勢，新台幣兌美元平均匯率為 1:33.48。股市方面，2001 年第 1 季股市曾扭轉去年底低迷景象而呈現價量齊揚，惟第 2 季表現又轉差。上半年股價平均指數降為 5,449 點，總成交值減為 9 兆 7,998 億元。

受國際景氣趨緩，國內產業結構調整、房地產市場泡沫化、金融機構體質不健全、政情紛擾等循環性、結構性及制度性問題之影響，國內景氣自 2000 年第 4 季起明顯減緩，2001 年上半年國內總體經濟指標表現普遍欠佳，經濟成長率明顯下降，失業率持續攀升，對外貿易、工業生產呈現負成長；景氣燈號連續出現代表衰退的藍燈，顯示國內景氣低迷。

為刺激景氣，今年以來除中央銀行七度調降利率，政府積極推動「政府部門創造就業機會方案」、「國內旅遊發展方案」，落實「擴大公共投資提振景氣方案」、「全國經濟發展會議結論具體行動方案」，以及推動「政府部門專人專責吸引投資計畫」及「全球出口拓銷方案」等，以促進出口、民間投資及消費，創造國人就業機會外，政府也繼續推動

「知識經濟發展方案」、「全球運籌發展計畫」及「新世紀國家建設四年計畫」等中、長期措施，並將召開經濟發展諮詢委員會議，藉由凝聚各界共識，共謀經濟發展具體可行對策，以提升國家競爭力，促進經濟穩定成長。

2.台灣航空貨運市場

台灣地區 2000 年航空貨運總量為 1,291,425,128 公斤，較 1999 年 1,129,703,057 公斤成長 14.32%。其中進口貨量為 492,395,588 公斤較 1999 年 415,155,488 公斤成長 18.61%；出口貨量為 648,920,782 公斤較 1999 年 606,318,686 公斤成長 7.03%；進口快遞貨量為 22,854,263 公斤較 1999 年 10,726,887 公斤成長 113.06%；出口快遞貨量為 12,654,159 公斤較 1999 年 14,668,642 公斤衰退 13.73%，其衰退之主要原因係海關之相關規定未能符合市場需求（詳如表 2 所示）。

表 2 2000 年台灣地區航空貨量統計表

單位：公斤

集散站	進口	出口	轉口	快遞專區 (進口)	快遞專區 (出口)	專差快遞	總計
華儲	307,852,591	238,805,980	86,384,916	15,052,459	12,593,107	5,897,144	666,556,197
永儲	61,115,065	184,841,152	-	-	-	-	245,956,217
遠翔	84,726,730	169,013,528	-	-	-	-	253,740,258
FedEx	-	-	-	5,151,920	-	10,714,088	15,866,008
UPS	-	-	2,878,150	2,649,884	-	8,487,120	14,015,154
華儲高雄	38,701,202	56,260,122	268,918	-	61,052	-	95,291,294
2000 年 貨量	492,395,588	648,920,782	89,531,984	22,854,263	12,654,159	25,068,352	1,291,425,128
1999 年 貨量	415,155,488	606,318,686	78,549,713	10,726,887	14,668,642	4,283,641	1,129,703,057
成長率(%)	18.61	7.03	13.98	113.06	-13.73	485.21	14.32

伍、心得與建議

一、心得

(一) 亞太地區航空貨運承攬協會雖僅限於亞太各地區之承攬公會參加，然由於亞太地區之航空貨運市場在全球航空貨運市場中，已佔有一相當重要之地位，且該貨運承攬協會之年會中所討論之相關議題，亦係為目前各國航空貨運承攬業界之最新發展情況及面臨之重要課題，因此可作為我國未來發展航空貨運產業之借鏡及重要參考依據。

(二) IATA Cargo 2000 之主要目標係透過制度的建立、程序的標準化、貨物處理條碼化及資料傳送電子化等作業，使得整個貨物運送的流程均受到嚴密的監控，目前加入 Cargo 2000 已為世界各大航空貨運業之潮流，而我國籍中華航空公司亦已加入該組織，因此為提升我國航空貨運產業的效率及滿足顧客的服務，並使顧客得以掌握貨物資訊及降低貨物運送之成本，儘速加入 Cargo 2000 應為我航空貨運相關業者努力之目標。

(三) 面對資訊科技日新月異以及貿易自由化的衝擊，台灣的產業發展必然要走向知識經濟的時代，傳統航空貨運承攬等產業也必然需要轉型升級。當前經濟環境隨著全球化資訊數位時代的發展，電子商務對各產業競爭力之提升亦日益重要，為因應外來競爭，空運相關

業者應儘速發展電子商務以強化營運體質及幫助企業轉型，如：利用現有關貿網路連結報關承攬、航空公司、倉儲業界、金融保險與海關等次級系統的傳輸功能，將商流、物流、金流及資訊流結合，以加速貨物流通、減少存倉天數、降低作業成本、以有效運用人力與提升服務品質，並促進航空貨運市場高附加價值產業發展，進而逐步強化與跨國企業聯盟同步競爭的優勢條件。

(四) 目前台灣資訊業產值是全球第三，僅次於美國和日本，半導體產值是全球第四，排在美國、日本及韓國之後，依據天下雜誌之統計，在一千大製造業前一百名中，資訊電子業佔了 47 家，而台灣航空貨運市場百分之八十一為高科技與其相關產品，故為能精確化、有效化、效率化保有市場多數企業，因此各貨運相關業者必須應其貿易伙伴之要求而建置網際網路，以使網路價值鏈、供應鏈得以整合。

(五) 發展台灣成為全球運籌管理據點是政府當前重要工作之一，邁入二十一世紀，企業已不能自居於台灣，為適應全球化態勢，如何提昇企業競爭優勢，亟待業者與政府共同努力。為協助企業以台灣作為全球運籌管理據點，行政院正積極推動「全球運籌發展計畫」，並擬定具體推動措施，積極改善軟硬體設施與基礎建設，營造健全的通關、租稅、金融與電子商務等之法制與作業環境，使實體配送與虛擬交易環境相互配

合，構建完整之全球運籌運作體系。而因中正及高雄二國際機場為我國的對外門戶，亦為國際運輸的轉運據點，在預期未來台灣地區航空貨運量將不斷成長之下，使得二國際機場之貨運設施需求日益殷切，故惟有持續發展及建設現代化之航空貨運設施，方能增加台灣之國際競爭力，並促使企業以台灣作為全球運籌管理之據點。

- (六) 我國已預計可望於九十年十一月加入世界貿易組織 (WTO)，而於加入 WTO 後，即將解除現行外國人投資航空貨運承攬業之資金及擔任董事、董事長等比例限制之規定。由於目前我國航空貨運承攬業者已高達八百多家，故入會後再開放外國人投資航空貨運承攬業，短期內將可能對國內業者構成競爭之壓力，尤其對部分經營規模較小之航空貨運承攬業可能較為不利，但長期而言，市場開放除可提供使用者更多選擇機會及更好之服務品質外，亦因服務技術提升及國際業務拓展，將為國內業者帶來更多之產值及就業，並增進從業人員素質與經營績效，將有助於改善航空貨運承攬業之產業體質，增進我國整體經濟之發展。而未來各業者除應善用國外之資金及先進之軟硬體設備，以提升經營技術、服務品質及競爭力外，另因市場開放，將可吸引國外整合型運輸業者在台投資，並將中正機場作為其航空貨物轉運中心，安排其機隊飛航台灣，如此將可有效帶動我國航空貨運相關產業之發展，增加我國成為亞太空運中心之競爭力，並可助

益於全球運籌計畫之發展。

二、建議

（一）提升貨物通關效率

過去政府在推動亞太空運中心之政策下，海關之作業已有相當顯著之改善，且空運貨物平均通關時間亦大幅縮短，然由於海關之作業對於空運貨物之流通速度影響甚鉅，因此，未來海關仍應持續致力於改善及簡化相關作業，俾能更進一步提升貨物之通關效率，以增加中正及高雄二國際機場之國際競爭力。

（二）制訂明確之產業發展政策

由於產業的發展對於航空貨運影響極大，例如，近年來我國高科技電子產業的發展、傳統產業的外移、甚至企業生產銷售型態的轉變等，均引起航空貨運需求結構性的變化。因此，政府應制訂明確之產業發展政策，而業者亦應針對產業發展可能產生的影響，研擬因應的營運策略，以共同創造高附加價值航空貨物，帶動航空貨運需求的成長。

（三）加速完成貨運基礎建設

航空貨運相關基礎建設是企業發展全球運籌之關鍵要素，目前民航局與經濟部加工出口區分別於中正及高雄二國際機場周邊推動桃園航空貨運園區與高雄小港倉儲轉運專區之整體發展計畫，該二專區建設完成

後，將可提供國際物流及海空聯運等功能，故未來企業將可運用台灣地理優勢，配合產業政策開發轉口貨運市場，並能快速、便捷的進行跨國的下單、生產、裝配及運銷作業，使物流、資訊流及資金流達到最佳的整合。因此，為有效提升中正及高雄二國際機場之貨運服務機能與國際競爭力，進而達成政府推動台灣成為全球運籌管理據點之目標，政府相關單位更應全力配合以期早日完成前揭二專區之整體發展計畫。

（四）創造良好投資經營環境

目前正值全球整體經濟環境不景氣之時，惟有適當解除相關法令限制，方能創造良好的投資經營環境及吸引外國人投資。目前民航局為吸引外國人投資航空貨物集散站經營業及航空貨運承攬業，並為降低未來加入WTO後對該二產業之衝擊，已配合修訂民航法中之相關規定，擬開放現行外國人投資該二產業之資金比例限制之規定，該修正草案已於日前送立法院審議，故未來立法機關應儘速完成相關立法程序，以期藉由外人投資而帶動航空貨運相關產業之整體發展及促進我國經濟成長與成為全球運籌管理之重要據點。

（五）發展整合型航空貨運服務

近年來，我國為帶動航空貨運中心之發展，提昇國內航空貨運業者的營運效率，引進多家國際整合型航空運輸業，惟最終目標仍在協助國籍業者能加速提昇競爭

力，故航空貨運承攬業者應與國籍航空公司、航空貨物集散站經營業、報關業、地勤業及內陸運輸業等航空貨運相關產業結盟進行垂直整合，發展整合型航空貨物運輸服務，俾能加強資源整合、擴大經營規模及提供全方位之作業服務，進而達到物流一貫化、增加國際競爭力及進入國際市場之目標。

陸、附錄

附錄一、IATA 專題報告資料-Cargo 2000



Presentation

FAPAA

June 18th, 2001



- An Interest Group sponsored by IATA
 - Self funded
 - Not for Profit
- 29 Members:
 - Airlines:** Aer Lingus, Air Canada, Air France, Alitalia, American Airlines, Austrian Airlines, British Airways, Cargolux, Cathay Pacific, Delta Air Lines, KLM, Korean, Lufthansa, SAS, South African Airways, SwissCargo, United Airlines
 - Forwarders:** Baltrans, BAX, Danzas AEI, Emery, Geologistics, Kintetsu, Kuehne & Nagel, MSAS, Panalpina, Schenker, SDV, Yusen



- Objective
 - To improve the efficiency of the air cargo industry, improve customer service and reduce costs to all participants by implementing a program of agreed business processes and automation standards.



- Process and Process Control
- Quality Supported by data
- **Customer Service and Customer Satisfaction**

Key Customer Service Aspects

- Provide a range of guaranteed door-to-door, time definite services globally at competitive price levels
- Deliver as promised against agreed measurable criteria, deliver on-time, deliver complete, deliver secure contents, with no loss, damage or pilferage
- Pro-actively communicate reliable and timely information, including 24 hour 365 day customer service
- Simplify procedures industry wide while migrating to electronic trading
- Ensure accurate billing and total cost transparency between all parties

PROCESS

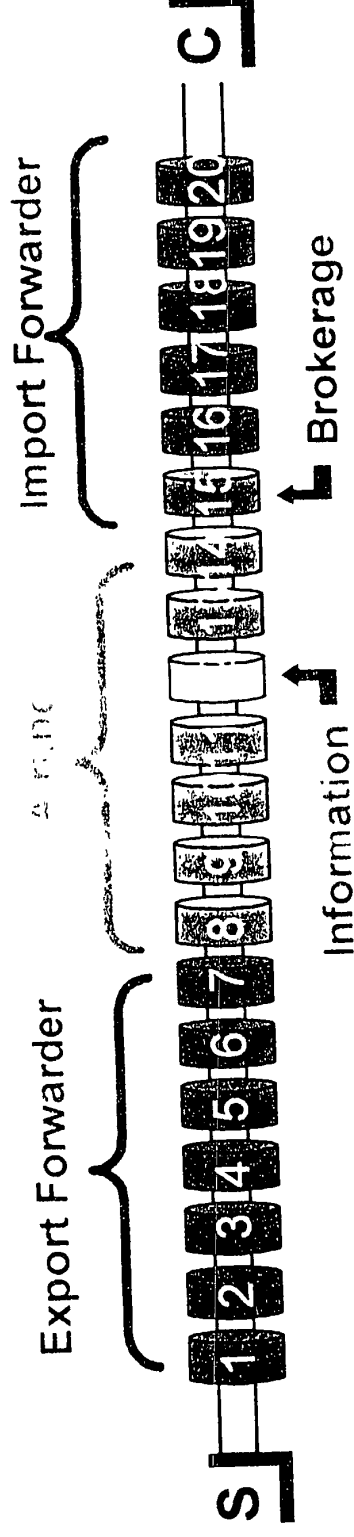
- 40 steps VS 11
- Cargo 2000 tests
- New time-definite Process 20 steps

MASTER OPERATING PLAN

- **MOP: Master Operating Plan**
- **CCF: Cycle Control Framework**
- **CDMP: Common Data Management Platform**

The Master Operating Plan

A practical working document describing 20 basic operating processes



- **Characteristics**

- Flow
- Time & Timeliness
- Information/Planning
- Controls/Conformance

- **Objectives**

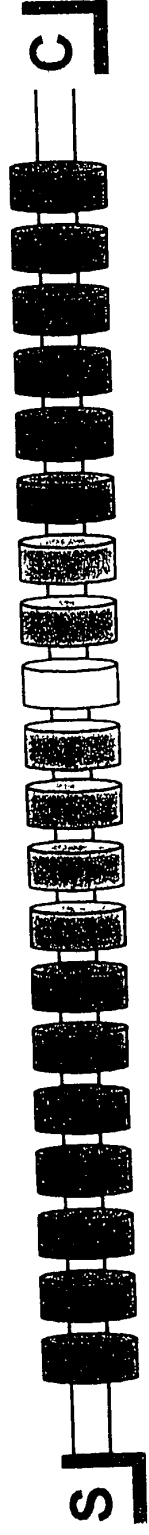
- Time definite, global services
- Cost effectiveness
- Logistics enabling
- Enterprise management

Terminology Used

- **SCD** - a shipment control document that is similar to to-days' HAWB
- **CSCD** - a consolidating shipment control document and similar to to-days' MAWB
- **UPID** - a bar coded label with a unique number for each shipped package
- **SmartScanning** - the capture of data using bar coding technology coupled with automatic computer control
- **CDMP** - the emulation or direct employment of a common data management platform (information pipeline) by all CARGO2000 members to enable the timely distribution of data for cycle control, electronic trading and to facilitate logistics services
- **P1, P2** etc., refers to Process 1, Process 2 etc., in the MOP

What does Cargo 2000 do?

