

H O N G K O N G

香港

大珠三角商务委员会  
The Greater Pearl River Delta  
Business Council



2005 / 2006

年报 Annual Report



# 大珠三角商务委员会

## The Greater Pearl River Delta Business Council

香港特别行政区行政长官

曾荫权先生

曾先生：

本人谨代表大珠三角商务委员会各委员呈交商务委员会的2005/2006年报。

随着香港的私营机构紧密参与广东的经济发展，商务委员会一直致力担当粤港两地民间机构的重要沟通桥梁，促进双方商讨粤港合作的事宜，并向两地政府反映意见。

商务委员会自2004年成立后，已取得一定的成绩，去年继续再接再厉，集中研究有关大珠三角发展的主要事宜，包括便利跨境人流物流、吸引粤企来港、推动可持续发展，以及加强其他范畴的合作等。

**跨境人流物流：**跨境人流物流工作小组提出的主要建议包括：

- 为跨境货运业提供更灵活的安排，如放宽"一车一司机"的规定(内地已于2005年9月28日落实放宽措施)；
- 延长持有沙头角及文锦渡管制站封闭道路通行许可证的私家车于晚间使用落马洲／皇岗管制站过境的时间；以及
- 长远来说，在莲塘兴建新的陆路口岸。

**吸引粤企来港：**联合投资贸易推广工作小组与粤方小组合办宣讲会和考察团，向有意"走出去"的粤企介绍香港的营商环境。工作小组又探讨如何向在港粤企加强支援服务。

**可持续发展：**2005年11月，可持续发展工作小组与中国国际贸易促进委员会(贸促会)广东省分会、广东省环保产业协会，以及香港商界环保大联盟合力推出《清新空气约章》，推动粤港两地商界自发采取环保措施。

**旅游及文化：**旅游、文化及体育工作小组向两地政府提出有需要减低旅客顺道访港的多程签证费用，并建议准许持有效澳门通行证的内地旅客顺道来港旅游。

**落实CEPA：**落实CEPA服务业合作工作小组探讨专业界别进入内地市场所遇到的困难，并提出推动落实CEPA的建议。工作小组又合办座谈会，以讨论香港专业界别进入广东市场的机会和途径。

**科技、教育及人才培训：**科技、教育及人才资源工作小组研究把教育服务纳入CEPA，并考虑了多项与科技及人才培训有关的措施。

除此之外，商务委员会又进行两项研究，探讨今后与广东合作的方向，希望能把握广东日后发展所带来的机遇。

**广东省产业结构转型为香港带来的机遇和挑战：**广东的经济结构近年出现主要转型，重点发展重工业和服务业。在"十一五"规划下，这个发展趋势将会持续，并对香港带来重大影响。本港商界必须提升技术水平和改革经营模式，以配合广东的最新发展。我们亦希望两地政府可在基建和体制上提供所需的支援，协助私营机构适应转变。

**珠三角西部的发展及其与香港的合作前景：**珠三角西部城市拥有深厚潜力，广东省政府亦对发展西部甚表支持。为了协助商界到当地发掘商机，粤港政府应加快发展基建，促进人流物流，同时加强推动两地的商业交流和发展。

商务委员会在推行工作期间，一直与两地政府、广东省贸促会及其辖下的小组保持良好的沟通。我们在未来会继续加强这些工作联系。

衷心希望你继续支持商务委员会的工作。



大珠三角商务委员会主席  
冯国经  
二零零六年七月三十一日

# 大珠三角商务委员会

## The Greater Pearl River Delta Business Council

The Honourable Donald Tsang  
The Chief Executive of  
the Hong Kong Special Administrative Region

31 July, 2006

Dear Mr Tsang,

On behalf of members of the Greater Pearl River Delta Business Council, I am honoured to convey to you our Annual Report on the work of the Business Council in the year 2005/2006.

With the close involvement of the Hong Kong private sector in the economic development of Guangdong, the Business Council has served as an important platform for the private sector to discuss issues related to Hong Kong/Guangdong cooperation and channel their views to the two governments.

Building on the foundation established since 2004, the Business Council continued in the past year to focus on key issues relevant to the development of the Greater Pearl River Delta region. These include facilitating cross-boundary people and cargo flow, attracting Guangdong enterprises to Hong Kong, promoting sustainable development and enhancing cooperation in other areas.

**Cross-boundary people and cargo flow:** key issues advocated by the Cross-boundary People and Cargo Flow Sub-group include:

- enhancing flexibility for the cross-boundary cargo industry such as relaxation of the "one-truck-one-driver" requirement (which was relaxed by the Mainland authorities from 28 September 2005);
- extending the arrangements for private cars with Closed Road Permits of Sha Tau Kok or Man Kam To Control Point to use Lok Ma Chau/Huanggang Control Point during night time; and
- in the longer run, establish a new land boundary crossing point at Liantang.

**Attracting Guangdong enterprises to Hong Kong :** the Joint Investment and Trade Promotion Sub-group and its Guangdong counterpart have joined hands to organise seminar and visit to introduce Hong Kong to Guangdong enterprises interested in "going out". The Sub-group has also considered ways to strengthen support services for Guangdong enterprises operating in Hong Kong.

**Sustainable development :** to promote voluntary environmental protection in the business sectors in Hong Kong and Guangdong, the Sustainable Development Sub-group has joined hands with the China Council for the Promotion of International Trade (CCPIT) Guangdong Sub-Council, the Guangdong Environmental Protection Industries Association and the Hong Kong Business Coalition on the Environment to launch the Clean Air Charter in November 2005.

**Tourism and culture :** the Tourism, Culture and Sports Sub-group has brought to the attention of Hong Kong and Guangdong governments the need to reduce the cost of multiple visas for visitors making side trips to Hong Kong, and the suggestion for Mainland visitors holding valid Macao permits to be allowed to visit Hong Kong in the same trip.

**Implementation of CEPA :** the Services - Implementation of CEPA Sub-group has identified difficulties encountered by the professional sectors in accessing the Mainland market, and has tendered recommendations to promote the implementation of CEPA. The Sub-group also co-hosted a seminar to discuss the opportunities for the Hong Kong professional sectors to enter the Guangdong market and the avenues available.

**Technology, education and manpower training :** the Technology, Education and Human Resources Sub-group has looked into the inclusion of education services in CEPA, and considered a number of initiatives relating to cooperation in technology and manpower training.

Apart from the work of the Sub-groups, the Business Council has also initiated two studies on the future direction of cooperation with Guangdong, with a view to grasping the opportunities arising from the Province's future development.

**Guangdong's Economic Restructuring - opportunities and challenges for Hong Kong :** we note that Guangdong has been undergoing major economic restructuring in recent years, putting particular emphasis on heavy industry and services industry. Such continued development under the 11<sup>th</sup> Five-Year Plan will have significant impact on Hong Kong. The Hong Kong business sector will have to make adjustments by upgrading their level of technology and revamping their business models to fit in the new development in Guangdong. We also expect the two governments to help by providing the necessary infrastructural and institutional support for the private sector.

**Development of Western Pearl River Delta (PRD) and its prospects of cooperation with Hong Kong :** we note that the cities in western PRD have ample potential and the Provincial Government is in support of the area's future development. To facilitate the business sector to explore the business opportunities there, the two governments should speed up infrastructural development to facilitate passenger and cargo flow. In addition, more efforts should be made to promote business exchanges and mutual development.

In carrying out its work, the Business Council has maintained a constructive dialogue with the two governments and the CCPIT Guangdong Sub-Council and its sub-groups. We will continue to foster this working relationship in the years ahead.

