

主席报告

Chairman's Statement



香港与广东省，特别是珠江三角洲地区，在社会、文化和经济方面的联系一直密不可分。时至今日，港商在广东开设的公司已超过8万家，而香港在省内的累计实际直接投资额亦已超过1,000亿美元(8,194亿元人民币)，两地的密切关系由此可见一斑。

为了进一步发展和加强香港与珠三角的关系，大珠三角商务委员会于2004年3月成立，以民间机构的身分推动粤港合作，与香港特别行政区政府和广东省政府的工作相辅相成。

这是商务委员会的第二份年报。作为商务委员会的主席，能够在此与大家分享委员会对拓展和深化粤港合作的愿景，实在深感荣幸。

在首届任期内，商务委员会除在促进粤港经贸关系方面取得实质进展外，亦积极探讨一些与两地可持续发展有关的事宜。

Hong Kong has always had unbreakable ties with Guangdong Province, particularly the Pearl River Delta region (PRD), be it social, cultural or economic. These ties are evident today with over 80,000 Hong Kong owned companies operating in Guangdong and the cumulative actual direct investment in the Province from Hong Kong exceeding US\$100 billion (RMB 819.4 billion).

To further develop and strengthen Hong Kong's relationship with the region, the Greater Pearl River Delta Business Council was formed in March 2004 and serves as a private sector initiative working alongside the Governments of the Hong Kong Special Administrative Region (HKSAR) and Guangdong Province.

This is the second annual report of the Business Council and as its Chairman, I am greatly honoured to share with you our vision for broadening and deepening the cooperation between Hong Kong and Guangdong.

In its first term, the Business Council has attained considerable success with regard to the further enhancement of economic and trade interactions between Guangdong and Hong Kong. In addition, the Business Council has also actively pursued sustainable development issues which obviously affect both sides of the boundary.



新的区域融合

区域经济一体化已成全球趋势。世界各地均涌现不同形式的区域协作，藉以增强地区的竞争力。国家自七十年代后期起推行经济改革，不但把珠三角发展为主要的全球生产中心，同时通过贸易、投资及其他联系，使珠三角与国际逐步接轨。在这个转变过程中，香港积极参与，大力推动，在经济上也因而与珠三角日趋融合。

两地融合促使珠三角扩大而成为大珠三角。在过去二十多年内，大珠三角(包括香港特区和澳门特区)取得骄人的发展，现已成为国家内其中一个最富裕、增长最迅速的地区，也是一个极具吸引力的市场。

不过，大珠三角雄厚的经济影响力并不限于广东省，还逐步扩展至邻近11个省区。这11个省区组成的“泛珠三角”区域，成员包括广东、广西、湖南、海南、云南、贵州、江西、福建和四川九个省区，及香港和澳门两个特区。整个地区占全国面积的五分之一，全国人口的三分之一以上，生产总值合共达到8,795亿美元(72,066亿元人民币)。泛珠三角区域内各经济体系的互补性很强，集合起来就成为竞争力强劲又积极进取的经济实体。

由珠三角到大珠三角，再发展到现在的泛珠三角，清楚显示地区一体化以至全球一体化已是大势所趋。在《内地与香港关于建立更紧密经贸关系的安排》(CEPA)下，内地持续开放，加上国家加入世界贸易组织的相关改革，势必促使泛珠三角内部进一步扩大贸易和投资，加速区域融合。我们深信这个融合的趋势将会持续。

The New Integration

Regional economic integration has become a global trend. Various forms of regional collaboration that aim at enhancing regional competitiveness exist in different parts of the world. In China, economic reforms started in the late 1970's have not only transformed the PRD into a major global manufacturing hub, but have also brought it closer to the rest of the world through trade, investment and other forms of contact. Hong Kong actively participated and played a lead role in that transformation and its economy has, in the process, become increasingly integrated with the PRD.

The result of this integration has spurred the enlargement of the PRD into the Greater PRD. The development of the Greater PRD (GPRD), including Hong Kong SAR and Macao SAR, during the past 25 years or more has been remarkable by any standard. The GPRD has become one of the most affluent and fastest growing regions in China and an enormously attractive market.