- Plans and Controls the Process of “Moving the Freight”
- One essential tool it uses to do that is the “Route Map”

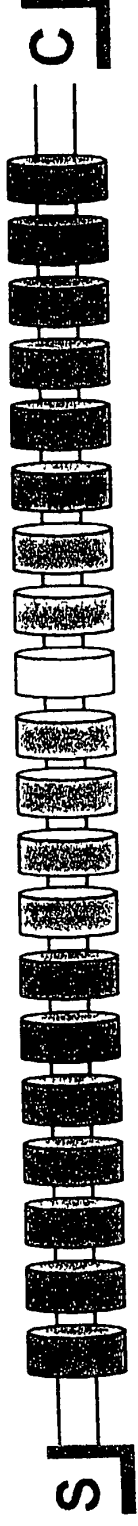


What is a Route Map?

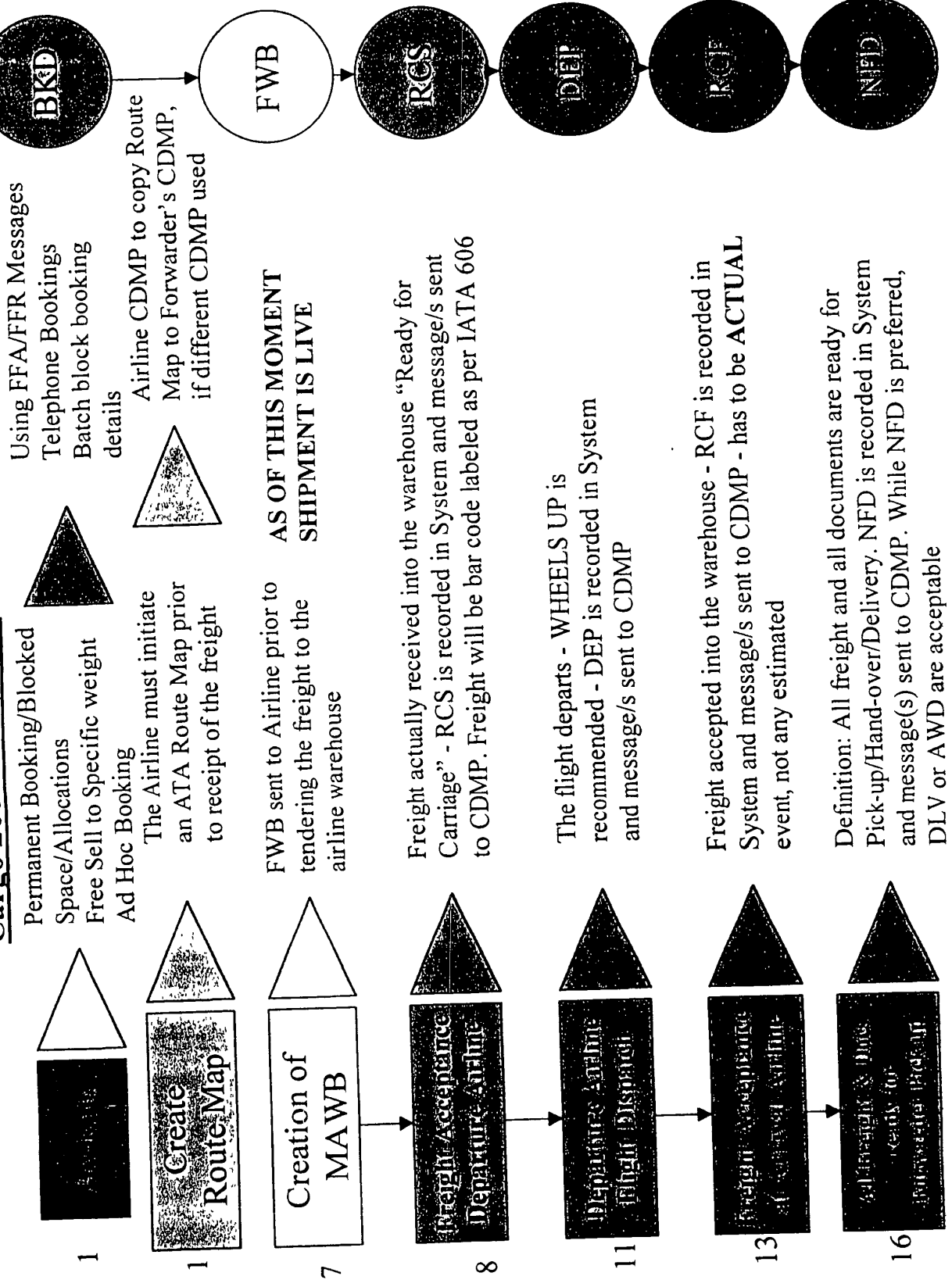
The Route map describes the path the freight shipment follows.

It is created when the booking is accepted and includes flight bookings as well as the checkpoints/timestamps required in the various Phases.

Progress of the freight is continually compared against the route map to determine whether the freight will meet the service commitments.



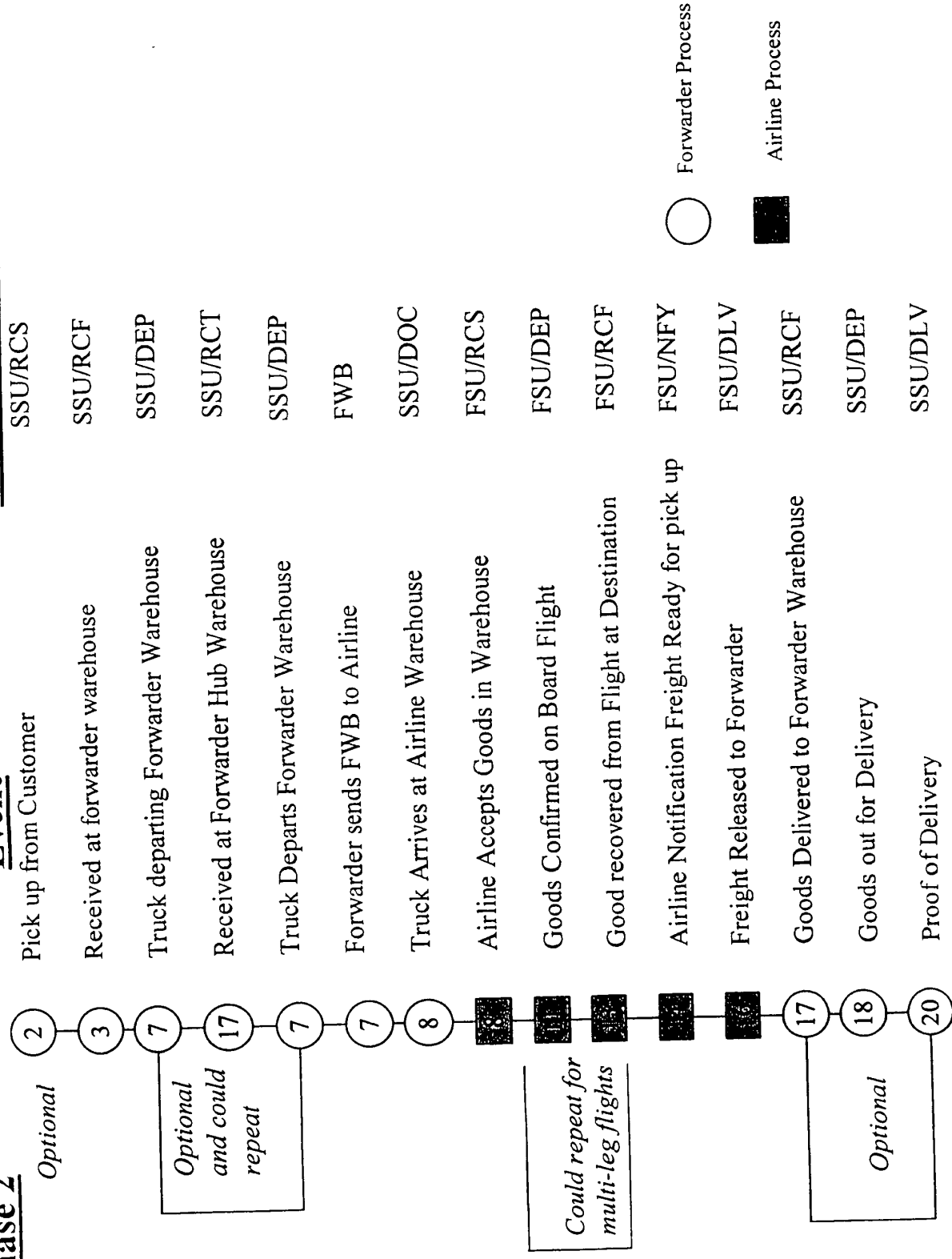
Cargo 2000 - PHASE 1



Phase 2

Event

Proposed Message



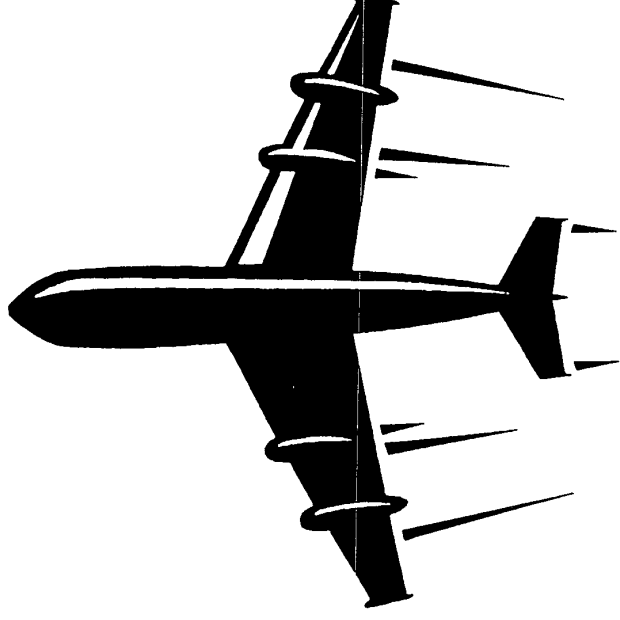
Cycle Control M01

By the time that process data entry is complete the CDMP needs to have following information - (FWB)

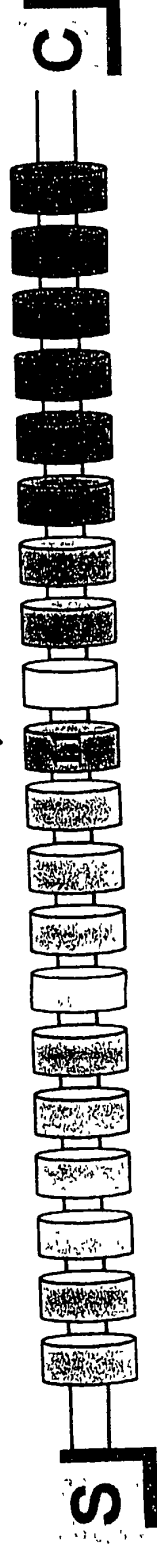
- **Origin**
- **Destination**
- **Shipper Address**
- **Consignee Address**
- **Route Map**
- **Pieces**
- **Weight**
- **Dimensions**
- **Commodity (description & possibly harmonized tariff code**
- **Collection time stamp**
- **Warehouse arrival time stamp**
- **SCD number linked to UPIDs, linked to a collection reference number where applicable**

P11- Airport Ramp & Departure

- All freight and documents loaded
- Flight Departs - Wheels up - Carrier sends DEP message
- **ALL INFORMATION CAPTURED IS SENT TO DESTINATION FOR PRE-CLEARANCE**



'Wheels-up'



Quality System

- **Why do we need it?**
- Because Customers want us to have one - It is the language they speak
- Because Customers are tired of statements not backed up by data
- Because it makes all participants better companies
- Because it makes our program credible
- Because we CANNOT certify if we do not have a robust Quality System and STANDARDS

What does the Cargo 2000 Quality System do?

- **IT MEASURES**
 - How many times did we set the alarm (event) vs. how many times did the alarm ring.
 - Flown as booked
 - On-time Performance - The Original planned delivery vs. the Actual final delivery
- **It establishes exactly what to measure and how for ALL members**

Improvement

- The single 'most' important item of the Quality System
- The Quality System requires that the Organizations:
 - Implement a Corrective Action System
 - Implement a Preventive Action System
 - Continually Improve

Improvement

- It does NOT matter where we are today or where we ‘think’ we are
- **What matters is that we find out where we are and IMPROVE CONTINUALLY**
- **What matters is that the Improvement MUST BE in line with the Customers changing requirements**

Standards

- Can a Carrier or a Forwarder establish and implement Quality Standards like Cargo 2000 on their own?
- Can a single company do the benchmarking and provide the standard measurement process that Cargo 2000 offers?
- Can a single company establish best practices and benchmark best known methods as efficiently as Cargo 2000?
- Can a single company develop Operating Standards that will be acceptable for the entire Industry?

• **I DO NOT THINK SO!**

- Every single Organization would develop their own system and would go their own direction, as has happened for the last forty years

Conclusion

- American Shipper: ...Collaboration is coming - just not overnight. Companies must overcome doing business as adversaries
- Working together is much more advantageous than fighting each other
- Cargo 2000 is asking each Organization to participate and contribute in this 'joint' effort to improve the Industry.
- **CARGO 2000 CAN IMPLEMENT AND ENFORCE STANDARDIZATION!**
- **I BELIEVE THE PAYBACK IS GUARANTEED!**

CASS

Implementation/Operation

A study is conducted by IATA to ascertain the feasibility of implementing a CASS in a given country. To assist in the process, market input is sought regarding the number of airlines serving the country, estimates of the amounts to be settled annually and the number of air waybills to be processed. Any other pertinent information is also welcomed.