I look forward to your continued support in the Business Council's work.

Yours sincerely,



Dr Victor Fung  
Chairman

The Greater Pearl River Delta Business Council

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## 珠三角最新发展情况

珠

三角经济区包括广州、深圳、东莞、佛山、江门、中山、珠海，以及惠州和肇庆的市区。虽然珠三角只占全国土地面积的0.6%及普查人口的3.4%，但在2004年却占国内生产总值的9.8%、总出口的30.6%及在2003年占全国实际利用外来直接投资的26.1%。

经过二十多年的发展，珠三角现时不但是世界工厂，亦是全球多种产品的主要采购基地。此外，珠三角亦发展了一批专业镇，主要生产一种或多种特色产品。目前，广东共有159个专业镇。

随着广东省近来的产业结构转型，珠三角的经济结构亦出现重大转变，重工业及第三产业所占的经济比重日渐增加。在各类重工业中，重化工、器材制造业、石化、钢材和汽车制造业均发展迅速。于2004年，轻工与重工业比例为44.4比55.6，而第三产业占地区生产总值的42.4%。

根据《珠江三角洲城镇群协调发展规划(2004至2020年)》，广东省将会锐意加快提升珠三角的整体竞争力。未来数年，珠三角将重点发展农业生产、加工制造、临港重工业、大型器材制造、高新技术产业、国际物流业和旅游业。

## Recent Developments in PRD

The

PRD Economic Zone includes Guangzhou, Shenzhen, Dongguan, Foshan, Jiangmen, Zhongshan, Zhuhai, and the urban areas of Huizhou and Zhaoqing. Although it encompasses only 0.6% of China's landmass and 3.4% of the census population, the PRD accounted for 9.8% of the nation's GDP and 30.6% of total exports in 2004, as well as 26.1% of foreign direct investment actually utilised in 2003.

Over the past two decades, the PRD has become a manufacturing base of the world, and one of the world's leading sourcing bases for a wide variety of products. Besides, the PRD has developed a number of specialised towns, which primarily concentrate on the production of one or more distinctive products. At present, there are 159 specialised towns in Guangdong.

In tandem with Guangdong's economic restructuring over the past few years, the PRD experienced a profound change in its industrial profile with heavy and tertiary industries taking up an increasing share of the economy. Among the various heavy industries, heavy chemical, equipment manufacturing, petrochemical, steel and automobile manufacturing have enjoyed robust growth. In 2004, the ratio of light industries to heavy industries in the PRD was 44.4:55.6, and its tertiary industry accounted for 42.4% of the GDP in the region.

As stipulated in the "Coordinated Development Plan of the Pearl River Delta City Cluster, 2004-2020", Guangdong would expedite the enhancement of the overall competitiveness of the PRD. In the years ahead, the PRD would put more emphasis on the development of its agricultural production, processing manufacturing, port-dependent heavy industry, large-scale equipment manufacturing, high-tech industries, international logistics services and tourism.

# 年报摘要

## Executive Summary

而根據廣東省“十一五”規劃，廣東省將爭取生產總值在未來五年年增長率不少於9%，在2010年地區生產總值達33,500億元人民幣(4,088億美元)，而人均生產總值會達34,825元人民幣(4,250美元)。

According to its 11<sup>th</sup> Five Year Plan, Guangdong would seek to achieve an annual GDP growth rate of no less than 9% for the next five years. By 2010, the GDP and per capita GDP are expected to hit 3,350 billion yuan (US\$408.8 billion) and 34,825 yuan (US\$ 4,250) respectively.

### 商务委员会

商务委员会的首届任期为2004年3月1日至2006年2月28日。第二届任期由2006年3月1日开始。商务委员会的主席由冯国经博士担任，委员共有31人。

为了集中处理主要的课题，在过去的一年，商务委员会成立了六个小组，继续致力研究粤港合作的主要范畴。六个小组包括：

1. 跨境人流物流工作小组
2. 落实CEPA服务业合作工作小组
3. 可持续发展工作小组
4. 联合投资贸易推广工作小组
5. 科技、教育及人才资源工作小组
6. 旅游、文化及体育工作小组

商务委员会在去年也研究了两个重要课题，并提出建议：

1. 广东省产业结构转型为香港带来的机遇和挑战
2. 珠三角西部的发展及其与香港的合作前景

### The Business Council

The Business Council's first term of office ran from 1 March 2004 to 28 February 2006 and the second term commenced on 1 March 2006. The Business Council is chaired by Dr Victor Fung and comprises 31 Members.

Six Sub-groups were formed in the past year to focus efforts on major areas of Hong Kong/Guangdong cooperation. The six Sub-groups include:

1. Cross-boundary Passenger and Cargo Flow Sub-group
2. Services-Implementation of CEPA Sub-group
3. Sustainable Development Sub-group
4. Joint Investment and Trade Promotion Sub-group
5. Technology, Education and Human Resources Sub-group
6. Tourism, Culture and Sports Sub-group

The Business Council also studied two major issues in the past year and came up with recommendations:

1. Guangdong's Economic Restructuring - Opportunities and Challenges for Hong Kong
2. The Development of Western Pearl River Delta and its prospects of Cooperation with Hong Kong

## 工作小组的工作

### 1. 跨境人流物流工作小组

去年小组的工作集中两方面：

#### i. 提升货运跨境过关的效率：

小组提出多项短期措施，包括简化货车报关程序、海关取消午饭及晚饭停关的安排、以及落实执行并加大宣传已经放宽的“四上四落”规定。小组也讨论了一些中/长期措施的建议，包括探讨“一地两检”、“检入不检出”、开办跨境直升机载客服务，和改变控制跨境私家车流量的方式。

#### ii. 新增跨境口岸：

小组建议粤港政府在莲塘筹划兴建新的跨境口岸，以应付未来发展的需要。深圳和香港政府已就此课题展开研究，小组希望深港政府能尽快就具体的计划和时间表达成共识。

### 2. 落实CEPA服务业合作小组

小组就香港服务业在进入内地市场时面对的困难，建议香港和广东省加强沟通和合作，提高政策和规例的透明度，简化申请开业的手续，加强推广宣传。同时，广东省可改善其“一站式服务”，以协助香港企业在广东省内开业。

此外，小组认为深圳市可作试点，率先推行较简化的程序及较宽松的处理政策协助香港服务业在深圳开业。香港专业服务业亦可为珠三角发展蓬勃的民营企业，提供服务，协助他们到香港发展。

小组建议商务委员会应与政府及有关机构继续跟进协助服务业和专业服务业人士进入广东省市场，并向粤港政府反映有关情况，争取放宽进入内地市场的条例；争取将旅游服务纳入CEPA内，让香港旅行社可以在内地经营；与及把握广东省经济急速发展的机会，开发商机，并协助及支持广东省发展服务业。

## Work of the Sub-groups

### 1. Cross-boundary Passenger and Cargo Flow Sub-group

Last year, the Sub-group focused its efforts on two areas:

#### i. Enhancing the efficiency of cross-boundary cargo clearance:

The Sub-group put forth a number of proposed short-term measures, including streamlining the declaration procedures for cargo trucks, cancellation of suspension of customs clearance during meal breaks and implementing the relaxation of the "four-up-four-down" rule and mounting a larger publicity drive on the relaxation. Other medium/long term measures were also discussed, which included consideration of the "co-location" and "arrival clearance only" arrangements, introduction of cross-boundary helicopter passenger services, and change in the mode of controlling cross-boundary flow of private vehicles.