Yet, the economic power of the GPRD is such that it is not just confined to Guangdong Province, it is progressively extended to eleven neighbouring provinces/regions. They make up what is now known as the Pan-PRD region that covers Guangdong, Guangxi, Hunan, Hainan, Yunnan, Guizhou, Jiangxi, Fujian and Sichuan, as well as Hong Kong SAR and Macao SAR. The region makes up one-fifth of China's landmass, contains more than one-third of its population and has a combined GDP of US\$ 879.5 billion (RMB 7206.6 billion). There is strong complementarity between these economies. As a single economic entity, it is highly competitive and very progressive.

From the PRD to the GPRD and now the Pan-PRD, we can see that regionalisation and globalisation are growing trends. Ongoing liberalisation under the Closer Economic Partnership Arrangement (CEPA) between Hong Kong SAR and the Mainland, together with reforms related to China's World Trade Organisation accession, will spur further expansion in trade and investment within the Pan-PRD, as well as accelerate integration within the region. Further, we are convinced that the momentum of this integration will continue.

在珠三角、大珠三角及泛珠三角组成的经济同心圈中，香港与珠三角不断融合，成为泛珠三角区域合作的核心。香港与珠三角优势互补，亦带动区内经济强劲增长。

香港和珠三角日后可在多方面推动泛珠三角区域的发展。香港会继续成为区内主要的金融中心、物流中心、贸易枢纽和服务出口中心。香港的主要优势在于具备高效率的服务平台，服务范围现已遍及整个地区。此外，香港亦已发展为日益重要的人才培训基地，为国家开发人才资源，使内地的经济能再闯高峯。本港八间大学和高等教育院校的学术成就举世认同，在这方面发挥了重要作用。另一方面，随着国际工业和服务业翘楚建立紧密的经济群组，加上中小型企业区内积极生产，使珠三角成为全球其中一个主要的制造业基地，并能够灵活适应多变的市场状况。

近年，珠三角与泛珠三角的关系无疑正不断加强。而由于香港与珠三角关系密切，珠三角今后的发展将会对香港带来深远的影响。

The PRD, GPRD and Pan-PRD represent a set of concentric circles. There is no doubt that the core of Pan-PRD regional cooperation is Hong Kong's on-going integration with the PRD. The complementary strengths of Hong Kong and the PRD have combined to produce substantial growth.

The future contributions of Hong Kong and the PRD in the Pan-PRD region's development will be numerous. Hong Kong will continue to serve as the region's de facto financial centre, logistics centre, trading hub, and service-exporting centre. At Hong Kong's core is its highly efficient services platform from which the whole region now benefits. Furthermore, Hong Kong is playing an increasingly important role as a nurturing and training ground for developing human resources that China needs in order to advance to the next level of economic prosperity. At the heart of this is Hong Kong's eight universities and institutions of high learning which has achieved world recognition. On the other hand, with interlocking clusters of internationally successful industries and services, and the active participation of small and medium enterprises, the PRD displays great flexibility in meeting changing market conditions as one of the world's leading manufacturing bases.

The relationship between the two regions has undoubtedly been strengthened in recent years. Yet, due to the close ties between Hong Kong and the PRD, the region's future development will have far-reaching impact on Hong Kong.





未来的挑战和机遇

广东的最新发展

过去五年，广东推动产业结构转型，致力发展重工业及高增值产业，预期在未来五年，省内的电子资讯、石化及汽车等产业将会急速发展。此外，省内的服务业亦出现强劲增长，而广东已在“十一五”规划中明言将于2006至2010年间加快服务业的发展步伐。另一方面，珠三角西部发展迅速，亦会促使省内部分产业迁往该处。

广东的产业结构转型和珠三角西部的高速发展定会为香港带来新的机遇。有鉴于此，商务委员会成立了两个专责小组，探讨这两项发展为香港商界带来的机遇和挑战，以及评估对香港企业及投资者可能产生的影响。两项研究的概要载于下面的章节。