Each IATA Member operating or having placed stocks of their Air Waybills with IATA Agents in that country may participate in a Feasibility Advisory Group. Ongoing dialogue with customers once a CASS is operational is undertaken through the local and global groups.

Meetings with national associations of forwarders also convened both during the feasibility process and on an ongoing basis to ensure full industry consultation.

IATA will implement and continually enhance a local CASS solution which responds to and meets customer needs and expectations.

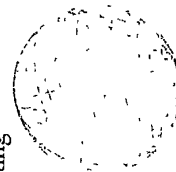
IATA appoints a Manager who will be responsible for the management and operation of the system.

Airline Participation

Once CASS is operational, or during a pilot introduction plan, IATA Member airlines may elect to participate by notifying the Local ISS Manager. Non-IATA carriers, General Sales Agents and Ground Handling Agents may also participate provided certain criteria are adhered to.

Cost Sharing

The costs for managing and maintaining a CASS are shared by the participating carriers. A joining fee, set locally, will be levied.



CASS-import services are also available.

How to Contact Us

IATA has a team of people devoted to assist you on CASS matters. For information regarding the new CASS, or for general information regarding CASS operations, please contact:



Address

International Air Transport Association
IDS Cargo
800 Place Victoria
P.O. Box 113
Montreal, Quebec, Canada
H4Z 1M1



Telephone

+1 (514) 874 0202
ext. 3422



Fax

+ 1 (514) 874 2660



Internet

Visit our site on the worldwide web at www.iata.org
or e-mail us at
Suberoj@iata.org
or
Hughesg@iata.org

For specific information or inquiries regarding a current operation, please contact the local ISS Manager.



INTERNATIONAL AIR TRANSPORT ASSOCIATION



CASS

THE CARGO ACCOUNTS SETTLEMENT SYSTEM



附錄二、IATA 專題報告資料-貨物清帳服務系統 (CASS)

CASS

THE CARGO ACCOUNTS SETTLEMENT SYSTEM

Introduction

IATA developed the Cargo Accounts Settlement System with the aim to simplify the reporting of cargo sales and settling of accounts between cargo intermediaries and carriers

The systems (CASS-Export and CASS-Import) have been so successful that we are proud to see them in more than 30 countries around the globe. They attend to the needs of

- More than 7000 Agents
- Processed more than 13 million documents
- Settled close to \$12 billion in 1998

To ensure complete compatibility with the market place, the systems are introduced in close cooperation with national associations of cargo agents and freight forwarders

Advantages of CASS

The introduction of CASS significantly reduces expensive and time-consuming clerical functions. Central reporting and invoice production through the "Settlement Office" offers numerous advantages to both carriers and agents

- application of today's technology justified by economies of scale,
- standardisation of EDP procedures and forms,
- production of industry standard invoices by Settlement Office,
- simplification of remittance agents pay one amount covering payment to all carriers, carriers receive one amount covering payment from all agents,
- handling of remittance irregularities conducted impartially, using standard rules, without discrimination,

- elimination of duplication of data entry Agents and carriers using their own EDP systems may deliver or receive sales and standard invoice information in electronically readable form,

- centralisation of error handling (by Settlement Office),
- enhancement of financial control and improvement of cash flow,
- provision of reliable and up-to-date sales statistics,
- supervision of processing by an IATA employed CASS Manager,
- training (for Agents and Carriers),
- IATA Cargo Agents do not have to pay extra fees for participating in any CASS program

Traditional Settlement of Accounts

Export air freight normally reaches airlines via cargo agents. The agents collect freight charges from shippers for payment over to the carriers. Certain carriers require that agents report sales made on their behalf. Other carriers may produce invoices to their agents for these sales. Agents work with many carriers and carriers accept consignments from many agents. Each carrier receives a report from, or prepares an invoice to, each agent individually.

This multiplicity of invoices and reports must be checked and consolidated and payments have to be made individually. The situation is an administrative burden to carriers and agents alike. It looks something like this:



Principal Function of CASS-Export

A carrier may participate in every function of a CASS, and be a Full Participant, or may join as a Billing Participant if it already performs certain data-entry functions in its own EDP System. Carriers submit a copy of an electronic record of each air waybill issued during a reporting period to the Settlement Office for processing. From that data the Settlement Office produces standard invoices. During the processing of an air waybill data, the Settlement Office advises the CASS Manager of any discrepancies in reporting or remittance by carriers or agents.

Each agent receives an invoice in respect of each carrier it works with, and a statement indicating the total amount due to all carriers. Each carrier receives the reciprocal accounting information. Agents have the option to ask that the invoices are produced and sent to each of their accounting offices separately.

Both agents and carriers have adequate opportunity to query an unclear entry as the invoices are to be produced about two weeks in advance of the remittance date. On that date, the agent remits the total amount to the Settlement Office's hinge account from which one payment is made to each carrier.

The CASS Manager will carry out appropriate follow-up action as set out in the Cargo Agency Agreement. In case of a dispute, parties may ask the CASS Manager to act as a neutral mediator between them.

A CASS equivalent diagram looks like this:



附錄三、台北市航空貨運承攬商業同業公會專題報告資
料-電子商務 (E-Commerce)

**B2B
NOT ONLY MEANS
BUSINESS TO BUSINESS
BUT ALSO
BACK TO BASICS**

**YOU SAW
BUT YOU WERE NOT REALLY SEEING
YOU HEARD
BUT YOU WERE NOT REALLY LISTENING
YOU SPOKE
BUT YOU WERE NOT REALLY SPEAKING**

B2B

**BACK TO BASICS
WHEN IT COMES TO A SMART CHOICE
TOP UNIVERSITIES
HAVE GONE BACK TO THE BASICS**

FREIGHT FORWARDER

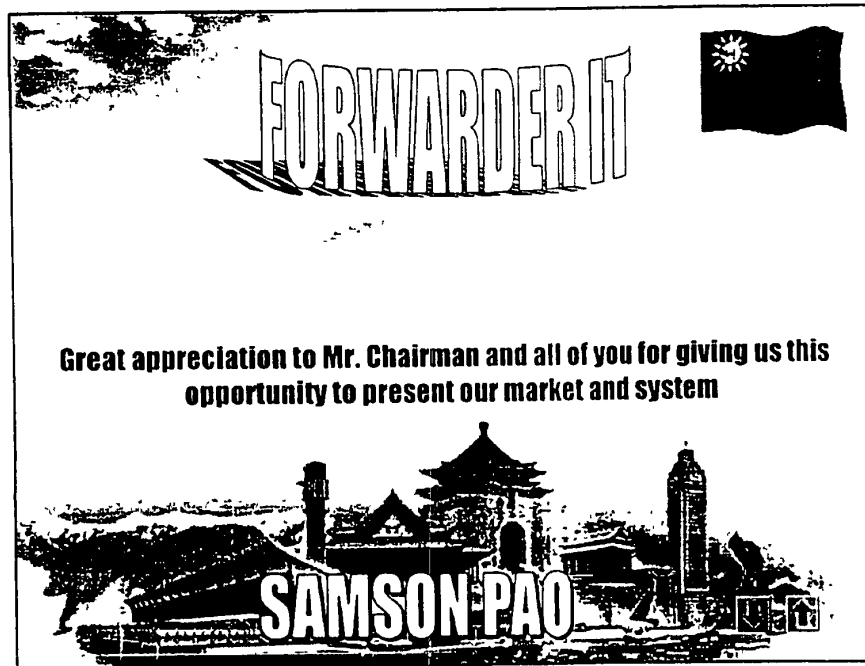
**INTEGRATED BASIC AND E-SYSTEM
FOR RELIABILITY AND COST SAVINGS**

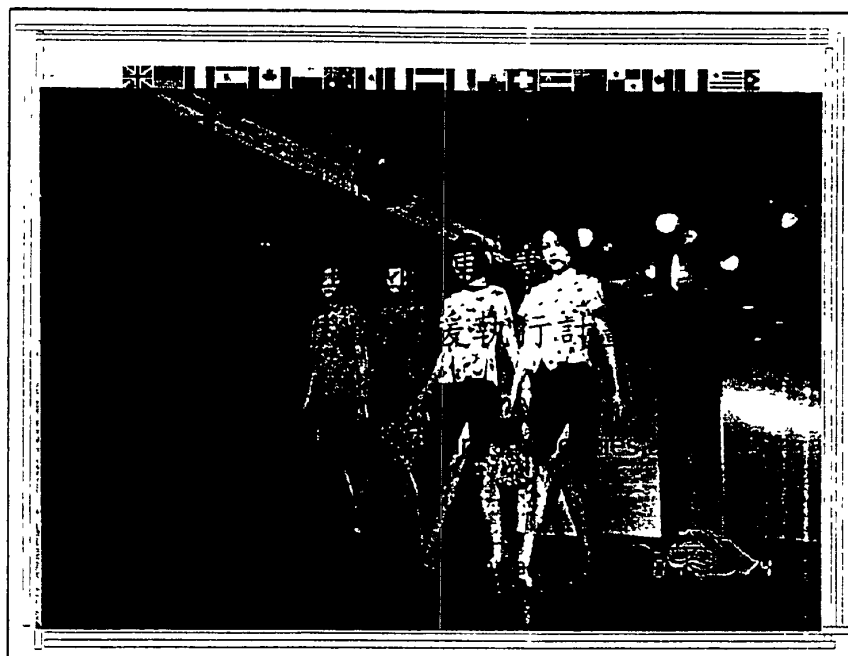
HELPS YOU GET AHEAD OF THE LEARNING LOGISTICS

B2C

**NOT ONLY MEANS
BUSINESS TO CUSTOMER
BUT ALSO
BASIC TO CLASSIC**

**DON'T FORGET
OUR MEMBERS
HAS THE WAY
TO MEET YOUR REQUIREMENT**





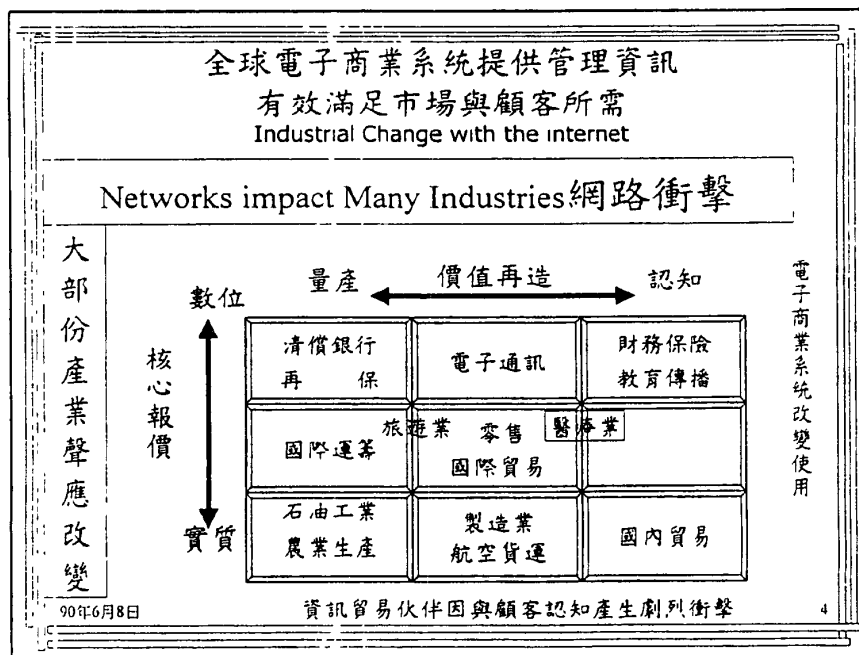
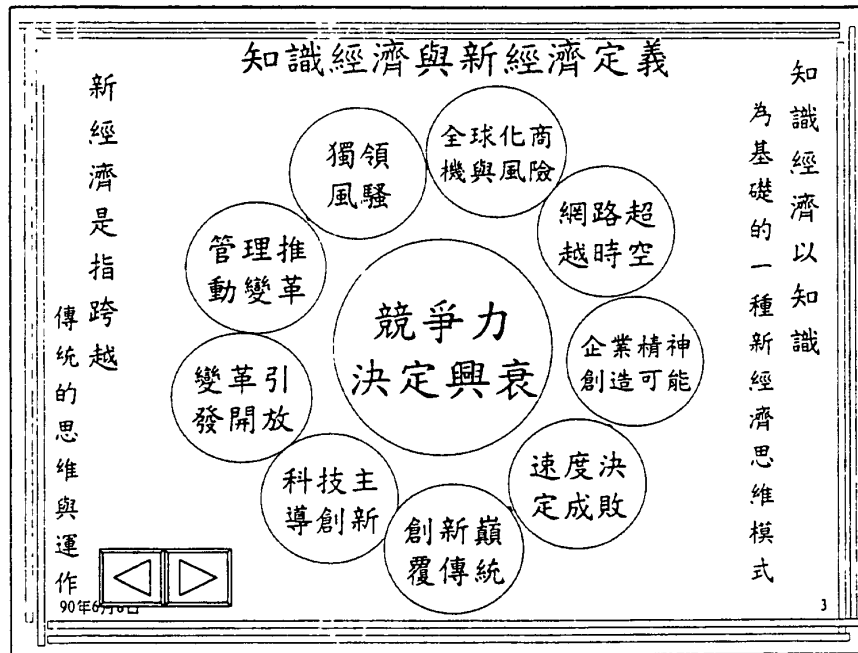
市場背景

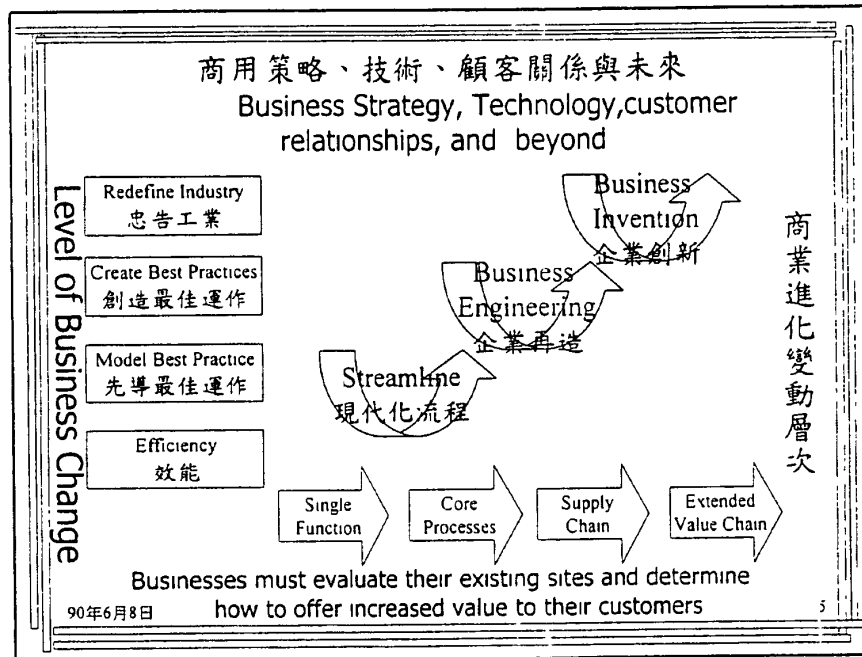
歡迎光臨!!