#### ii. Developing new boundary crossing point:

The Sub-group proposed the two Governments to explore establishing a new boundary control point at Liantang to cope with demands from future development. To this end, the Shenzhen and HKSAR Governments have embarked on a study on the subject. The Sub-group hoped that a consensus could be reached as soon as possible between the two governments, on the concrete plan and implementation schedule for the project.

### 2. Services-Implementation of CEPA Sub-group

To address the problems encountered by Hong Kong's services sector when making inroads into the Mainland markets, the Sub-group recommended that Hong Kong and Guangdong should step up communication and cooperation, enhance the transparency of relevant policies and regulations, streamline application procedures for establishment of business operation, and intensify promotional efforts. At the same time, Guangdong could refine its "one-stop service" to facilitate the setting up of Hong Kong business there.

The Sub-group also considered that a pilot scheme could be carried out in Shenzhen, in which simplified procedures and relaxed policies should be put in place to enable Hong Kong's services sector to establish a foothold in Shenzhen. Professional services sector in Hong Kong may also render services to the rapidly developing private enterprises in the PRD to help them develop business in the Hong Kong market.

### 3. 可持续发展小组

小组去年的工作重点包括：

#### i. 改善区域空气素质：

小组建议鼓励在大珠三角设厂的港商及内地厂家以身作则，自发性地采取措施，减少排污，以改善空气质素。就此，小组和香港商界环保大联盟、广东省贸促会和广东省环保产业协会，推动企业签署《清新空气约章》。小组亦正探讨能否透过推广技术示范计划，提高广东省内港资的生产制造行业，对节省能源、减少排废、应用清洁生产等的认识。小组也积极向广东省反映，希望可尽早把汽车废气排放标准提升至国IV型（相等于欧盟四期）的标准。

#### ii. 促进社会融合发展：

小组建议香港与内地合作进行调查，以便进一步了解在内地工作／居住的港人的需要。

### 4. 联合投资贸易推广工作小组

小组去年的工作集中在以下方面：

#### i. 吸引内地投资者来港

工作小组详细考虑了香港中央政策组与广东省发展研究中心的《鼓励广东民营企业到香港发展业务研究》报告，建议建立平台，统筹在粤的香港有关机构的资讯发放和推广活动，集中运用资源。这个平台亦可让广东民企更容易取得有关香港的资料。

#### ii. 内地商人移居计划

小组认为对于有意来港开业又拟举家移居香港的内地企业家来说，可以在港居留具有一定吸引力。小组正与特区政府讨论研究有关建议。

#### iii. 与粤方小组合作

小组与粤方小组举行了多次会议，并于2005年9月在广州合办"赴港投资实务宣讲会"，向有兴趣来港的珠三角民企介绍香港的营商环境，反应热烈。两个小组将会安排有关企业来港作考察活动及在广东省其他城市举办宣讲会。

The Sub-group suggested the Business Council to follow up with the government and relevant organisations on measures to facilitate the services sector and professional sectors to enter the Guangdong market. The Council should reflect the relevant situation to both the HKSAR and Guangdong Governments in order to seek relaxation of regulations governing access to the Mainland market. The Council should also promote the incorporation of tourism services into CEPA with a view to allowing Hong Kong's travel agents to set up business in the Mainland. In addition, the Council could help to identify means to seize new business opportunities brought about by the rapid economic development of Guangdong, and to facilitate the development of services sector of the province.

### 3. Sustainable Development Sub-group

In the past year, the Sub-group focused its efforts on the following areas:

#### i. Improving regional air quality:

The Sub-group suggested that both Hong Kong and Mainland manufacturers in the GPRD region should be encouraged to set a good example by taking emission reduction measures voluntarily to improve air quality. In this connection, the Sub-group has joined hands with the Hong Kong Business Coalition on the Environment, the China Council for the Promotion of International Trade (CCPIT) Guangdong Sub-Council and the Guangdong Environmental Protection Industries Association to promote the Clean Air Charter. Besides, the Sub-group sought to establish a better understanding among Hong Kong manufacturers in Guangdong on energy saving, emission reduction and application of cleaner production technology by exploring technology demonstration projects. It also actively reflected its wish to Guangdong to raise the Province's emission standard to National IV (equivalent to Euro IV) as soon as possible.

#### ii. Facilitating social inclusion:

Regarding Hong Kong people who work or stay in the Mainland, the Sub-group suggested that a joint survey should be conducted by Hong Kong and the Mainland to gain a better idea of their needs.

### 4. Joint Investment and Trade Promotion Sub-group

In the past year, the Sub-group focused its efforts on the following areas:

#### i. Attracting Mainland investors to Hong Kong

Having considered study report on "Encouraging Guangdong Private Enterprises to set up Business in Hong Kong" by the Hong Kong Central Policy Unit in conjunction with the Guangdong Development Research Centre, the Sub-group proposed the establishment of a platform for Hong Kong organisations in

## 5. 科技、教育及人力资源工作小组

去年小组的工作集中在两方面：

### i. 教育及人才培训

小组详细研究及分析了粤港在科技、教育及人才资源培训的现行合作情况，并建议把教育加入CEPA。

### ii. 设计及科技合作

小组建议粤港可以在设计行业方面，增强沟通和人才交流，以及进一步推动科技合作。

小组将会继续探讨和推动与大珠三角省市在专业及职业培训的合作的各有关范畴，包括深港科技合作、粤港教育及科技合作和创意产业合作等。

## 6. 旅游、文化及体育工作小组

### i. 旅游：

去年小组专注探讨有关推广旅游的事项，并向有关部门提出建议，包括：

- 减低内地多程出入境签证收费，以便鼓励海外旅客，在同一行程内顺道来港旅游。
- 准许持澳门"个人游"通行证的内地旅客可以顺道来港旅游。
- 准许香港旅行社在CEPA框架下，在内地营办出入境旅行团。

### ii. 文化：

香港特区政府现时透过粤港澳艺文合作高峰会，与大珠三角地区的部门紧密合作，推动区内文化交流。小组希望两地政府可以进一步鼓励社区/文化团体(非政府团体)的交流。小组亦建议，由商务委员会继续商讨在香港成立设计中心的构思，务求令香港在区内创意/设计行业不断发展的同时，继续保持其领先的优势。

Guangdong to coordinate dissemination of information and promotion activities, and to focus the use of resources. The platform could also improve Guangdong enterprises' access to information about the Hong Kong market.

### ii. Immigration scheme for Mainland businessmen

The Sub-group considered that the prospects of residing in and relocating their family to Hong Kong might attract Mainland entrepreneurs to set up businesses in Hong Kong. The Sub-group was exploring this idea with the HKSAR Government.

### iii. Working with Guangdong counterpart

The Sub-group held several meetings with its Guangdong counterpart in the past year. In September 2005, they co-organised a seminar in Guangzhou to introduce Hong Kong to private enterprises in the PRD, which had indicated interests in setting up businesses in Hong Kong. In the light of the positive response, the two Sub-groups would organise visits by these enterprises to Hong Kong and seminars in other Guangdong cities.

## 5. Technology, Education & Human Resources Sub-group

In the past year, the Sub-group focused its efforts on the following two areas:

### i. Education and human resources training

The Sub-group had studied and analysed current cooperation between Hong Kong and Guangdong in technology, education and human resources development, and proposed the inclusion of education services in CEPA.

### ii. Design and technological cooperation

The Sub-group suggested that Hong Kong and Guangdong should enhance communication and exchanges of talents in the design sector, and further enhance technological cooperation.