邻近城市的迅速发展

面对不少内地城市(尤其是珠三角城市)的迅速发展，香港正面对种种重大机遇和挑战。举例来说，正如广东的“十一五”规划所提出，很多珠三角城市将会加紧建设港口与道路。因此，我们或需因应珠三角这种急速的发展，重新审视本港作为地区物流枢纽的领导地位。

此外，最近社会舆论谈到珠三角城市的高速发展会否引致香港被边缘化的问题。香港必须密切留意整个地区可能出现的变化，并采取周全的措施，以维持本身的竞争力。

Challenges and Opportunities Ahead

New developments in Guangdong

In the last five years, Guangdong has geared its industrial structure towards heavy and higher value-added industries. Among these, electronic information, petrochemicals and automobile industries are expected to expand significantly over the next five years. Meanwhile, the services sector in Guangdong has witnessed rapid growth as well. As stipulated in Guangdong's 11th Five-Year Plan, the province will expedite the development of its services sector during 2006 to 2010. In addition, the rapid development of the PRD's western region may prompt the re-location of some of Guangdong's industries.

Industrial restructuring in Guangdong and the rapid development of the PRD's western region are bound to bring about new opportunities to Hong Kong. In view of this, the Business Council established two task groups to explore the related prospects and challenges for Hong Kong's business community and to assess the possible impact on Hong Kong enterprises and investors. The summaries of the two studies are featured in later chapters.

Swift development of neighbouring cities

In the face of the swift development of many Mainland cities, particularly those in the PRD, Hong Kong is indeed facing a number of critical opportunities and challenges. For instance, as stipulated in Guangdong's 11th Five-Year Plan, many PRD cities will step up the development of their infrastructure for ports and roads. Hong Kong's leading position as a regional logistics hub may have to be reexamined in light of such rapid progress in the PRD.

Moreover, there have been recent discussions in the society on whether Hong Kong is being marginalised as a result of the quick advances made by PRD cities. It is imperative for Hong Kong to be alert to all possible changes that are taking place in the whole region and to take thoughtful measures to sustain its competitiveness.

有何对策？

首先，香港必须强化本身的竞争优势，巩固支柱产业，包括金融服务、贸易、物流、工商业支援服务和旅游业。香港是一个国际贸易金融中心，服务行业发展完善，很多内地及跨国企业均选择在此设立地区总部。再者，香港可以善用本身国际化及高度自治的优势，与大珠三角及泛珠三角的企业紧密合作，协助他们走向世界市场。

香港要巩固和维持长远的竞争力，就必须在主要的支柱产业保持领导地位。不过，香港的竞争力很大程度上取决于人才。容许更多的人才自由进出香港会提升我们的竞争力、吸引更多资金和创造更多就业机会。香港必须致力发展完善的通识教育、提供优质的高等教育，以及发展成为全球领先的研究中心之一。专才、企业家、学生或游客汇聚香港后，自然会产生互动交流，激发创意，令香港受惠。

与此同时，香港的基建发展务须与泛珠三角互相配合。加强在基建规划上的协调，有助加强香港与邻近省区公路和铁路网络对接，对于提高效率起重要作用。港珠澳大桥若能早日落成，当可在这方面发挥极其重要的作用。

最后我要指出，香港要维持竞争力，另一个关键是必须确保在珠三角、广东及更辽阔的腹地，发挥香港的优势和作用。泛珠三角区域合作有助拓展本港的发展空间。通过加强香港与邻近省区的合作，一方面可加快泛珠三角区内的人流、货流和资金流动，更可吸引更多海外资金、技术、管理专才与其他人才流入，巩固这个区域作为二十一世纪全国以至全球最蓬勃经济中心之一的地位。

What Should be Done?