- ☞ 台灣資訊業產值是全球第三，僅次美國和日本，半導體產值是全球第四，排在美國、日本和韓國之後。
- ☞ 天下雜誌一千大製造業前一百名中資訊電子業佔了四十七家。
- ☞ 臺灣航空貨運市場百分八十一為高科技與其相關產品。為精確化、有效化、效率化保有市場多數企業應其貿易伙伴要求建置網際網路為網路價值鏈供應鏈整合而努力以赴。
- ☞ 擁有市場提供後勤支援之航空貨運業界面臨整合、跨國業者之挑戰。
- ☞ 臺灣航空貨運市集形成，可有效減少作業流程；縮短廣義通關時間，增加全球運籌競爭力。

90年6月8日







航空貨運整合經驗

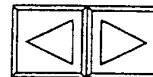
- ④ 全球聯運垂直水平整合國際運輸業、航空貨運承攬業、集散倉儲業、國內運輸業有效以中央廚房概念支援本業繼續保有快遞業務市場，獲利斐然。
- ⑤ 航空貨運站垂直水平整合國際運輸業、航空貨運承攬業、集散倉儲業有效以中央廚房概念支援本業繼續保有集散倉儲業務市場，第一年開始獲利。
- ⑥ 垂直水平整合電子商務作業平台、共同作業系統是本業之憧憬與目標。

90年6月8日 6

Index 綱要

- Program Scope and Overview
專案範圍與瞻望 國際化
- System Set-up and Quality Control
業界系統現況與目標設立與控管
- Financial Logistics
財務後勤支援
- Information Techniques Management
資訊管理
- Planning, Strategies, and Scheduling.
計劃策略與進度表
- Pilot Test Interfaces
先導測試之公共建設
- Reports and Metrics 彙報測試

90年6月8日

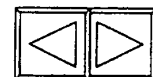


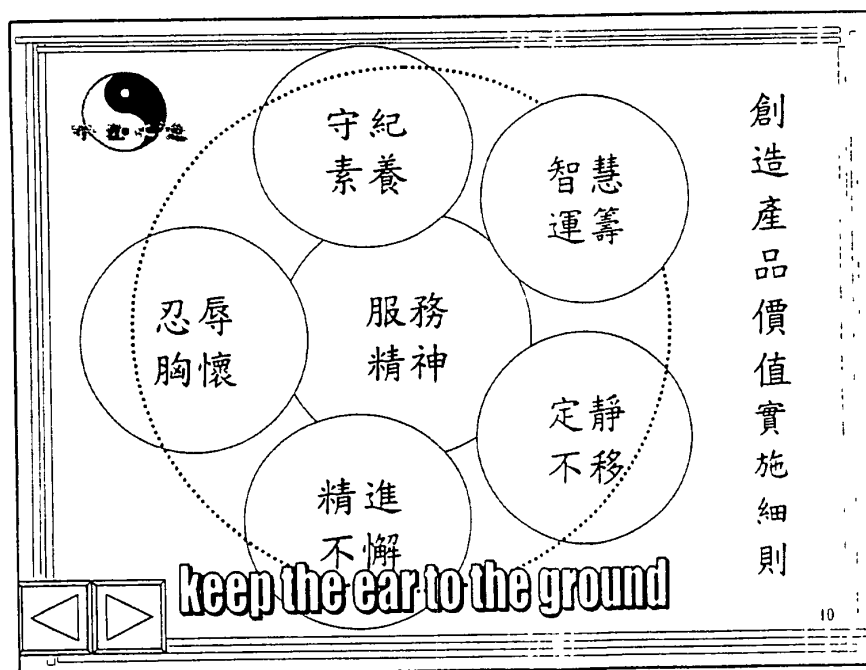
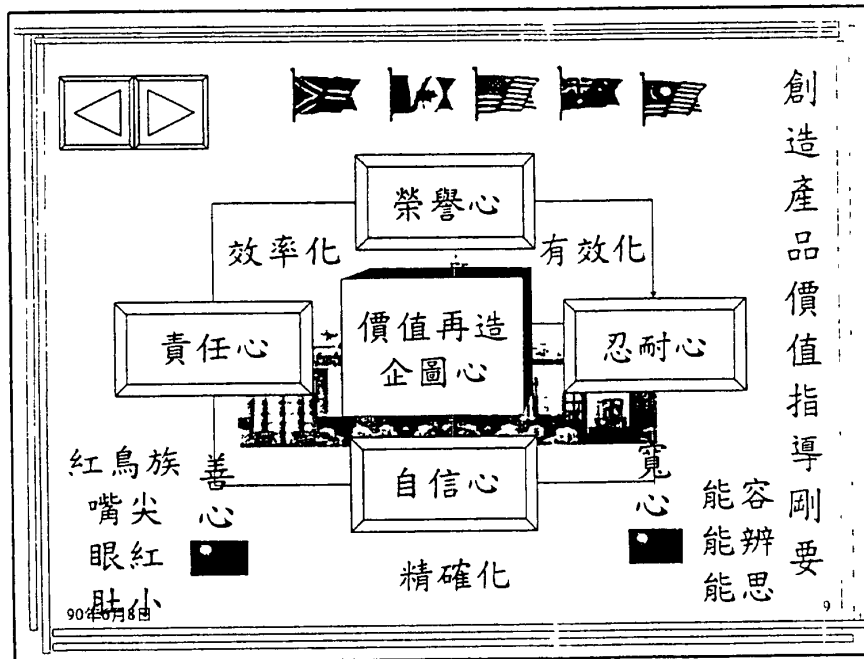
7

Program Scope and Overview

- Scope: 專案範圍與瞻望
輔導會員提昇電子商業化與電子商務化並完成水平
整合以創造競爭力
- Measuring and Managing The value of Program
專案評鑑與管理
 - Why Value Value? 為什麼需要價值評鑑?
 - The Value Manager 評鑑管理者
 - Fundamental Principles of Value Creation
價值創造基本原則
 - Metrics Mania: 特殊檢測
 - Surviving the Barrage of Value Metrics 檢驗測量價值量度
 - Cash is King 現金主導觀
 - Make Happen 促成實現
 - Mergers, Acquisitions and Joint Venture

90年6月8日 平台合併、併購合資經營



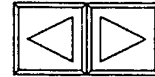


顧客關係與未來 Customer Relationship & beyond

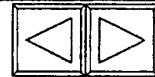


- 傳統產業關係淘汰論
- 創造業界網路經濟品牌的經營(UPS, FEDEX & Cargonet)
Differentiation (差異化)
Relevance (關聯性)
Esteem (尊貴度)
Knowledge (知識)
- 垂直水平整合客戶關係管理
獲取新客戶 (acquiring new customers)
提升現存關係 (enhance existing relationships)
保留客戶關係 (retain customer relationships)
客戶關係管理不能再如同過去依賴銷售人員個人的魅力

90年6月8日



虛擬商業運籌組群 Virtual Business Logistics Communities



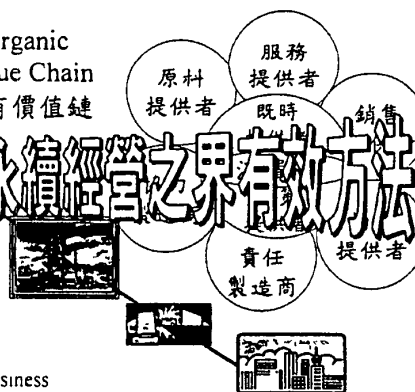
Organic
Value Chain
固有價值鏈

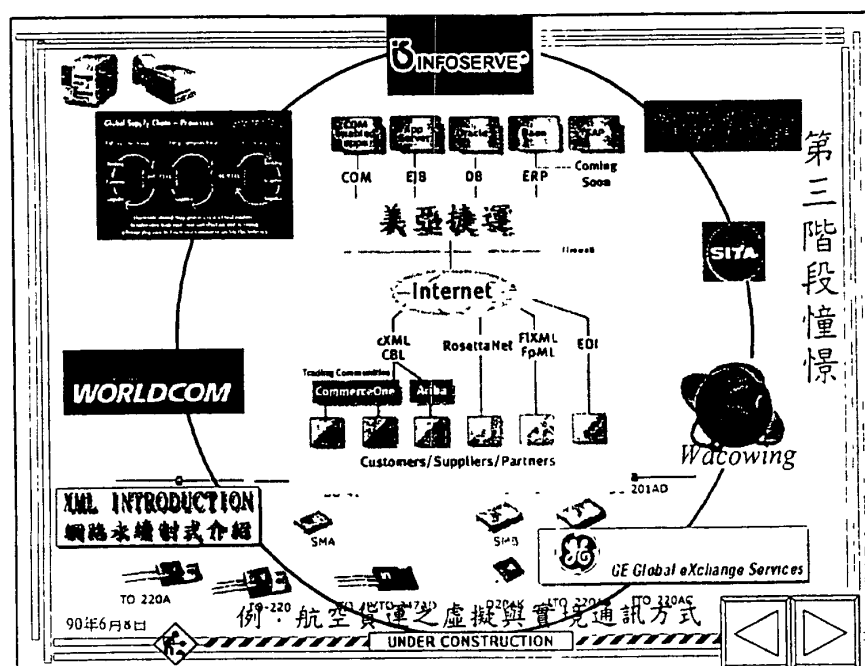
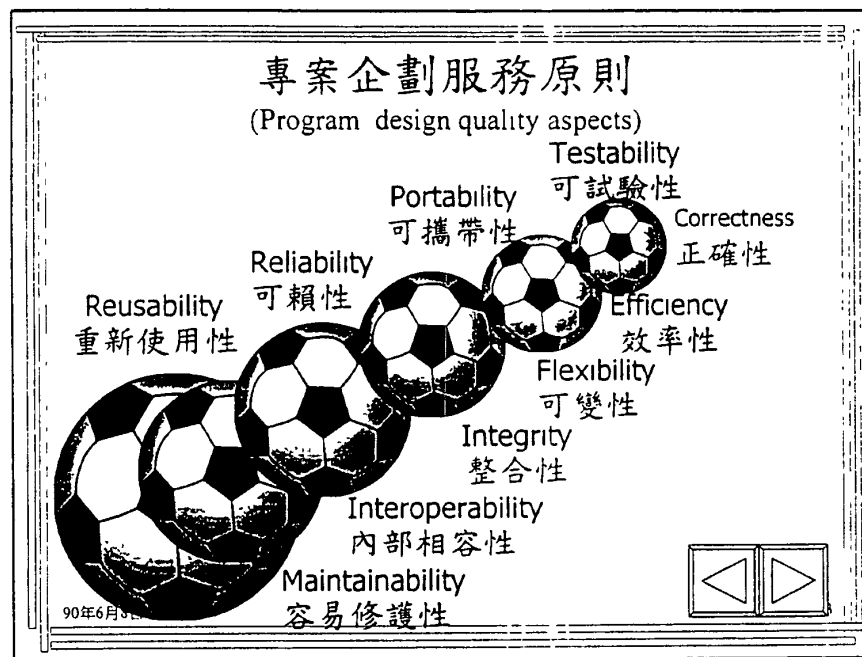
提供運籌介面是永續經營之有效方法

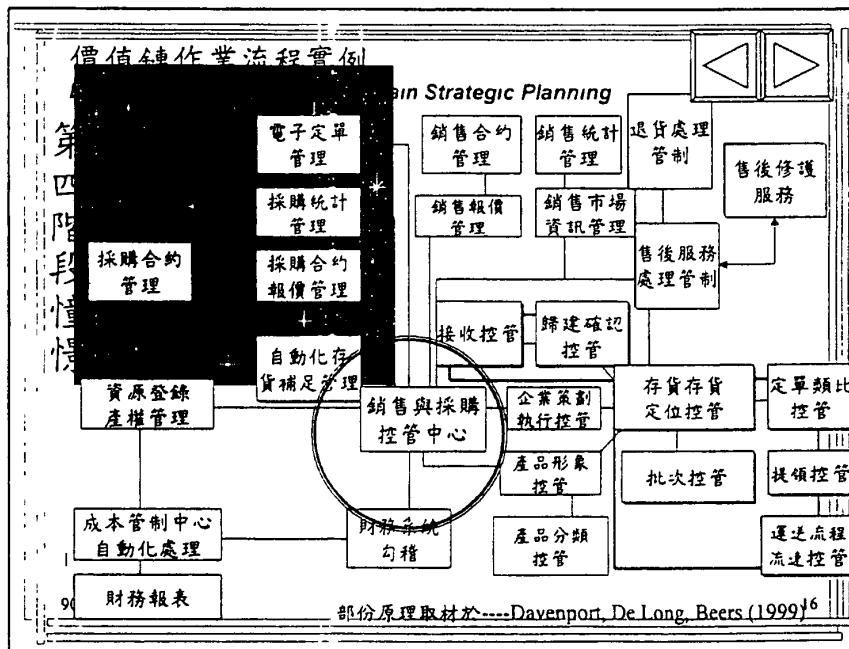
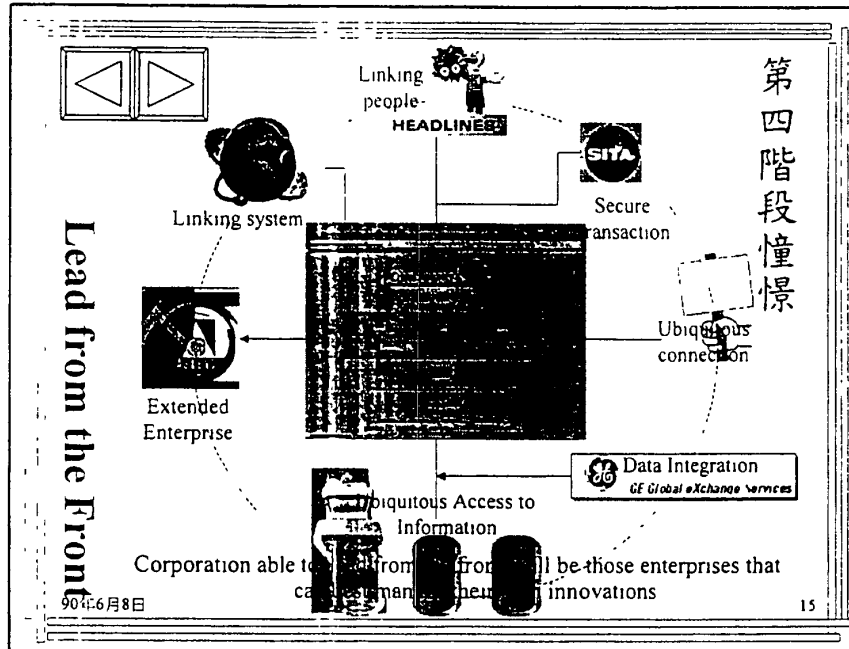
Sequential
Supply Chain
永續供應鏈