The Sub-group would continue to explore and promote cooperation in professional and vocational training within GPRD area, including Hong Kong/Shenzhen technological cooperation and Hong Kong/Guangdong cooperation in education, technology and creative industries.

## 6. Tourism, Culture and Sports Sub-group

### i. Tourism:

In the past year, the Sub-group focused on the promotion of tourism and put forth recommendations to the relevant departments, which include:

## 两个研究课题

### 1. 广东产业结构转型为香港带来的机遇和挑战

广东近年实施一系列经济结构调整措施，致力提升产业结构，重点发展重工业和高增值行业，同时加速发展和优化服务业。香港的服务业可以为重工业和高新科技产业的发展，提供所需的支援服务，藉此创造商机。

因应广东省的产业结构转型，现时在珠三角的香港制造业将面对压力，需要提升技术和调整商业模式，或需迁往较偏远地区。但随着越来越多厂商迁往珠三角以外的地区，香港的制造业支援服务可藉此机会拓展市场。

报告建议广东省政府在转型过程中，给予香港企业与内地企业同等的政策支援和市场机会，并加强与香港在培训和研发方面的合作。此外，亦应优先鼓励现存企业提升科技水平和创新能力，并在海外推广上，与香港合作推广大珠三角。

报告亦建议香港特区政府加强吸引海外专才和高级管理人才来港，并借助香港在保护知识产权、资讯流通和金融服务的优势，把香港发展为技术整合中心。此外，报告也建议香港的商会多向会员解释广东产业结构转型带来的挑战和需要适应转变，及鼓励会员提升生产力和产品档次。

- a. to lower the cost of the Mainland's multiple entry visas for overseas visitors to encourage such visitors to travel to Hong Kong on the same trip;
- b. to allow Mainland visitors with valid Individual Visit Scheme permits for Macao to also visit Hong Kong on the same trip; and
- c. to allow Hong Kong travel agencies to operate both inbound and outbound tours in the Mainland under CEPA.

#### ii Culture:

Through the GPRD Cultural Summit, the HKSAR Government continued to work very closely with the GPRD authorities to enhance cooperation in cultural exchange. The Sub-group hoped that the two governments could further promote cultural exchange of community/cultural groups (non-government groups). The Sub-group also proposed the Business Council to pursue the idea of setting up a design centre in Hong Kong, in order to sustain Hong Kong's leading role in the flourishing creative/design sector in the region.

## Two Study Topics

### 1. Guangdong's Economic Restructuring - Opportunities and Challenges for Hong Kong

In recent years, Guangdong has embarked upon a rigorous economic restructuring programme focusing on the upgrading of its industries with an emphasis on heavy and high value-added industries. The province has also expedited and enhanced the development of the services sector. The services sector in Hong Kong might seize the commercial opportunities emerged from Guangdong's development of heavy and high-tech industries.

Guangdong's restructuring would exert pressure on Hong Kong's manufacturing industries in the PRD and prompt them either to upgrade their technology level and adjust their business modes or relocate to more distant areas. The relocation of manufacturing industries to areas outside the PRD might open up new opportunities there for Hong Kong's manufacturing supporting services sector.

The report proposed that the Guangdong Government should provide Hong Kong enterprises with the same treatment in policy support and market opportunities as their Guangdong counterparts in the course of restructuring, and increase cooperation with Hong Kong in manpower training and R&D. In addition, it should accord priority to upgrading existing enterprises' technology level and innovation capability, and collaborating with Hong Kong in overseas promotion on the competitiveness of the GPRD.

## 2. 珠三角西部的发展及其与香港的合作前景

近年来，广东省政府积极发展珠三角西部的城市，并不断加强区内的基础设施。根据广东省的规划，珠三角西部将重点发展综合服务功能和依托港口运输的临港工业、旅游、物流和以物资转运为主的港口贸易等第三产业。相信珠三角西部未来将会有快速发展，并为香港带来机遇与挑战。

报告认为香港必须因应珠西重点发展的产业，调整在该地的投资方向。香港亦应利用服务业优势协助珠西民营企业迈向国际市场。另外，香港商界亦应充份发挥内地市场对香港品牌的信心，在西部建立生产基地，开发内地市场。

总结以上分析，报告建议粤港政府应加强港商对珠西的认识，并消除香港与珠西之间的商贸壁垒，和推动两地之间的基础设施。此外，特区政府可加强在珠西的代表网络，广东省政府亦应加强协助香港服务业在西部的发展，及对外来投资作出清晰指引。

报告亦建议香港商业团体加深对西部营商环境的认识，积极拓展香港制造业品牌优势；利用香港的优势帮助西部的民企开拓海外市场；以及开展科技、教育与人才培训方面的合作。

The HKSAR Government was advised to step up its efforts in attracting more overseas professionals and senior management personnel to Hong Kong, and to develop Hong Kong into a technology integration hub by leveraging on our advantages in intellectual property protection, information flow and financial services. Moreover, the chambers of commerce in Hong Kong were urged to communicate with their members on the challenges arising from Guangdong's industrial transformation and the need to adapt to the changes. They should also encourage their members to increase productivity and upgrade their products.

## 2. The Development of Western PRD and its Prospects of Cooperation with Hong Kong

In recent years, the Guangdong Government has been actively developing the cities in western PRD. In parallel, sustained efforts have been made to strengthen the infrastructure of the area. According to Guangdong's plan, western PRD will accord priority to fostering integrated services and port-dependent industries, as well as tertiary industries such as tourism, logistics and harbour trade based on transshipment of material supplies. It was therefore envisaged that western PRD will develop at a high speed, bringing about both opportunities and challenges to Hong Kong.

The report suggested that Hong Kong should re-orient its investment direction in western PRD, targetting at the priority industries there, and play up its advantages in services sector to assist private enterprises in western PRD to expand into the international market. To capitalise on the confidence in Hong Kong brands in the Mainland market, it was advisable for Hong Kong's businessmen to set up production operation in western PRD to explore the domestic market in the Mainland.

Based on the above analysis, it was recommended that both the HKSAR and Guangdong Governments should enhance the awareness of Hong Kong business community on the development of western PRD, remove trade barriers and promote the development of infrastructural links between the two places. Moreover, the HKSAR Government could strengthen its representative network in western PRD, while the Guangdong Government should step up its assistance to Hong Kong's services sector in their development in western PRD, and draw up clear guidelines for external investors.

As for the Hong Kong business community, active steps should be taken to familiarise themselves with the business environment in western PRD. They should also efficiently exploit the brand names of Hong Kong manufacturing products, draw on our competitive edges to assist private enterprises in western PRD to expand into overseas markets, and embark on cooperation in technology, education and human resources development.

## 大珠三角商务委员会的对外联系工作

商务委员会及其工作小组与香港特区政府、广东省政府和中国国际贸易促进委员会广东省分会(广东省贸促会)，一直保持密切联系。

去年的主要联系活动包括：

- 商务委员会在2005年11月与全国政协经济委员会"珠三角地区经济协调发展专题组"会面，就珠三角地区的经济发展交流意见。
- 2005年11月，商务委员会组成访问团，到广东省和广西壮族自治区作三天考察。除了参观考察外，访问团亦拜会了广东省省长黄华华和广西壮族自治区党委书记曹伯纯，介绍商务委员会的工作，并就加强合作交流意见。
- 商务委员会在2005年9月与深圳市市长许宗衡会面，就加强深港合作交换意见。
- 主席与广东省贸促会会长叶耀先生举行多次会议，就两会的工作交换意见。商务委员会亦于2005年8月接待了广东省贸促会组织的企业考察团。

商务委员会亦与本港各主要机构和商会合作，委员会对各机构和商会在过去一年的支持，谨表谢意。

## External Liaison of the Greater Pearl River Delta Business Council

The Business Council and its Sub-groups have maintained close liaison with the HKSAR Government, the Guangdong Government and the CCPIT Guangdong Sub-Council.