First, Hong Kong must reinforce its competitive advantages and consolidate its core industries including financial services, trading, logistics, producer services and tourism. Hong Kong's status as an international trade and finance centre, with a well-developed services industry, make it a popular venue as the regional headquarters for both Chinese and multinational enterprises. Moreover, with its strengths of internationalisation and high degree of autonomy, Hong Kong can work closely with enterprises in the GPRD as well as the Pan-PRD region, and help them to embrace the world market.

It is crucial for Hong Kong to consolidate its leading position in key pillar industries so as to strengthen and sustain its long-term competitiveness. However, ultimately Hong Kong's competitiveness rests very much on its people. Allowing a larger pool of talent to freely flow through Hong Kong will increase Hong Kong's competitiveness, attract more capital and create more jobs. Hong Kong must strive hard to excel in general education, provide the very best in higher learning and grow to be one of the world's leading centres for research. By becoming a melting pot for professionals, entrepreneurs, students or visitors, Hong Kong can gain substantially from creativity and innovation that such interactions provide.

At the same time, it is vital for Hong Kong to dovetail its infrastructure development with that of the Pan-PRD region. Through enhanced coordination of infrastructure planning, greater efficiency will be realised by interconnecting Hong Kong's highways and railway networks with those in neighbouring provinces/regions. In this regard, the early completion of the Hong Kong-Zhuhai-Macao bridge will be of paramount importance.

Last but not least, the key to sustaining Hong Kong's competitiveness also lies in ensuring our value, not just to the PRD or Guangdong, but to a much larger hinterland. To this end, Pan-PRD regional cooperation will help broaden our reach. Through increased cooperation between Hong Kong and neighbouring provinces/regions, the Pan-PRD region will be able to speed up the flow of people, cargo and capital, while attracting more foreign capital, technology, management and talent, to reinforce the status of this region as one of the most dynamic economic centres of China and the world in the 21st century.

总结

香港是珠三角的长期伙伴，可以促进区内的经济增长和发展，并因而从中大大得益。为了让这个伙伴关系不断发展，惠及两地，长远的计划及协调工作必不可少。此外，我们须留意其他地区性问题，积极协作，谋求解决。就以污染问题为例，空气质素每况愈下，不仅影响区内市民的健康和生活质素，亦有损大珠三角对海外投资者和旅客的吸引力。因此，粤港政府和民间机构必须携手合作，采取前瞻性的措施，改善两地空气质素。我们必须紧记，地区融合并非单为了经济利益和回报，也是为了达成一致目标和共同分担责任。

区域合作是长期工作。我们必须努力不懈，开拓新的合作领域，并且抓紧每个契机，方可取得实质成果。我身为商务委员会的主席，定会与全体委员紧密合作，寻求更多途径，进一步拓展区域合作的空间。

鸣谢

我谨代表商务委员会，衷心感谢各位委员与事务主任尽心竭力为商务委员会服务；他们高瞻远瞩，见解精辟，并且不吝分享经验，使委员获益良多。我也要感谢秘书处人员不辞劳苦，对商务委员会的工作贡献良多。最后，我要感谢粤港两地政府，以及中国国际贸易促进委员会广东省分会鼎力支持商务委员会的工作，促进粤港两地的经贸合作。



大珠三角商务委员会主席
冯国经
二零零六年六月

Concluding Views

As the PRD's lifelong partner, Hong Kong has the ability to facilitate the region's growth and development, and will gain significantly as a result. In order for this partnership to grow and benefit both partners, long-term planning and coordination are indispensable. In addition, we should be mindful of other region-wide issues such as the problem of pollution and proactively contribute to solving them. The deterioration of air quality in particular threatens not only people's health and quality of life, but also the region's attractiveness to international business and tourists. Hence, there must be concerted effort between governments of both sides and the private sector to take forward-looking measures that can improve our air quality. After all, integration is not just about economic benefits and gains. It is about the sharing of a common vision and the sharing of responsibilities as well.

Regional cooperation is a long-term mission, and concrete results have to be achieved through continuous efforts to explore new areas for cooperation, and to take advantage of every opportunity. As the Chairman of the GPRD Business Council, I will work closely with fellow members to look for more ways to further expand the scope for regional cooperation.

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