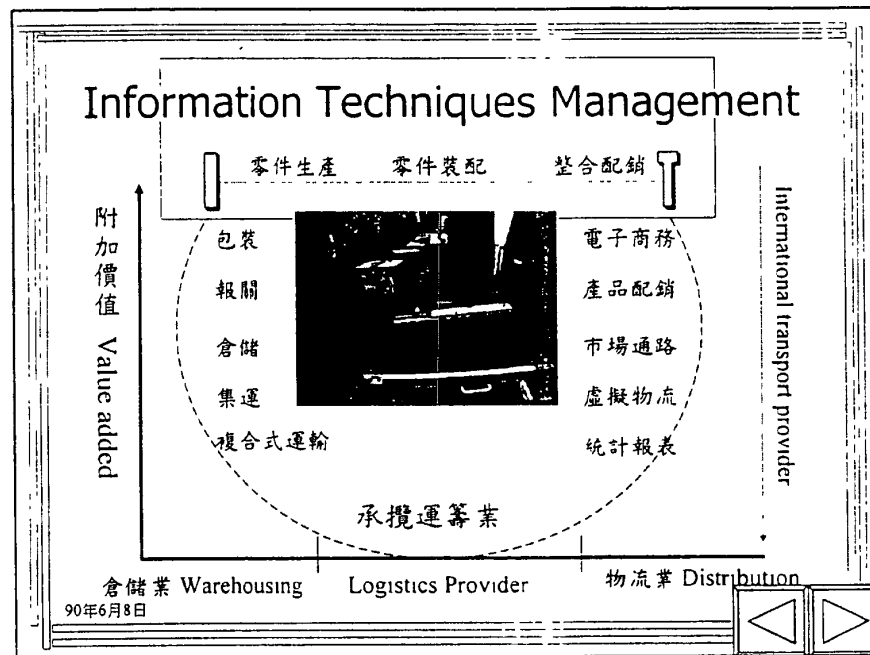
Virtual business communicates in e business
Relationship required online communication
To transfer vital information

The e-business Value Chain









Planning, Strategies, and Scheduling.

計劃策略與進度表

- 貳千零壹年貳月完成主計劃與任務分組。
- 貳千零壹年肆月完成政府後勤與立法支援。
- 貳千零壹年肆月完成宣導測試。
- 貳千零壹年肆月取得先導測試之軟硬體與建置。
- 貳千零壹年肆月完成網路測試彙報。
- 貳千零壹年伍月完成會員電子郵件測試彙報。
- 貳千零壹年拾月完成會員電子郵件測試彙報。
- 貳千零貳年肆月完成進出口商測試彙報。
- 貳千零貳年拾月完成垂直水平貿易伙伴測試彙報。
- 貳千零參年拾月完成整合測試彙報。

90年6月8日

附錄四、澳洲國際承攬業聯盟報告資料



AUSTRALIAN FEDERATION OF INTERNATIONAL FORWARDERS Ltd.

AFIF COUNTRY REPORT 2000 - 2001

For presentation to the delegates attending the
28th FAPAA E.C.M. in Manila, Philippines, June 18 - 19, 2001

The following are the main issues currently affecting Freight Forwarding in Australia.

- **CUSTOMS CARGO MANAGEMENT RE-ENGINEERING** - Australian Customs Project to completely overhaul all Cargo Reporting methodology and systems; also introducing new legislation to include a 'Strict Liability' penalty regime
- Prevention of **FOOT AND MOUTH DISEASE** from entering Australia; the methods and associated costs for Industry
- **CARGO MANAGEMENT RE-ENGINEERING (CMR)**

The Customs Department submitted Bills to Parliament late last year in order to implement it's Cargo Management re-engineering project. Despite some positives Customs proposed the introduction of a 'Strict Liability' Penalty Regime (*ie. no error or criminal intent needs to be proven in order for Customs to issue an infringement notice with a financial penalty attached – in the same manner as a speeding or other traffic offence*)

The Bills were referred to a Senate Inquiry in which AFIF participated by written submissions and an appearance before the Senate Legislation Committee to object to the more 'draconian' aspects of the changes.

It is timely to now advise you that despite the objections of many Industry bodies, Australian Forwarders are likely to face penalties for late and inaccurate reporting of cargo, despite the fact that they are not the originators of the information, only a 3rd party **This may have an impact upon FAPAA Members.**

The Act, if passed, will legislate that all cargo is to be reported to the Australian Customs Service, electronically - **2 hours before aircraft arrival** and in the case of ocean freight –

24 hours before vessel arrival. This initiative, we are told, is designed to allow Customs to accurately risk assess cargo and to try and reduce the importation of prohibited substances (particularly narcotics).

The main issue of concern for our Industry is that frequently this information is not received within these time-frames and resultant penalties may be applied. It is proposed by Customs that a moratorium of at least 6 months (and possibly a further 18 months) may be introduced, after which penalties may be applied. The discretionary nature of the process is also of serious concern to our Industry in that there may be opportunity for unfair subjectivity or vindictiveness to occur.

Whilst objecting most strongly to the penalty provisions, we are suggesting a process of partnership with Customs to ensure compliance and that the threat of penalties for offenders should be more of a commercial than monetary nature. Unfortunately, some of the worst offenders in the past have contributed to this hard line being taken by the authorities.

Our Members are going to even more reliant on the full support of their overseas agents in providing the data in a timely and accurate manner in order to avoid the threat of a penalty.

Please notify your respective Members in advance, so that they can prepare to assist in meeting our Members obligations.

- **FOOT AND MOUTH Disease; The Threat to Australia and the Preventative Measures in Place.**

Australia's border authorities are working desperately to prevent the potentially catastrophic effects of the highly contagious 'Foot & Mouth' Disease from entering Australia. The ramifications of this could be disastrous for our livestock Industry and resultant export earnings. The Australian Federal Government has recently announced an additional half-a-Billion Dollars from the Budget to provide the additional resources required. Customs & Quarantine will join forces to increase surveillance, which will include 100% examination of all Air & Sea Containers and Passenger Baggage. In addition they will be targeting aircargo 'Express' items which have previously been thought of to be low risk. The authorities are taking no chances. All of this comes at a cost, both in Government 'cost-recovery' charges and potential cargo delays. The Industry is currently working with Government to determine the best way of implementing the additional cost-recovery measures.

We have notified you of these issues to ask you to help us keep Foot and Mouth out of the country and to ask that you are aware of the possible delays of cargo required to be inspected (and possibly sent for fumigation).

These are the main issues affecting Australian Forwarders at this time and we welcome any FAPAA Member to contact us, should they require further detail on this or any other activity.

Update on activities from last year's report

- **GST**

The introduction of a Goods and Services Tax (GST) into Australia occurred as planned on July 1st 2000. A year-long campaign of education and tax office 'rulings' had occurred prior to the application of the new tax legislation, resulting in a reasonably smooth transition.

One of the remaining issues for our Industry relates to the application of GST to charges being billed back overseas (DDU/DDP), particularly where the Exporter has an Australian resident division of their company. This is a subject that still causes confusion for many organisations.

AFIF played a significant role in assisting with the transition to the new tax system by delivering almost 50 seminars around Australia to the Forwarding and Import/Export community. We also received a training grant from the Federal Government for this purpose. We remain part of an Industry/Govt Tax office 'partnership' group dealing with GST related issues as they arise.

- **OLYMPICS**

Sydney played host to a very successful Olympic Games and despite predictions of traffic and transport chaos, everything worked extremely well. There were no traffic delays and Olympic related and general cargoes moved freely. Perhaps the efforts of those involved in preparing for the worst ensured a trouble-free time. Business worked with Govt to stagger staff working hours - avoiding traditional peak periods - and most transport operators worked during night periods to move cargo around, leaving relatively clear roads during the day. The most common complaint afterwards was: 'why can't we continue to do this all the time'? But, alas, we are now back to normal !

We are happy to answer any questions and elaborate further on any subjects relating to Australian activities during the relevant session at the meeting

Report prepared by

Brian Lovell

Chief Executive Officer

Australian Federation of International Forwarders Ltd



AUSTRALIAN FEDERATION OF INTERNATIONAL FORWARDERS Ltd.

TRAINING & EDUCATION REPORT - 2000/2001

***For presentation to Delegates attending the
28th FAPAA E.C.M. in MANILA, Philippines, June 18 -19, 2001***

In addition to the standard program of vocational Training and Education conducted by AFIF, we were delighted, in March of this year, to finally announce the introduction of a Traineeship for our Industry. Whilst the subjects that AFIF currently offers under it's program cover most of the Operational and Regulatory requirements there are a number of missing elements called 'units of competency' essential for accreditation to a Traineeship, such as: basic Office Skills, Sales and Marketing, accounting etc. We have combined the training strengths of AFIF with an Organisation who have spent a great deal of time on the development of modules geared towards a Traineeship

The Traineeship has received Accreditation from the Australian National Training Authority

A project for the future will be to combine all of these modules with other units of higher education, to take it to a Diploma and eventually a Degree level.

In the meantime, AFIF has consolidated its position as the leading trainer of subjects required by Operational Personnel in the Freight Forwarding and related industries in Australia. A list detailing the type of courses provided by AFIF is attached to this report

The Education and Training portfolio within FAPAA is very much geared towards sharing information on the developments in all Member countries and in this regard, we look forward to hearing how other FAPAA Member Countries have progressed with their Education and Training Programmes.

We remind our FAPAA colleagues that AFIF is ready and willing to assist other FAPAA Members in the area of vocational Training, as we have done with SLFFA, Sri Lanka in the past

Report prepared by Brian Lovell

Chief Executive Officer

Australian Federation of International Forwarders Ltd

AFIF VOCATIONAL TRAINING SUBJECTS, 2001

Dangerous Goods Acceptance (Air)

Dangerous Goods Re-Certification (Air)

Dangerous Goods Awareness (Air)

Dangerous Goods By Sea

Dangerous Goods By Road (*New Course***)**

International Export Air Freight Procedures

Basic Import Air Freight Procedures

Basic Import/Export Sea Freight Procedures

**Aviation Security Regulations Intro/Re-
certification**

Load Distribution And Restraint

Perishable Airfreight Awareness *New
Course*****

Claims Procedures

附錄五、泰國航空貨運承攬公會報告資料



Thai Airfreight Forwarders Association

Country Report for Thailand

TAFATh New Address

Thai Airfreight Forwarders Association

874 Ploenchit Road ,
Lumpini, Pathumwan,
Bangkok 10330

Tel : 66 2 254-5780-3

Fax : 66 2 254-5784

E-mail : tafa@tafathai.org

<http://www.tafathai.org>

TAFA Committee 2000-2001

Chairman	Mr. Keree Chaichanavong
Vice Chairman	Mr. Kovit Thanyarattakul
Vice Chairman	Mr. Chairat Pitpisutkul
Vice Chairman	Mr. Kasem Jalayawongse
Vice Chairman	Mr. Phongsagorn W.rungsrikajorn
Hon. Secretary	Mr. Noppadol Sombattaveekul
Hon. Treasurer	Mrs. Urai Choothakarn
Registrar	Mr. Rath Smuthkochorn
Public Relations	Mr. Khlang Tantimongkolsuk
Reception	Mr. Nuthaweat Santisarun
Directors	Mr. Tomihiro Sumiyama
	Mr. Winai Pooripunyawanich
	Mr. Veera Satchatippavan
	Mr. Monchai Jirakiertivadhana
	Mr. Somsak Thong-Ngok
Asso. Manager	Mr. Krit Sirichanya
Honorary Chairman	Mr. Varin Pulsirivong
Honorary Advisor	Mr. Kanit Smithivas
Honorary Advisor	Mr. Amarit Pansiri
Honorary Advisor	Mr. Pipat Ratanatraiphob

TAFA Members

TAFA Members	110	Companies
----------------	-----	-----------

Ordinary Members	89	Companies
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Associate Members	21	Companies
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During the year 2000, the Association has had another 7 new members of which three are ordinary members and the rest four are associate members.

TAFA Training Programme 2000

TAFA has arranged several training courses for its members, and being conducted by the officers from "Japan Airlines and Cathay Pacific airlines." The following training courses have been done successfully with the cooperative organization of current Executive Committee during 2000-2001

Course Title & Duration	Participant	Instructor	Certification
Basic Cargo Tariff 2000 From 21 February To 25 February	24 persons	Cathay Pacific	Cathay Pacific
From 20 November To 24 November	44 persons	Cathay Pacific	Cathay Pacific
DGR Course 2000 From 1 March To 6 March	29 persons	Japan Airlines	Japan Airlines
From 20 March To 24 March	26 persons	Japan Airlines	Japan Airlines
From 4 September To 8 September	25 persons	Japan Airlines	Japan Airlines
From 18 September To 22 September	28 persons	Japan Airlines	Japan Airlines
Basic Cargo Tariff 2001 From 23 April To 27 April	36 persons	Cathay Pacific	Cathay Pacific
DGR Course 2001 From 5 March To 9 March	21 persons	Japan Airlines	Japan Airlines
From 19 March To 23 March	24 persons	Japan Airlines	Japan Airlines

Default Insurance Programme

The program is in place with the agreement of the major Carriers and TIFA-Thai. The focus is on the financial status of the forwarding agents in the Industry. The program would provide the financial security to the participants (Carriers) in the form of financial recovery if there is any default of freight payment by the members of TIFA-T. The agreement also takes away the financial burden, mostly B/G that the members need to increase if Sales Revenue goes up to the extent the Carriers feel unsecure.

The latest status for DIP it was agreed amongst Airlines (ICAP) and agents (TIFA) the programme is to be launched on October 2001. Number of participants from both airlines and agents at the present stage, most slightly would be up to almost 100 percent.

CASS

CASS program has been more or less accepted in principle. The details of how to operate and hold the benefit of all concerned parties are on process of discussion so that the program could be implemented effectively and entails no disagreement on certain inter-practice in the future.