Major liaison activities in the past year included:

- The Business Council exchanged views with the Focus Group on Coordinated Economic Development of the Pearl River Delta Region under the Economic Committee of CPPCC on the economic development of the PRD region in November 2005.
- In November 2005, a delegation organised by the Business Council made a three-day visit to Guangdong Province and Guangxi Zhuang Autonomous Region. Apart from study visits, the delegation called on Mr Huang Huahua, Governor of the Guangdong Province and Mr Cao Bochun, Party Secretary of the Guangxi Zhuang Autonomous Region to brief them on the work of the Business Council and exchange views on closer cooperation.
- The Business Council met Mr Xu Zongheng, Mayor of Shenzhen in September 2005 to exchange views on closer Hong Kong/Shenzhen cooperation.
- The Chairman had a number of meetings with Mr Ye Yao, President of CCPIT Guangdong Sub-Council to exchange views on the work of the two councils. In August 2005, the Business Council received a delegation of enterprises organised by the CCPIT Guangdong Sub-Council.

The Business Council has also worked closely with major organisations and chambers of commerce in Hong Kong. We are grateful for their support in the past year.



**香**港商界一直致力推动香港与内地的交流和合作，与政府的工作相辅相成。大珠三角商务委员会在粤港合作的各个范畴内，发挥这个关键的作用。

商务委员会汇聚香港商界人才，集思广益，提出具体的政策建议，供两地政府考虑。从如何促进可持续发展、鼓励投资、加强科技和旅游合作、提升处理跨境人流货流的效率，以至改善CEPA落实工作等方面，商务委员会均提出不少务实可行的建议。此外，商务委员会亦就广东省产业结构转型和珠三角西部发展这两方面对香港的影响进行研究，并提供专业的意见，使两地政府在制定政策时可以更切合社会及经济发展的需要。

商务委员会亦与广东省贸促会及有关机构建立了紧密的联系，在改善区内空气质素、协助广东省民营企业来港发展、为香港服务业界开拓新发展空间等多方面，携手推行了不少务实的工作，包括推动《清新空气约章》及为广东企业举办介绍来港投资的座谈会等。

虽然商务委员会成立至今仅仅两年，但已经建立了独特的平台，担当政府与商界之间的桥梁，促进沟通。面对各经济区域的迅速发展，粤港两地必须加紧合作，增强大珠三角地区的整体优势。我期望商务委员会能继往开来，联系两地，为粤港的共同发展努力。

许仕仁  
香港特别行政区政务司司长  
二零零六年六月

# 政务司司长许仕仁

## Mr Rafael Hui

### Chief Secretary for Administration

*In* partnership with the government, Hong Kong's business community has been making enormous efforts to promote exchanges and cooperation between Hong Kong and the Mainland. The Greater Pearl River Delta Business Council has been playing this pivotal role in various areas of Hong Kong/Guangdong cooperation.

The Business Council brings together talents in our local business sector, with a view to developing concrete policy proposals for consideration by the Hong Kong Special Administrative Region and Guangdong governments. The Business Council has put forward pragmatic recommendations on a wide array of issues, including sustainable development, investment promotion, strengthening technological and tourism cooperation, facilitating cross-boundary passenger and cargo flows, and improving implementation of CEPA. In addition, the Business Council has conducted studies on the impact on Hong Kong of the economic restructuring in Guangdong and the development of Western Pearl River Delta (PRD). The studies have provided suggestions to the two governments so that they can better cater for the needs of social and economic developments when formulating policies.

The Business Council has established close ties with the China Council for the Promotion of International Trade Guangdong Sub-Council and relevant organisations. They have made concerted efforts to improve air quality in the region, facilitate Guangdong private enterprises to set up business in Hong Kong and explore new business opportunities in the Mainland for the Hong Kong services sector. Concrete measures included the introduction of the Clean Air Charter and the organisation of Hong Kong Investment Promotion Seminar for Guangdong enterprises.

In no more than two years' time since its inception, the Business Council has successfully put in place a unique platform to facilitate communication between the Government and the business sector. With rapid developments in other economic regions, it is important for Hong Kong and Guangdong to step up cooperation and enhance the overall competitiveness of the Greater PRD region. I look forward to the Business Council's continued efforts in forging closer ties between the two places and promoting development of the region.



Mr Rafael Hui  
Chief Secretary for Administration of HKSAR  
June 2006



香

港大珠三角商务委员会是粤港民间合作的重要机构，自成立以来为粤港经贸合作、民间往来做了大量卓有成效的工作。特别是去年以来，大珠三角商务委员会与广东省贸促会一道，按照“前瞻、全局、务实、互利”的粤港合作原则，紧紧围绕粤港合作联席会议达成的共识及合作重点，积极交流，认真调研，紧密合作，提出不少颇有建设性和参考价值的研究报告和建议，为粤港及“泛珠三角”区域合作的全面推进做出了积极贡献！2005年粤港进出口贸易在连续多年高增长的基础上再创新高，总额突破2900亿美元，服务业、旅游、口岸、跨境大型基建、科技、文化等合作全面推进。这些成绩的取得，大珠三角商务委员会功不可没！藉此大珠三角商务委员会2005-2006年度年报出版之际，我谨代表广东省人民政府表示热烈祝贺！并对大珠三角商务委员会为推动粤港合作做出的努力和贡献表示衷心感谢！

展望新的一年，随着我国全面建设小康社会，实施“十一五”发展规划，CEPA全面实施，大珠三角、泛珠三角区域合作深入推进，必将为粤港合作带来新的机遇。希望香港大珠三角商务委员会继续发挥“沟通、研讨、建议、促进”的职能作用，当好粤港民间沟通合作的重要使者，为促进粤港合作和两地的共同繁荣发展做出新的更大贡献。

汤炳权  
广东省人民政府常务副省长  
二零零六年六月

# 广东省常务副省长汤炳权

## Mr Tang Bingquan

### Executive Vice-Governor of Guangdong Provincial People's Government

*As* a key player in fostering private sector cooperation between Guangdong and Hong Kong, the Greater Pearl River Delta Business Council has, since its inception, made tremendous contribution to facilitate trade and economic cooperation as well as private sector exchanges between the two places. Under the "forward-looking, comprehensive, pragmatic and mutually beneficial" principle, the Business Council worked in close collaboration with the CCPIT Guangdong Sub-Council last year. Through vigorous exchanges of views and studies/researches, the Business Council produced some in-depth study reports as well as constructive recommendations on major areas of cooperation agreed at the Hong Kong Guangdong Cooperation Joint Conference. These efforts contributed significantly to the promotion of Guangdong/Hong Kong cooperation as well as Pan-PRD regional cooperation. The total value of imports and exports between Guangdong and Hong Kong in 2005 reached an all-time high of more than US\$290 billion after successive growths in recent years. Cooperation is also moving forward in various areas including services industry, tourism, control point, cross-boundary major infrastructural development, technology and culture. These achievements are attributable in no small part to the Business Council's work. On behalf of the Guangdong Provincial People's Government, I wish to extend our warmest congratulations on the publication of the 2005/06 Annual Report of the Business Council. I would also like to take this opportunity to express our heartfelt appreciation of the dedication and contribution of the Business Council in strengthening cooperation between the two places.

In the year ahead, it is envisaged that the national drive to build a moderately prosperous society, the rolling out of the 11<sup>th</sup> Five-year Plan, the full implementation of CEPA, as well as enhanced GPRD and Pan-PRD regional cooperation will combine to open up new opportunities for Guangdong/Hong Kong cooperation. I hope the Business Council will continue to "enhance mutual communication, engage dialogues, make recommendations and conduct facilitation", play its part as an effective communication and collaboration platform between the private sectors of Guangdong and Hong Kong, and achieve greater success in promoting the cooperation, prosperity and development of the two places.



TANG Bingquan  
Executive Vice-Governor  
Guangdong Provincial People's Government  
June 2006

# 主席報告 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一，全国人口的三分一以上，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势头将会持续。

## 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必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是否会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 11<sup>th</sup> 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 11<sup>th</sup> 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里，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 21<sup>st</sup> 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，我们必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，定必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。

馮國經

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.

## Acknowledgements

On behalf of the Business Council, I wish to express my heartfelt gratitude to all Members and their staff officers for their commitment and dedication, their sound advice, their strategic thinking and their generosity in sharing with us their experience. I would also like to thank the Secretariat for its hard and substantial contribution to the Business Council. Finally, I also wish to thank the HKSAR and Guangdong Governments, and the China Council for the Promotion of International Trade Guangdong Sub-Council in supporting the work of the Business Council and fostering cooperation between Hong Kong and Guangdong Province.



Dr Victor Fung  
Chairman  
The Greater Pearl River Delta Business Council  
June 2006

# 大珠三角商务委员会 职权范围及架构

## Terms of Reference and Structure of the Greater Pearl River Delta Business Council



# 职权范围

## Terms of Reference

**向** 行政长官提出建议并在粤港合作联席会议框架下运作，促使大珠江三角洲（大珠三角）地区在经济上更紧密合作，负责：

1. 就加强粤港在经济及其他方面合作所需的政策及推行策略提出建议，藉此推动两地更多增值合作和可持续发展；
2. 提供途径，让粤港两地的私营机构就如何进一步促进双向贸易及投资交流意见；
3. 收集香港商界及专业界别对粤港合作事宜的意见，并转达两地政府；
4. 协同中央政策组进行关于大珠三角地区日后经济发展的策略研究；及
5. 与广东的省市机关建立更紧密的联系。

**To** advise the Chief Executive and to operate under Hong Kong/Guangdong Cooperation Joint Conference to foster closer economic cooperation within the Greater Pearl River Delta (GPRD) region by :

1. advising on the policies and implementation strategies needed to enhance the economic and other cooperation between Hong Kong and Guangdong, which in turn will facilitate more value-added operations and sustainable development on both sides of the boundary;
2. providing a forum for the private sectors in Hong Kong and Guangdong to exchange views with one another on how to further promote two-way trade and investments;
3. collecting opinions of Hong Kong business and professional sectors on issues relating to Hong Kong/Guangdong cooperation and channel them to both governments;
4. in collaboration with the Central Policy Unit, conducting strategic research into the future economic development of the GPRD region; and
5. establishing closer ties with provincial and municipal institutions in Guangdong.



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# 珠三角最新发展情况

## Recent Developments in the Pearl River Delta

# 珠三角最新发展情况

## Recent Developments in the Pearl River Delta

### 背景

珠 三角是推动中国经济发展的其中一个最重要地区，亦是广东省的经济枢纽。根据广东省的界定，珠三角经济区包括九个市，分别是广州、深圳、东莞、佛山、江门、中山、珠海，以及惠州(其中的惠州市区、惠东县和博罗县)和肇庆(其中的肇庆市区、高要市和四会市)。

### 地图

#### 广东省及珠江三角洲经济区

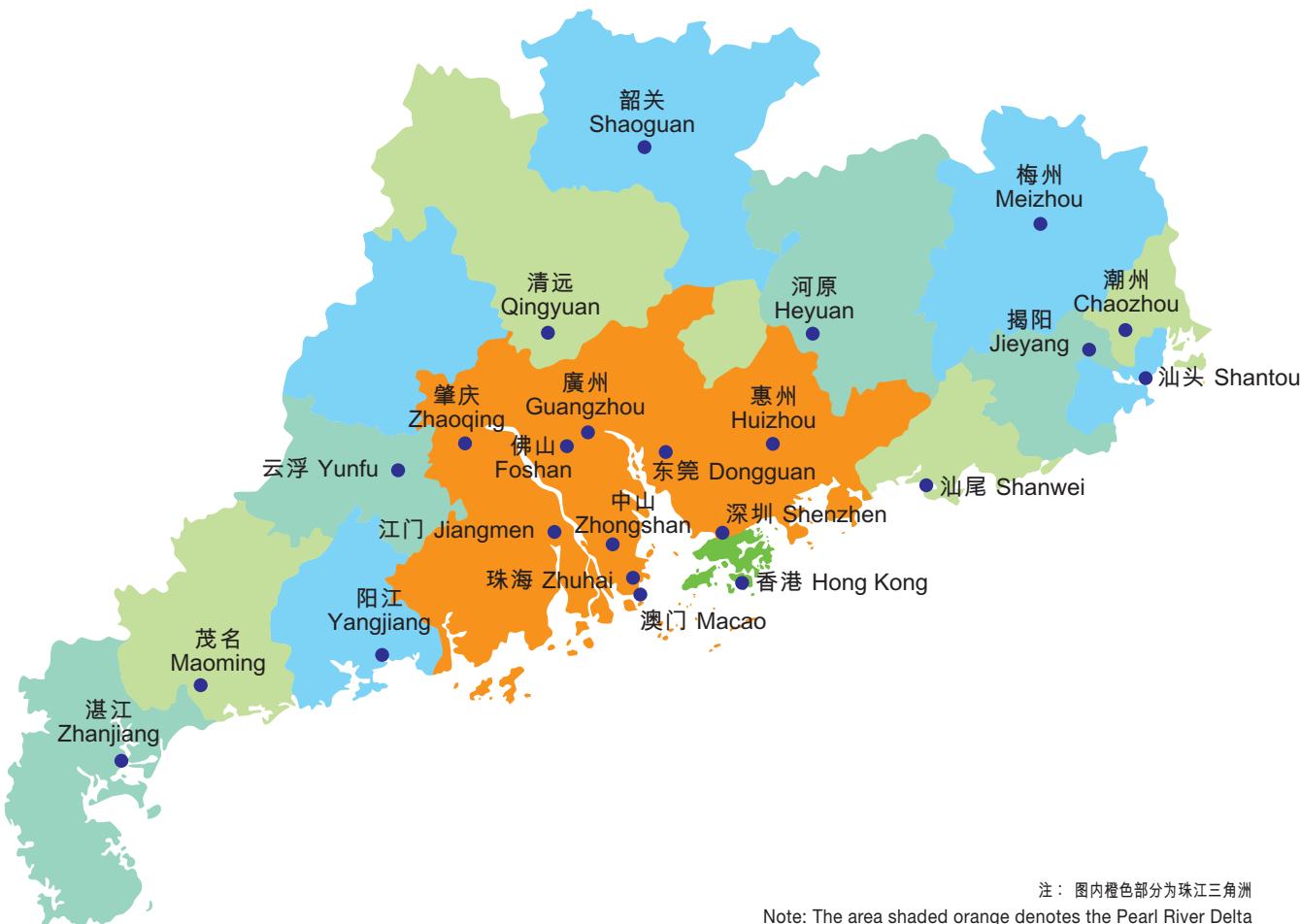
### General Background

The PRD is one of the most important regions in driving China's economic development. The region is the economic hub of Guangdong. The PRD Economic Zone, as specified by Guangdong, includes nine municipalities, namely Guangzhou, Shenzhen, Dongguan, Foshan, Jiangmen, Zhongshan, Zhuhai, and the urban areas of Huizhou (Huizhou urban district, Huidong County and Boluo County) and Zhaoqing (Zhaoqing urban district, Gaoyao County-level City and Sihui County-level City).