Plan to be implemented is set to be as of October 2001 which is the same time as DIP schedule. However, the number of participants from airlines part has not yet been concluded. The point of focus is "WOULD ALL THE CARRIERS JOIN THE PROGRAM ?"

New Transport Legislation

There will be two new transport laws.

1. M.T.O. Act.
2. Air Transportation Act.

M.T.O. Act. The draft is already done. Now is only waiting for cabinet's approval.

While Air Transportation Act. is still under process of drafting.

New Bangkok Int'l Airport (NBIA) or Suwannabhum Airport

Recent meeting June 4, 2001 from the concerned authorities, the project is set to be on going. Target opening might be late due to add-on conditions both from the change of specifications and also short of support funds. The original opening schedule is on year 2004.

附錄六、菲律賓航空貨運承攬業聯盟報告資料

AFPI Training and Development Center

Executive Summary

One of the avowed long-term objectives of AFPI is the professionalization of its ranks. The Association through its various past Boards do firmly believe that one of the most effective tool in attaining this end is by providing a continuing program for education and training for the staff of its member-companies. An industry run by professionals results in a "cleaner" industry that is rid of crooks and unsavory characters. Competition is practiced within the bounds of ethical standards and is rooted on professional behavior. The international air transport industry run by professionals then assumes a critical function as a national tool for forwarding the country's economic goals and global competitiveness. This has always long been the dream of AFPI.

To give the dream flesh, the Association through its Board initiated the establishment in 1998 of a Training Center to be called AFPI Training and Development Center. The name was so chosen because it was reflective of the basic objectives of the Center which were:

1. To provide a program for continuing training and education for the employees of the member companies. (The "Training" side of the Center's name)
2. To establish an institution that will function as the industry's research and development arm that will make studies/ researches on issues affecting and impacting the industry and make the results of such studies available to the member companies through publication, industry briefings, seminars, etc. (The "Development" side of the Center's name)

Immediately, the "training" side of the Institution's was addressed with the hiring of a Training Director who was tasked to prepare short courses that can immediately be extended to the members. Thus Ms. Nilda Tempongko who used to head PAL Development Academy, the training arm of the national carrier was hired. She immediately launched courses in Basic Cargo Tariff, DGR Handling Course, Basic Supervisory Course, Customer Service Course and such like allied courses.

Meantime to ensure that a core group of instructors will always be available for training, a program of "Training the Trainers" was started which initially had 12 candidates. Those who would pass the course will be the future instructors/trainors of the institute. The program has netted 6 instructors who are now full-pledged instructors and are in fact already conducting most of the courses.

Initially, the courses were conducted using the various training facilities volunteered by member-companies, the first being Airfreight Business Logistics held in February 26, 1998. In the first half of 1999, the Association decided to finally establish a training facility of its own which would also house its Secretariat. This was at the PAIR PAGS Building at the Ninoy Aquino International Airport complex. It was a modern facility that could accommodate up to 30 participants per course. The first course offered and conducted was the Basic Supervisory Training and the institute was off and running.

In the last quarter of 1998, the Center communicated with IATA Geneva on the requirements for the accreditation of the Center as an IATA Training Center and submitted the requirements for accreditation in the first quarter of 1999. The Training Director then went to IATA SIN and underwent the Professional Skills for DGR Instruction to keep her certificate as a DGR IATA Instructor current. IATA Geneva approved accreditation and sent the contract to AFPI for signing. The Board however upon close scrutiny of the contract found the IATA fees to be paid per participant to be onerous and decided to re-apply as an IATA endorsed Dangerous Goods Training School only sending the application to IATA Montreal in April of 2000. The Center is still waiting approval by the IATA Task Force which is reviewing the training materials.

With these moves the short term needs of the industry started to be addressed and are even now continually being addressed. The first half of the first objective—the "Training" side, the short term side --was being met. The other half of the objective, the long-term side: a program of continuing education, remains to be addressed. It is an ambitious dream. This is so because it ultimately involves transforming the Center into a tertiary educational institution that will offer initially undergraduate courses and later, post graduate courses in Transportation giving industry practitioners the opportunity to specialize in the various transport disciplines such as logistics, multi-modal forwarding, I.T. for Transport/Logistics, etc.. In the Philippine context this means establishing an industry-owned College specializing in Transportation.

This is what the Association is single-mindedly pursuing now. It is not just anymore a nebulous dream as when we initially started this journey. Before September of this year the Association will submit to the Commission on Higher Education (CHED), the government agency tasked with regulating tertiary/higher education in the Philippines a letter of intent to establish a College for the industry.

Hopefully by this time next year, with the help of many hands both from here and outside the country, the dream will have become less of a dream and more of reality! We will have to overcome many formidable hurdles: funding, course-content development, faculty development, the physical structures that make a school, the site where the school will be put, marketing the idea of a Transport Professional to a public that perceives no glamour in a staid industry as Transportation. Big difficulties, many helping hands. It was done before: Kargo Bayan Inc., Thru Transport Insurance Brokers Inc., AFPI Training and Development Center: industry initiatives all! If all of these institutions can be put up with many helping hands, why not an industry College?

Initially. .the undergraduate courses, later the post graduate courses. After that the Center for Research and Development! Big dreams?.. Yes! Do-able dreams? Why not?

AFPI Training and Development Center

The AFPI Training and Development Center traces its roots in 1998, when the Aircargo Forwarders of the Philippines, Inc established its own AFPI Training and Development Center, an institute that was tasked to "develop programs for the continuing training and education of the staff of its member-companies" and "make researches/studies on issues, trends and movements that affect and have an impact on the aircargo industry and make the result of such research/studies available to the members "

It finally chose to locate the Center and the Secretariat at the 3rd floor of PAIR PAGS Building which houses one of the several Cargo Terminals making up the Ninoy Aquino International Airport Complex. This is to make the Center easily accessible to the members who normally transact business there

It is a modern facility that has been equipped with the necessary multi-media tools necessary for the effective and lively delivery of the various courses offered

The Center has developed and is continuously developing courses to address the various needs of its member companies be this in the area of operations, customer interface, staff development and management in general And these courses are delivered by highly trained and competent instructors who are specialists in various areas of the business

Currently we are offering the courses listed below The Center however, may develop customized courses tailored to your particular company needs should you need such courses Just coordinate this with the Training Director, Ms. Nilda Tempongko who will jointly design the course with you

REGULAR COURSES

- **BASIC AIRCARGO FORWARDING COURSE**
This course aims to provide participants with the basic concepts of aircargo forwarding operations and skills essential for effective performance
- **ADVANCE AIRCARGO TARIFF COURSE**
This course aims to provide participants with the skills of computing for the most competitive freight charges and cutting the corresponding airwaybills
- **BASIC AIRCARGO DANGEROUS GOODS COURSE**
This course covers the IATA regulations governing the shipment of dangerous goods and the accomplishments of shipping documents related to the acceptance and handling of dangerous goods

- **MANAGEMENT**
This course aims to enhance the managerial competence of participants by exposing them to various management functions. It also provides would be managers with the basic managerial skills needed for development
- **SUPERVISION**
This course aims to provide supervisors and managers with the basic concepts and skills in supervision applicable to an air cargo forwarding office setting
- **EFFECTIVE BUSINESS COMMUNICATION**
This course covers the proper way of writing impact letters, memos, e-mails, proposals and reports as well as delivering effective business presentations and public speaking
- **CUSTOMER RELATIONS PROGRAM**
This course aims to provide participants with the basic concepts of customer relations and interactive skills necessary to be able to effectively handle transactions with air cargo forwarders clients.
- **SALESMANSHIP**
This course aims to provide participants with the basic principles of selling and the skills and techniques essential to become effective sales professionals

SPECIAL COURSES

- **DEFENSIVE AND EFFECTIVE DRIVING**
This course aims at providing the participants the basic concepts of troubleshooting, defensive and effective driving
- **PERSONALITY DEVELOPMENT**
This course aims to provide the participants with the necessary personality, skills and projection
- **ACCOUNTING FOR NON-ACCOUNTANTS**
This course aims to provide supervisors, general staff and managers the basic principle in accounting and basic controls
- **CUSTOMS BROKERAGE FOR NON-BROKERS**
This course aims at providing the participants with the basic knowledge of customs brokerage at practice in the Philippines including the computation of tariffs, duties & taxes in general and the various entry lodge at the BOC

附錄七、香港貨運業協會有限公司報告資料

Hongkong Association of Freight Forwarding Agents Ltd. (HAFFA)

Country Report 2000-2001

Chairman's Report

Dear Fellow Members,

We experienced a very exciting year, as most of our Members have achieved record Airfreight Tonnage last year, helping Hong Kong become the busiest international air cargo hub in the world. Hong Kong's air cargo throughput in 2000 has shown a very impressive growth of up to a record breaking --2.3 million tonnes as per HK Airport Authority figures, representing an increase of 16% over 1999. Congratulations are also given to the Hong Kong port for a record year in 2000 --with an estimated container throughput of 17.8 million TEUs, representing an increase of 10% over 1999, thus securing Hong Kong's position as the world's number-one container port. We can be very proud of our leading role in the Freight Forwarding industry in the world.

In addition to that, I wish to highlight a few events that I think are molding and shaping our industry.

- 1) To assist the Hong Kong Government's policy on development of third party logistics sectors, Legislative councillor Ms Miriam Lau, Economic Services Bureau, Port and Maritime Board, Trade Development Council, HAFFA, Hong Kong Shippers Council, Hong Kong Productivity Council, Hong Kong Logistics Association met on different forums and brainstorming sessions to solicit views from the industry. The Committee endorsed the general views that Hong Kong should position itself as the preferred Asian hub for global logistics activities. We urge the government to work closely with China officials to improve the cross-border traffic flow, and take more immediate actions to help reduce the operating cost of agents at the airport through adjustment on terminal charge.
- 2) Another remarkable event is the proposed rebuild fee by the Cargo Terminal Operators. Through the lobbying efforts of our Committee, the HAFFA/ Customs/ CLG/HACTL/AAT/ working group has confirmed that if our Members could provide advance shipment data to the airlines, ie 4 hours prior to flight departure, this would help reduce the Customs physical examination. The general result of the survey was that the four hours rule did work well there was no rebuild or offload occurred in HACTL. Thanks to your support by responding to the HAFFA news, both cargo terminal operators have agreed to shelve the proposed rebuild fee for bulk cargo. As a result, both HACTL and AAT have officially shelved the proposed rebuilt fee for prepacked unit with a condition. You and your Association have done our part to reduce the operational cost to facilitate the clearance of our Airfreight shipments.
- 3) As we look into the future, the substantial downward adjustment in prices in the past few

years has made Hong Kong more competitive. With China's accession to the WTO, there will be a gradual phasing out of China government restrictions on distribution. HAFFA believes our Members will not be realistic to compete on costs alone, especially compared with low-cost services offered by neighbouring ports and airports like Shenzhen, Guangzhou and Shanghai. Member Forwarders have to be vigilant in providing efficient flow of Cargo in the supply chain and be IT capable in order to secure its competitive edge in the provision of higher value-added services.

- 4) After months of preparations, the Association's new headquarters was opened on 8th February this year with over 90 guests and experts from all sectors of the freight and logistics industry attending. Their participation did add much color and glory to the history of HAFFA. The office with boardroom and training room combined in one is now a reality and the new facilities are ready for Members to make use of.

With new facilities such as the Marine Cargo Terminal which has already been opened and the logistics centre to be built in CLK, 2001 will be another year where the government and us can further solidify the excellence of Hong Kong's transportation and logistics services.

Yours sincerely,

Edmond Chau
Chairman

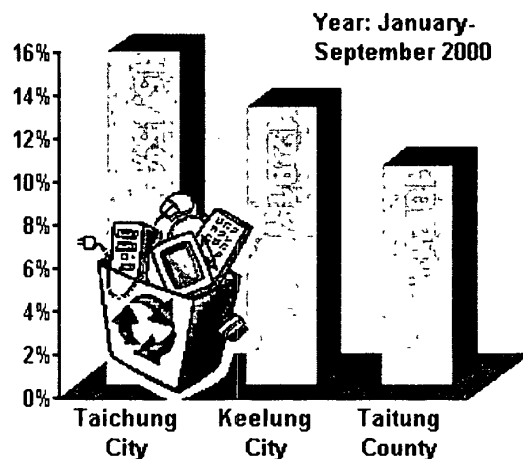
附錄八、台北市航空貨運承攬商業同業公會報告資料

COUNTRY REPORT 2000

2000 & 2001 Economic Forecast

by Samson Pao

Jan. 1, 2000



Note: Of the 6.4 million tones of garbage collected in the ROC between January and September 2000, 330,000 tones--or 5.2%--was recycled.

Source: Environmental Protection Administration, ROC

Earthquake-stricken Nan-tou County

Taiwan's Central Bank announced Thursday it will cut the two key interest rates for the first time in 22 months to meet growing liquidity demand in January 2001. The cuts take effect Friday.

The discount rate - the rate which the Central Bank charges on loans to commercial banks - will be cut to 4.625 percent per annum from 4.75 percent, while the rate for accommodation against secured loans will be lowered to five percent from 5.125 percent.

The Central Bank will also raise the required reserve ratio imposed on new foreign currency deposits to 10 percent from five percent, effective Friday.

The higher reserve requirement for foreign currency deposits comes after Taiwan's foreign currency deposits reached an all-time high of NT\$1.07 trillion at the end of November.

The announcement was made following the Central Bank's quarterly board meeting.

During the meeting, the central bank also decided to lower its M2 money supply growth target for 2001 to between five percent and 10 percent from the 6-11 percent target cited earlier this year

Lowering the M2 money supply target does not mean a tightening of the Central Bank's monetary policy, but rather an anticipation of a slowing economy, said Central Bank Governor Perng Fa-nan

Meanwhile, the Central Bank will supply enough liquidity ahead of the Chinese Lunar New Year for financial institutions via open-market operations, discount windows, and accommodation measures, Perng said

Lawmakers Thursday passed amendments to the Income Tax Law that will offer bigger tax breaks for wage earners filing their 2000 tax returns early next year

Under the revision, the amount of the special deduction for taxable salary income per taxpayer will be raised to NT\$75,000 from the current NT\$62,000. This will translate into a saving ranging from NT\$780 to NT\$5,200 in tax breaks per person, depending on each individual's income and taxation level

Meanwhile, each taxpayer can strike off an additional NT\$120,000 per year from his or her taxable income for residential housing rentals. This translates into anywhere from NT\$7,200 to NT\$48,000 in final tax breaks

Another amendment allows taxpayers over the age of 70 who file their own returns to receive 1.5 times the amount of their special tax-free deductibles, totaling NT\$111,000. Previously, only those aged over 70 who filed as dependents of their families or relatives were eligible for the same break

As a result of the amendments, the National Treasury stands to lose approximately NT\$8 billion in taxation income in 2001.