### Map

#### Guangdong Province and the Pearl River Delta Economic Zone

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大珠江三角洲(即珠三角加上香港及澳门)的主要管辖区

Main jurisdictions in the Greater Pearl River Delta Region  
(i.e. PRD region plus Hong Kong and Macao)



资料来源：投资推广署  
Source: Invest HK

珠三角地区的经济发展迅速，2004年的生产总值已达到13,394亿元人民币(1,618.2亿美元)。珠三角的主要经济指标见图表1及2。

The PRD region enjoys robust economic development. The GDP in 2004 amounts to RMB 1,339.4 billion (US\$ 161.8 billion). Major economic indicators of the PRD region are shown in exhibits 1 & 2.

图表1 珠江三角洲的主要经济指标（当年价格）

Exhibit 1 Major economic indicators of PRD region (at current prices)

指标 Indicator	1980	1985	1990	1995	2000	2001	2002	2003	2004
户籍人口(百万人) <sup>(1)</sup> Registered population (million persons) <sup>(1)</sup>	16.27	17.57	19.28	21.38	23.07	23.37	23.65	23.99	24.51
生产总值(亿元人民币) <sup>(2)</sup> Gross domestic product (0.1billion yuan) <sup>(2)</sup>	119.2	303.9	872.2	3,899.7	7,378.6	8,363.9	9,418.8	11,341.1	13,394.0
第一产业(亿元人民币) Primary industry (0.1billion yuan)	30.7	57.3	129.4	314.9	428.5	445.2	465.0	470.5	506.3
第二产业(亿元人民币) Secondary industry (0.1billion yuan)	54.0	148.7	404.6	1,957.1	3,657.3	4,139.0	4,688.1	5,939.6	7,206.4
第三产业(亿元人民币) Tertiary industry (0.1billion yuan)	34.5	97.9	338.2	1,627.7	3,292.9	3,779.8	4,265.6	4,930.0	5,681.3
固定资产投资总额(亿元人民币) Total amount of investment in fixed assets (0.1billion yuan)	16.6	128.4	231.4	1,491.0	2,291.6	2,566.8	2,886.6	3,739.7	4,487.0
消费品零售总额(亿元人民币) Total amount of retail sales of consumer goods (0.1billion yuan)	70.7	198.0	445.7	1,544.7	2,792.4	2,749.6	3,481.3	3,976.6	4,498.5
出口总额(亿美元) Total amount of exports (US\$ 0.1billion)	6.2	16.3	81.4	461.1	847.4	908.3	1,126.1	1,450.6	1,818.5
实际利用外资总额(亿美元) Amount of foreign capital actually utilised (US\$ 0.1billion)	1.0	7.4	15.4	85.8	125.4	141.9	150.2	170.3	注3 Notes 3
地方财政收入(亿元人民币) Local government revenue (0.1billion yuan)	23.4	49.9	95.9	315.3	595.6	745.7	768.7	848.0	932.0
地方财政支出(亿元人民币) Local government expenditure (0.1billion yuan)	8.2	26.1	76.4	316.6	682.1	822.7	963.6	1,075.0	1,210.0
城乡居民年终储蓄存款(亿元人民币) Savings deposits by urban and rural residents at year-end (0.1billion yuan)	21.0	112.0	552.7	2,810.4	6,641.0	7,670.6	9,240.2	11,068.9	12,680.0

注： (1) 根据2000年进行的全国人口普查，珠三角经济区共有人口4 080万，与官方的户籍人口数字有出入。两者出现差异的主要原因，是前者计算了外来人口和流动人口，而后者则没有把这两类人口计算在内。由于前往珠三角就业者人数众多，但却没有正式的“登记”户籍，所以珠三角在这方面的人口差异较中国其他地区为大。

(2) 内地出版的刊物已于2004年开始改称地区的GDP为“地区生产总值”（例如广东省生产总值）。中国内地整体的GDP仍称为“国内生产总值”。

(3) N.A. 暂时没有数字

Notes: (1) According to the 2000 National Census, the PRD Economic Zone had a population of 40.8 million people. This contrasts with the official registered population. The main reason for the difference between the Census and registered populations is that the former figure includes the migrant and floating populations and the latter does not. Given the large number of people that come to the PRD for employment, but do not have official 'registered' status, this discrepancy is larger in the PRD than elsewhere in China.

(2) The Chinese term for Gross Domestic Product (GDP) of a region in the Mainland has been renamed as “地区生产总值” in Mainland's publications starting from 2004 (e.g. 廣東省生產總值). That of the Mainland as a whole remains as “国内生产总值”.

(3) N.A. Data not yet available

资料来源：广东省统计局和 2002年、2003年、2004年及2005年的《广东统计年鉴》。

Sources: Guangdong Provincial Statistics Bureau, and Guangdong Statistical Yearbook 2002, 2003, 2004 and 2005.

**图表2 2004年珠三角主要城市居民的生活水平**  
**Exhibit 2 Living standard of local residents in major cities of the PRD in 2004**

主要城市 Major City	生产总值 <sup>(注 1, 3)</sup> (百万元人民币) GDP <sup>(Notes 1, 3)</sup> (million yuan) (按可比價格計算的逐年增長率) (yo growth at comparable prices)	人均生产总值 <sup>(注 2, 3)</sup> (人民币) (按可比價格計算的逐年增長率) Per capita GDP <sup>(Notes 2, 3)</sup> (yuan) (yo growth at comparable prices)	消费品零售总额 (百万元人民币)(逐年增长率) Total Retail Sales of Consumer Goods (million yuan) (yo growth)
广州 Guangzhou	445,055 (8.1%)	56,271 (13.7%)	167,777 (12.3%)
深圳 Shenzhen	428,214 (17.3%)	59,271 (7.8%)	125,064 (56.0%)
珠海 Zhuhai	55,168 (13.8%)	41,848 (9.5%)	18,922 (18.9%)
佛山 Foshan	191,804 (18.3%)	47,658 (14.3%)	55,575 (17.4%)
江门 Jiangmen	69,564 (12.2%)	21,647 (11.0%)	27,583 (-0.7%)
东莞 Dongguan	180,603 (19.6%)	71,995 (17.4%)	42,647 (26.2%)
中山 Zhongshan	70,430 (15.4%)	44,006 (17.3%)	23,461 (54.6%)
惠州 Huizhou	68,645 (15.1%)	23,643 (13.1%)	21,316 (17.3%)
肇庆 Zhaoqing	39,056 (13.2%)	13,945 (12.7%)	12,086 (-29.4%)

注： (1) 内地出版的刊物已于2004年开始改称地区的GDP为"地区生产总值" (例如广东省生产总值)。中国内地整体的GDP仍称为"国内生产总值"。  
 (2) 内地出版的刊物已于2004年开始改称地区的Per capita GDP为"人均地区生产总值" (例如人均广东省生产总值)。中国内地整体的Per capita GDP仍称为"人均国内生产总值"。  
 (3) 生产总值数字为初步核算数字，稍后会根据2004年的经济普查结果作出调整。为适应经济和社会发展需要，并与国家编制的五年规划作好衔接，推进国民经济核算与统计调查体系综合配套改革，国务院于2003年7月决定，将原有的工业普查、第三产业普查和基本单位普查合并，并将建筑业纳入普查范围，在2004年开展第一次全国经济普查。普查的标准时点是2004年12月31日，时期资料为2004年度。