<http://www.taiwanheadlines.com/>

In the 1990s, macro-economic policies were adjusted to facilitate freer flow of goods, services, funds, human resources and information. Many substantial changes were made to laws and regulations. The openness of Taiwan's economy was demonstrated by two-way trade totaling US\$232 billion in 1999, 15th largest worldwide, while inward and outward FDI and portfolio investment also increased considerably. UPS and FedEx each inaugurated a West Pacific regional hub at the Chiang Kai-shek International Airport, making it the region's only airport with such facilities

To be integrated into the international system of open multilateral rules-based trade, Taiwan applied for admission to the GATT/WTO. Having concluded bilateral negotiations with 30 WTO members and completed adjustment of our economic system to comply in full with international norms, we stand poised for membership of that body in the very near future. In 1991, Taiwan joined the Asia Pacific Economic Cooperation (APEC) forum. As a member of APEC, we are tied in closely with the Asia-Pacific community, pursuing cooperation in economic, cultural, and social dimensions, and participating actively in governmental policy dialogue with the world's largest sub-regional grouping.

Retrospect

After the Asian financial turmoil the global economy gradually recovered in 1999 and picked up even more expansion speed in 2000. The U.S. economy sustained high growth with low unemployment rate in 2000, though inflation pressure is heating up from the crude oil hike. Japan economy improved by the government's stimulating policy and the rejuvenation of the semiconductor business. Private consumption and investment also showed signs of growth. In Euro area the economy sustained a stable growth and unemployment steadily declined, even though Euro reached a new low against the dollar. Asian countries enjoyed a buoyant growth due to rapid expansion in trade and surge in domestic demand.

Affected by the booming global economy and strong global demand for electronics and telecommunication products, domestic demand and production gradually elevated, and trade also expanded substantially. The real economic growth for the first-six months appeared extremely healthy. The growth exceeded 7.92% in the first quarter, representing the highest level since the second quarter of 1992. During the second quarter, private consumption did not grow as strong as expected due to the stock markets fluctuation triggered by the Nasdaq's downturn adjustment. As a result, the real economic growth slipped to 5.43% and 6.7% for the second quarter and the first half. In the third quarter, rising crude oil prices and investors' skepticism on electronics industry performance led to the slumping of the stock markets. In addition, the continued climbing non-performing ratio of the domestic financial institution indicated that financial sector did not perform as well as the real sector.

As mentioned above, Taiwan's trade expanded dramatically in 2000 on account of the global economic expansion and exuberant demand for electronics and telecommunication goods. From January to September, exports grew 25.5% from the same period of 1999. Imports grew by a even more 33.4%, thus causing trade surplus to shrink to US\$ 4.62 billion, or dropping 46.5% in comparison with the same period of 1999.

As for the domestic demand, owing to the optimism on semiconductors and photo electronics industries, the manufacturers have actively enlarged their production plants. Therefore private investment has improved from the 1999's negative growth of 0.68% to reach 23.0% during the first six months, representing one the factors that propped up Taiwan economic growth. Although private consumption sustained a considerable expansion, its growth was impacted by the slipping domestic stock market. As a result, the growth of private consumption has slowed down.

Furthermore, although the climbing crude oil prices raised costs on imports, domestic inflation appeared mild and consumer price index rose only by a slim margin of 1.1%. In labor markets the unemployment rate gradually rose on account of the Taiwan's industrial transition from traditional industry to high-tech industry and the consequent increasing in blue-collar unemployment. Overall, the unemployment rate averaged 2.8% during the six months of this year, still lower to that of 1999. The domestic misery index, which is equal to the sum of the inflation and unemployment rates, was 3.9% in the first half of 2000, representing the lowest in Asia. Variations in economic indicators in year 2000 are indicated in table 2-1.

Consumption

In the first half of 2000, due to active trading in the domestic stock market, the effect of the presidential election, the spread of mobile phone and Internet trend, private consumption peaked 7.65% during the first quarter and slowed down to 5.62% in the second quarter. Overall, private consumption grew 6.7% in the first half, higher than 5.4% of 1999.

The government consumption declined along with the termination of the special budget on military procurement. The growth rate was -6.17% and -9.51% during the first two quarters, representing six straight quarters with negative growth. The growth of government consumption dipped to -7.84% in the first six months of this year, lower than -6.49% of 1999.

Fixed Capital Formation

Although construction investment slowed down, the manufacturers of semiconductors and photo electronics actively expanded their plants. As a result, the growth rate of fixed capital formation reached 18.41% and 27.13% respectively in the first two quarters. Investment on machinery grew 40% while the overall investment increased by 23%.

Relative to private investment's high expansion, government investment declined 4.05% and 16.09% in the first two quarters due to the slow implementation of public projects and relative high base of last year. Investment from government and public enterprises declined 11.1% and 17.0% respectively in the first half, a poor performance quite contrast to that of 1999.

Trade

In the first half of 2000, Taiwan's trade expanded to a large extent. In terms of US dollar, commodity exports grew 18.36%, 27.58% and 30.20% respectively in the first three quarters, representing the best performance since 1988. As for regional distribution, from January to September, commodity exports to South Korea grew 60.7%, following by Japan's 44.1% and ASEAN's 32.2%. Exports to the USA and Europe also grew by 14.6% and 20.1% respectively.

Looking at the product structure, the machinery and electric equipment were the major export products, representing 54.9% of total exports. From January to September, export of machinery and electric equipment grew 32.6%. Among them, electronics, information and telecommunication products, which took up 20.8% and 13.2% of total exports, grew 50.4% and 35.0% respectively. Other product with wide margin growth was precision machinery like optics and cameras, measurement equipment, and medical apparatus, with growth surpassing 56.8%. As for exports of traditional products such as textiles, animal and vegetal products, leather and fur, and plywood also showed growths. Overall, from January to September, commodity export grew by 25.5% in comparison with the same period of 1999.

As for imports, booming domestic economy and increasing investment in the first half brought about a large import expansion. During the first three quarters, commodity imports grew 25.62%, 39.70% and 36.50% respectively. Taiwan's major imported goods were agricultural and raw materials, occupying 64.4% of the total imports. From January to September, agricultural and raw materials increased by 33.4% from that of 1999 in the same period. Import of capital equipment, which took up 27.9% of total imports, grew 44.5%. Import of consumption goods only took up 7.7

% of total imports. From January to September, the yearly growth reached 4.6%. It appeared that the increase in imports is mainly from production expansion instead of increase in consumer expenditure. From January to September imports jumped by 33.4% in comparison with that of 1999 in the same period.

Prices

In spite of buoyant economy in the first half, commodity prices did not rise significantly, mainly due to the improvement of the industrial productivity and sharpened competition. The market of real property was still at the trough, leaving less room for increasing rents. Stable food prices and reduced charges on telecommunication service also helped CPI down. Another factor was the appreciation of the NT dollar. Consumer price has increased by 1.14% during the first three quarters of this year in comparison with that of 1999. The core CPI, exclusive of fresh vegetable, fruit and fishery, grew merely 0.54%.

With the gradual climbing prices of the global agricultural and raw materials, wholesale price displayed a surging trend. Especially, crude oil price rose in accordance with the expansion of global economy and the turmoil in the Middle East. Crude oil price was over US\$ 37 per barrel at one time, but with the US pressure on OPEC members, prices started to drop slightly. From January to September, import price index grew by 5.08% from that of 1999 in the same period. In contrast, export price index dropped by 1.74% from that of 1999. Considering that WPI dropped 4.55% in 1999, the gain in 2000 did not return WPI to the level in 1998.

Financial Markets

In stock markets, the fact that Y2K crisis did not cause major troubles when coming into the new millennium and the electronic communication industry's outlook was considered as good boosted the weighted index to reach 10,161 points on February 19. The average of daily trading expanded to NT\$ 196.5 billion in February. Since then due to the outcome of the presidential election and the downturn of Nasdaq index, the benchmark TAIEX index was adjusted to 8,349 points on May 11, or daily turnover also shrunk to NT\$ 106.6 billion. Thereafter, the announcement of MSCI to increase Taiwan's weight in its global index has pushed TAIEX back to the 9,000 points temporarily. But new government's lack of direction in economic policy and the sinking U.S. stock prices again caused TAIEX to go down and trading to fall. In September the skepticism of investors on the performance of high-tech industry in the U.S. stock markets and the domestic political turmoil caused by the scrapping of the controversial Fourth Nuclear Power Plant led to another market downturn adjustment. Despite the active intervention of the stabilization funds designed to defend the stock market, the TAIEX continued to dive, falling 18.8% in September.

President Chen Shui-bian accepted former premier, Tang Fei's resignation on October 3 and on October 4, the ministry of finance urgently announced that the 7% floor limit of daily drops was cut to 3.5%. However, the stock market was not enthusiastic and on October 19, the index kept taking a dive to 5,081 points on a paltry turnover of NT\$ 37.7 billion.

In order to revive investors' confidence, the Executive Yuan on October 14, held a financial and economic conference and announced the Eight Stimulus Measures as the following

- 1 No tax hike during this term of presidency
- 2 Abolish current 2 percent business tax on financial institutions and defer loan payments for traditional industries by six months
- 3 NT\$ 450 billion preferential loan for traditional industries to be backed by a credit guarantee.
- 4 Bringing in foreign Asset Management Corporations to handle bad loans.
5. No water shortages, no electricity shortages.
- 6 Increase the industrial land development fund by NT\$ 30 billion from the current NT\$ 10 billion
- 7 Provide NT\$ 15 billion fund to help SME's upgrade manufacturing technology.
- 8 Improve the quality of labor in Taiwan and provide adequate labor supply

On October 19, the Ministry of finance announced a package of six new measures to help ease selling pressure. These include IPO's margin deposit percentage should increase to 120% from 90%

Floor limit of daily stock drops will be cut to 3.5% during 15 days trading session. Shares value below NT\$ 10 should temporary stop being trading on margin. Loosened the limit on foreign portfolio investment. In response to those measures and the rebounding of the U S stock markets, the TAIEX bounced back on October 25 and the index shot to 6,000 points, closing at 6,023 points on a turnover of NT\$107.9 billion

As for the exchange rate, due to the fast expansion of Taiwan economy, buoyant trading in stocks and sustained foreign capital inflow, the NT dollar appreciated in the first quarter. The average exchange rate against the dollar reached NT\$ 30.74, increasing about 1NT dollar from NT\$ 31.70 of 1999 in the fourth quarter. The NT dollar continued to appreciate against the dollar in the second quarter, the average exchange rate was NT\$ 30.68. But due to the stronger dollar, the gradual degeneration of Taiwan financial situation, the slowing down of foreign capital inflow and the accumulation of foreign currency savings, the NT dollar started to display a falling trend since the beginning of the third quarter. As a result, the exchange rate reached NT\$ 31.11 against the greenback. In October the stock market's poor performance and the Central Bank's let go in the foreign exchange market caused a deeper depreciation on the NT dollar. The exchange rate against the dollar dipped 0.62 to 31.92 on October 13, and closed at NT\$ 32.26 on October 17.

As for short-term interest rate, in spite of the domestic fast expansion pace, financial institutions appeared more conservative on granting new loans. In the light of stabilizing consumer price and recouping economic prosperity, the Central Bank implemented a loose monetary policy. In addition, increasing foreign capital inflow also helped domestic financial market to maintain a low interest environment. The average of overnight borrowing rate was 4.62% in the first quarter, lower from 4.78% of 1999. Subsequently, with the rise of the global interest rates, increasing non-performing loan ratio among domestic financial institutions, and poor stock market performance,

short-term interest rates went up gradually. The average of overnight borrowing rate during the second and third quarters were 4.74% and 4.78% respectively, still considered low.

Another key initiative is the Global Logistics Center Plan, launched in October this year. The basic aim of this plan is to capitalize on Taiwan's advantage in high-tech manufacturing, provide full digital and infrastructure support for the integrated flow of productive factors, and enable optimal supply-chain management so that our island can develop as a major international procurement and logistics base. Actions to be taken under this plan include measures to enhance the efficiency of goods transshipment, assistance with land acquisition, expanding the operational scope of the offshore shipping center, modifying the tax environment in line with international best practice, simplifying commodity inspection procedures, and cultivating needed manpower.

By implementing these and other plans, we will seek to write the next bright chapter of Taiwan's economic development. We will carry forward to a higher level the liberalization and globalization of our economy. We will strive to keep up with the fleetest of foot racing into the digital age. We will, most importantly, ensure that everyone on Taiwan can enjoy not only material prosperity but other good things in life as well, on an island where technology's benefits harmonize with a caring respect for the natural world and our place within it.

Taiwan companies pass orders to overseas manufacturers mainly out of five considerations: (1) cheaper production cost overseas, (2) request by customers, (3) availability of overseas subsidiaries, (4) domestic production cannot absorb all orders, and (5) domestic facility for the specific production no longer available. Among domestic manufacturing industry's orders fulfilled by overseas production, about 22% go to Japan, the U.S. and Europe, 41.5% go to Mainland China, and 32% go to Southeast Asia. The information electronics industry has a higher than average ratio, with 23.8% going to Japan, the U.S. and Europe, and 49% to Mainland China, and 25.5% to Southeast Asia. The electronics and electric machinery industry has a similar distribution.

Global Logistics and High-tech Industry

In the computer industry, global leaders such as Compaq and Dell have set up international procurement offices (IPO) to keep cost low and to secure market. In the past, big local players such as Acer, Tatung, Inventec and Mitac etc. would make a forecast for next year's OEM orders and will plan and produce ahead. The production then would be sent to global players in the U.S., Europe or Japan, which would take care of distribution, delivery, inventory and after-sale services. The trend toward IPO/BTO mode implies a change from traditional OEM/ODM operations of Taiwanese firms. Since the U.S. or Japanese companies will not give a procurement order to Taiwan until they secure such an order from distribution or retailing agency. Therefore, they shorten the supply chain and reduce inventory cost on their part and pass the job to the OEM/ODM producers. If a firm from Taiwan wants to win OEM orders from these big players, they have to also have strength in global logistics management. As a result, OEM orders mainly go to large companies such as Acer and Mitac. As for SMEs, they will have to work with these core firms to get orders.

In a BOT mode, the OEM firm will have an advantage to have a warehouse in the client-appointed place. Meanwhile, the distributor, upon receiving the order, will go directly to the production point or shipment warehouse to get the ordered products. With sound global logistic management empowered by logistics businesses such as FedEx and UPS, firms will gain significant competitive edge. Therefore, increasing overseas investment to build strong global network based on further horizontal and vertical division of labor is a must for most of Taiwan's high-tech industries.

The lengthening Value chain on Taiwan's part implies increased business risks as well as opportunities. Taiwan seems to be more or less ready in grabbing the opportunities. Besides a robust manufacturing base on the island and the progress made towards building the capacity of a 11 regional operations center, Taiwan has set up a large number of overseas production bases via increasing outward investment since the mid-1980s. Although the greatest concern of outward investment was to take advantage of low cost of labor and land in the host country, the availability of feasible support to global operations has been increasingly important.

In 1998, more than 71% of Taiwan companies which invested overseas had investment in Mainland China. And about 17% made investment in the U.S. The investor company has shown most preference to invest alone. (Ministry of Economic Affairs 1999). The investment is made mostly in cash. However, most SMEs have invested in the form of machinery equipment, raw materials, components, semi-finished products or finished products. While most parent companies have the functions of production, R&D, design, marketing and distribution, finance, planning, procurement, and services, the subsidiaries may only have the production department plus a finance and a marketing and distribution department. It is worth noting that there are already 30% of overseas subsidiaries that have R&D department. Currently, technology of subsidiaries is predominantly supplied by parent companies albeit in a declining trend. Whether the increasing R&D capability of overseas subsidiaries has any impact on Taiwan's domestic industries remains to be seen.

On Nov. 2000, According to my organization Mantraco, sole member of World Air cargo Organization, one of our local based TIFA-R member, (who declared 92% revenue share is Hi-tech products), their Customer Service department had reach on most of their customer, find out more than 87% of the manufacturers either they had China Setup or they are going to do so.

Outlook It appears that the global economy will have a fast expansion in 2000 and then slow down moderately in 2001. Based on IMF's global economic outlook report released in September, the global economic growth is expected to attain 4.7 % in 2000 and 4.2 % in 2001. In addition, the growth on global trade volume could fall from 10% of 2000 to 7.8% in 2001. Under this scenario, Taiwan's foreign trade is expected to grow significantly this year and slow down moderately in 2001. Nevertheless, the speed of export growth is expected to be faster than import growth, thus enlarging trade surplus in 2001. With the private investment flowing into electronic communications, the manufacturers continue to broaden their plants, year 2000 will enjoy great growth in comparison with negative growth of 1999. Overall, TIER, Taiwan Institute of Economic Research estimates the domestic economic growth would sustain at 6.37 % level. It would drop to 6.01% in 2001. (table 2-1) The prospect of economic outlook are as follows.

Consumption Affected by the poor performance of the stock markets, the private consumption growth has slowed during the fourth quarter, and the annual growth is forecasted at 6.28%. With the slowing economy, increasing unemployment rate, private spending growth will fall. But civil servants and teachers are expected to see their salaries and wages increasing by 3%, driving up salaries and wages in the private sector. The stock market is estimated to rebound after the downturn adjustment, and private consumption growth ratio could be kept at 6.10% in 2001.

As for the government's expenditure, prompt implementation of the budget at the end of fiscal year would bring back the government's expenditure to grow at 6.88% in the fourth quarter, and the annual expenditure growth is estimated at -0.82%. Due to the scrapping of 2% bank's business tax, the government's tax revenue will fall, as a result, its expenditure will be bounded as well, and the growth rate is expected to grow by a slim margin of 0.14%.

Investment Due to the sustained enlargement of the semiconductors and photo electronic plants by the manufacturers, it is expected that the private investment will sustain growths, reaching 16.84% in 2000. With the development of private electronic businesses and fixed Internet market, investment in the machinery will remain buoyant. Construction investment would increase as the high-speed railway and large shopping centers are now undertaken along with government's stimulating package. It is estimated that private investment growth will reach 7.36% by 2001.

The reconstruction of regions hit by the 921 earthquake is believed to quicken and the government's investment growth will reach 1.20% this year and slightly surge to 2.72% in the upcoming year.

International trade In spite of the gradual slowing down of the global economy, with the strong competitiveness of domestic electronic products, commodity exports would sustain 23.23% growth in 2001, but may drop to 7.55 % by 2001. With the slowing of the domestic economy and consequent machinery demand, growth of commodity imports in 2001 is expected to decline in comparison with that of this year. However, when Taiwan joins the WTO, lower tariffs and other liberalization policy will boost imports that could grow by 29.93% this year and fall to 6.58% by 2001.

As for service trade, Taiwan are in the deficit. With prompt rebuilding of the regions destroyed by the quake, tourism in those areas is expected to improve in 2001 and help ameliorate service trade deficit.

Overall, real export growth (including commodity and service) will reach 18.47% and 7.30% in 2000 and 2001. Real import growth will attain 17.69% and 5.97% in 2000 and 2001 respectively.

Prices The wholesale prices will climb as the prices of energy, agricultural and raw materials are growing along with the global prosperity. The expected depreciation of the NT dollar during the fourth quarter will also add pressure on wholesale prices. The annual growth rate of wholesale price index is anticipated to stand at 1.92% this year and 2.22% by 2001.

Regarding consumer prices, although consumers were affected by the rising of gasoline prices, increasing charges for tuition, and higher prices of vegetable and fruit, rent continue to be flat and fee of telecommunication has been reducing. As a result, consumer price index will only increase 1.31% in 2000 and 2.05% by 2001.

Financial Markets

A strong dollar and poor domestic stock market performance will have a negative impact on the NT dollar. It is, therefore, expected that the NT dollar will continue to depreciate against the dollar. However, under the stability policy of the central bank, the degree of depreciation should be limited. The average exchange rate of the NT dollar against the US dollar is expected to reach 31.80 in the fourth quarter and 30.83 for the whole year. In 2001, slowing U.S. economy is going to make dollar weaker so that the NT dollar will appreciate gradually. The average exchange rate of the NT dollar against dollar is expected to reach 31.63 by 2001 (this is government forecast, but the market forecast is reach to NT\$35.00=1US\$).

As for interest rate, due to the increase of money demand in the fourth quarter, pressure has raised on short-term interest rate, but the central bank's loose monetary policy will keep the interest rate steady. The average of overnight borrowing rate is estimated at 4.76% in 2000 and will reach 4.81% in 2001.

(6) Future uncertainty

As for the global economy, the U.S. economy appears slowing down, but the job markets continued to be buoyant. In addition, crude-oil price hike continues to raise inflation pressure. If the Fed raise the interest rate again to curtail inflation, then this could force the US economy toward a harder landing and in turn hurt the global economy.

Moreover, crude oil is a pending problem that constitutes a threat for the global economy. If the crude oil prices are kept above US\$ 30 per barrel, this will affect the global economy.

The cloudier prospect of high-tech industry is also a threat. But if foreign big manufacturer release order to domestic firms to cut down costs, this will be beneficial to domestic hi-tech industry.

There are some domestic factors that might have an impact on the domestic growth. There are as follows: cross-strait relations, domestic political instability, and the pace of financial reform, etc. If the government could cautiously handle cross-strait relations, bring all domestic political parties in the right track and succeed in financial reforms, undoubtedly, it would greatly help Taiwan's economy.

Forecast on Taiwan Macroeconomic Indicators

Items	unit	1999	2000	2001
		actual	estimated	forecast
GDP	%	5.42	6.37	6.01
Private Expenditure	%	5.37	6.28	6.10
Government Expenditure	%	-6.49	-0.82	0.14
Fixed Capital Formation	%	1.78	10.24	6.51
Government	%	3.64	1.20	2.72
Public Enterprises	%	13.28	-7.83	9.30
Non-government Department	%	-0.68	16.84	7.36
Exports (Goods&Labor services)	%	11.90	18.47	7.30
Imports (Goods & Labor services)	%	4.41	17.69	5.97
Goods Export (US\$)*	%	9.96	23.23	7.55
Goods Imports (US\$)*	%	5.76	29.93	6.58
Trade deficit*(US\$ Billion)		10.90	6.40	8.16
Commodity Price Index	%	0.18	1.31	2.05
Wholesale Price Index	%	-4.55	1.92	2.22
Exchange Rate (average)	NT\$/US\$	32.27	30.83	31.63
Overnight Borrowing Rate (average)	%	4.78	4.76	4.81

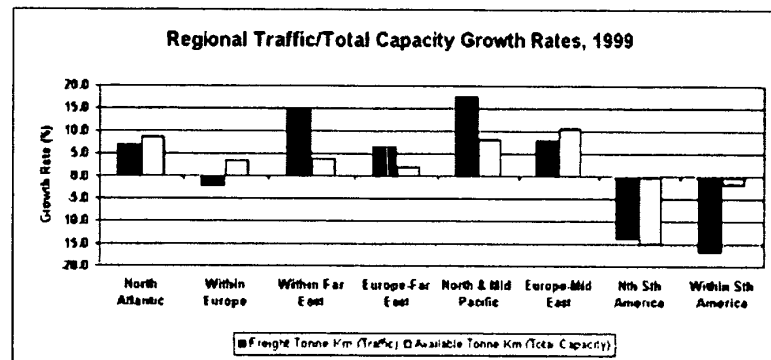
Note: Above figures are from customs

Source: Taiwan Institute of Economic Research Forecast

Air Cargo Marketing

Air Cargo Annual is vital reference document for airline managers, cargo agents, planners, statisticians, forecasters and analysts - in fact, anybody interested in the air cargo industry who needs answers to questions such as .

- What was the scale of growth in the air cargo market during 1999?
- Where was this growth strongest and weakest ?
- Where were the largest air cargo markets ?
- What was the impact of growth trends on yields and operating efficiencies ?
- What volume of cargo was handled by the world's Top 50 airlines and airports ?



What Does Air Cargo Annual Contain?

The latest edition contains an even more in-depth analysis of developments in the world air cargo industry. Key features include

■ A Global Overview Of Air Cargo Market Trends In The 1990s

Freight Tonne Kilometre, Available Tonne Kilometre, Weight Load Factor Trends

■ Regional Market Analysis

North Atlantic, Within Europe, Within Far East, Europe-Far East, North & Mid-Pacific, Europe-Middle East, North America-South America and Within South America

■ Top Freight Airlines in 1999

Ranking of IATA member airlines by freight tonnes carried, freight tonne kilometres and weight load factors on all-cargo operations

■ Top 50 Airports for Freight Tonnage in 1999 (NEW)

■ Individual Country Analysis

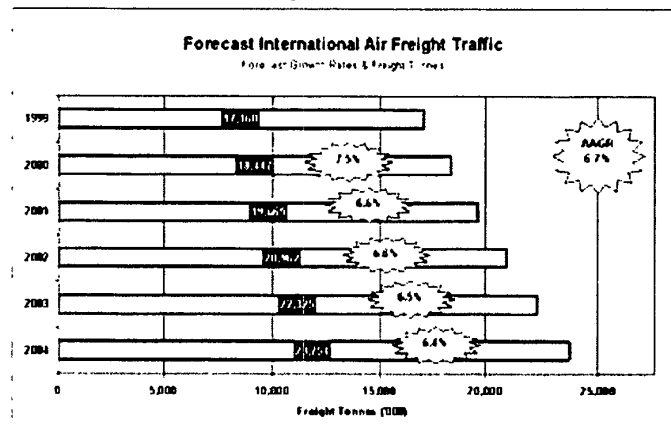
Over 100 pages of Air Cargo Annual are devoted to the compilation of unique Cargo Account Settlement System (CASS) data. This data is aggregated to provide in-depth analysis (i.e., regional trade breakdown, Top 30 country and city pairs, top 5 origin cities, airlines and agents, average yields, weight scale trends, seasonality) for the following 24 key cargo markets: Australia - Belgium - Canada - Costa Rica - Denmark - France - Germany - Great Britain - Greece - Ireland - Italy - Korea (Republic of) - Mexico - Netherlands - New Zealand - Norway - Panama (NEW) - Philippines - Portugal - Spain - Sweden - Switzerland - Turkey - United States of America .

FREIGHT FORECAST 2000-2004

IATA's latest annual Freight Forecast, covering the period 2000-2004, shows greatly increased

optimism about market prospects following two years of caution. This air of confidence can be directly linked to a much improved world economic climate

The result is a predicted Annual Average Growth Rate (AAGR) for total scheduled international traffic of 6.7% - up by 1.2% from last year's forecast and up 1.4% on the 1998-2002 forecast. The latest growth projections indicate that the volume of international air freight will rise by 6.6 million tonnes during the five year forecast period to a 2004 level of 23.8 million tonnes



Source: IATA's Annual Freight Forecast 2000-2004

The Freight Forecast 2000-2004 is derived from IATA's annual survey of the world's major airlines, airports and civil aviation authorities. The report represents the consensus opinion of the air freight industry's leading forecasting and strategic planning experts and provides informed commentary on the current and future development of the global air freight market.

The Freight Forecast 2000-2004 is a vital planning and resource allocation tool for managers, researchers, analysts, statisticians, forecasters, planners and marketing executives in the air freight industry and associated fields.

This report is available in printed format for USD 460 (USD 345 for IATA Member Airlines). The Freight Forecast is also available from the web for USD 470 (USD 350 for IATA member Airlines and Partnership Programme Members). The web version contains the full text of the book in Adobe Acrobat and the Forecast Tables come in Excel to facilitate your analysis of future trends in air freight traffic growth.

Physical Air Cargo 2000

Cargo Terminal	Import	Export	Transit	Express Export	Express Import	OBC Area	Total
TACT	307,852,591	238,805,980	86,384,916	12,593,107	15,052,459	5,867,144	666,556,197
ECT	61,115,065	184,841,152					245,956,217
GFT	84,726,730	169,013,528					253,740,258
FedEx					5,151,920	10,714,088	15,866,008
UPS			2,878,150		2,649,884	8,487,120	14,015,154
TACT (K H)	38,701,202	56,260,122	268,918	61,052			95,291,294
Year 2000 Total	492,395,588	648,920,782	89,531,984	12,654,159	22,854,263	25,068,352	1,291,425,128
Year 1999	415,155,488	606,318,686	78,549,713	14,668,642	10,726,887	4,283,641	1,129,703,057
Ratio	18.61%	7.03%	13.98%	-13.73%	113.06%	485.21%	14.32%

Reference with the Report from the CKS airport authorities of CCAA/ROC, the total Airfreight on Import is 492,395,588 against the 415,155,488 on 1999, there is a increasing of 18.61% on normal cargo, 648,920,782 kilo of 2000 on export against 606,318,686 of 1999, there is a increasing of 7.03%. For express shipment total increased 113.06% on Import. Decreasing of 13.73% on express export only because the customs formalities not meet market requirement.