Notes:(1) The Chinese term for Gross Domestic Product (GDP) of a region in the Mainland has been renamed as "地区生产总值" in Mainland's publications starting from 2004 (e.g. 广东省生产总值). That of the Mainland as a whole remains as "国内生产总值".  
 (2) The Chinese term for Per capita GDP of a region in the Mainland has been renamed as "人均地區生產總值" in Mainland's publications starting from 2004 (e.g. 人均广东省生产总值). That of the Mainland as a whole remains as "人均国内生产总值".  
 (3) The figures for GDP are preliminary estimates and subject to revision later according to results of Economic Census conducted in 2004. In July 2003, the State Council decided to conduct the first national economic census in 2004 by combining the former industrial census, the tertiary industry census and establishment census, and including the construction sector in the census. Its main purpose is to meet the needs of economic and social development, to better link up with the National Five-Year program and to push forward the comprehensive reform of national economic accounting system and statistical survey system. The reference time for the census was 31st December 2004, and the flow data covered the whole year of 2004.

资料来源：《广东统计年鉴—2005》，2005年各市的统计公报及《广东统计概要2006》

Sources: *Guangdong Statistical Yearbook 2005, statistical communiques of individual cities 2005 and 广东统计概要2006.*

虽然珠三角经济区只占全国土地面积的0.4%及普查人口的3.2%，但在2004年却占国内生产总值的9.8%、总出口的30.6%及在2003年占全国实际利用外来直接投资的26.1%(图表3)。

Although the PRD economic zone encompassed only 0.4% of China's land mass and only 3.2% of the census population, they accounted for 9.8% of the nation's GDP, 30.6% of total exports in 2004 and 26.1% of foreign direct investment actually used in 2003 (Exhibit 3).

**图表3 珠三角经济区对广东和内地的重要性**

**Exhibit 3 The importance of PRD Economic Zone in Guangdong and the Mainland**

	2004	
	珠三角经济区所占百分比 % share of PRD Economic Zone in	
	广东 Guangdong	内地 Mainland
土地面积 Land area	23.2%	0.4%
户籍登记人口 Population of Household Registration	31.4%	1.9%
普查人口 Census population	47.8%	3.2%
生产总值 GDP	83.5%	9.8%
出口 Exports	94.9%	30.6%
实际利用外来直接投资 Foreign Direct Investment actually used	89.7% (2003)	26.1% (2003)

资料来源：《中国统计年鉴—2005》、《广东统计年鉴—2005》

Sources : China Statistical Yearbook 2005, Guangdong Statistical Yearbook 2005

**图表4 2005年珠三角个别城市的经济指标**  
**Exhibit 4 Economic indicators of individual cities in the PRD**

主要城市	生产总值 <sup>(1)</sup> (亿元人民币) GDP <sup>(1)</sup> (0.1billion yuan)	生产总值的组合成分 <sup>(1)</sup> Composition of GDP <sup>(1)</sup>		
		第一产业 (%) Primary industry (%)	第二产业 (%) Secondary industry (%)	第三产业 (%) Tertiary industry (%)
广州 Guangzhou	5,115.8	2.5	40.7	56.9
深圳 Shenzhen	4,926.9	0.2	52.4	47.4
珠海 Zhuhai	634.6	3.2	51.9	44.9
佛山 Foshan	2,379.8	3.5	60.4	36.1
惠州 Huizhou	803.9	10.3	57.2	32.5
东莞 Dongguan	2,182.4	1.0	56.5	42.5
中山 Zhongshan	817.6	3.8	61.4	34.8
江门 Jiangmen	802.2	9.9	49.6	40.5
肇庆 Zhaoqing	453.6	31.2	25.6	43.2

注： (1) 此乃初步核算数字，实际数字有待修订。为适应经济和社会发展需要，并与国家编制的五年规划作好衔接，推进国民经济核算与统计调查体系综合配套改革，国务院于2003年7月决定，将原有的工业普查、第三产业普查和基本单位普查合并，并将建筑业纳入普查范围，在2004年开展第一次全国经济普查。普查的标准时点是2004年12月31日，时期资料为2004年度。  
(2) 数字指规模以上的工业企业(全部国有工业企业和年产品销售收入500万元人民币以上的非国有工业企业)。  
(3) N.A. 暂时没有数字

Notes : (1) The figures are preliminary estimates and subject to revision. In July 2003, the State Council decided to conduct the first national economic census in 2004 by combining the former industrial census, the tertiary industry census and establishment census, and included the construction sector in the census. Its main purpose is to meet the needs of economic and social development, to better link up with the National Five-Year program and to push forward the comprehensive reform of national economic accounting system and statistical survey system. The reference time for the census was 31st December 2004, and the flow data covered the whole year of 2004.  
(2) Figures refer to industrial enterprises above designated size (all state-owned industrial enterprises and non-state-owned industrial enterprises with an annual sales revenue over 5 million yuan).  
(3) N.A. Data not yet available

资料来源：有关城市的统计公报和《广东统计概要2006》

Sources : Statistical communiques of relevant cities and 广东统计概要2006.

	工业总产值 <sup>(2)</sup> (亿元人民币) Gross Industrial Output <sup>(2)</sup> (0.1billion yuan)	出入口总额 (亿美元) Imports and Exports (0.1billion USD)	实际利用外来 直接投资 (百万美元) FDI actually used (million USD)	城市居民人均 可支配收入(人民币) Per capita disposable income of urban residents (yuan)	人均生产 总值 <sup>(1)</sup> (人民币) Per capita GDP <sup>(1)</sup> (yuan)	消费品零售总额 (亿元人民币) Retail sales of consumer goods (0.1billion yuan)
	6,032.1	534.9	2,649	18,287	N.A. <sup>(3)</sup>	189.9
	9,567.7	1,828.2	2,969	21,494	60,507	143.8
	1,562.0	257.3	666	18,908	45,258	22.0
	4,739.8	257.1	929	17,424	41,031	63.4
	1,411.9	190.2	1,042	14,884	21,911	25.2
	3,812.8	743.7	1,468	22,882	N.A. <sup>(3)</sup>	50.0
	2,216.9	186.9	654	17,255	33,631	27.7
	1,443.3	90.6	606	12,903	19,600	31.0
	319.9	21.8	603	10,097	N.A. <sup>(3)</sup>	14.2

## 珠三角成为制造及采购基地

经过二十多年的发展，珠三角不但成为国内实力雄厚的制造业基地，亦是世界工厂，在纺织及服装、鞋履、塑胶制品、电脑、电子资讯、电子及电器产品、玩具等多个产业的发展上，均举足轻重。珠三角地区在制造原料和半制成品方面占有独特的优势，亦是全球多种产品的主要采购基地。

## 产业群及专业镇

一如其他的地区经济体系，珠三角内有多个发展蓬勃的产业群，而珠三角产业群的一个明显特征就是发展出一批专业镇。这些专业镇专门生产一种或多种特色产品，一般从事传统的制造业、农业及电子资讯业。广东目前有159个专业镇<sup>1</sup>。虽然珠三角区内不少专业镇均位于珠三角西部城市，特别是佛山、江门和中山，但珠三角东部的部分城市亦有大量专业镇，最典型的例子是东莞，广东省有10个专业镇均位于东莞市。图表5载列珠三角部分专业镇的资料。

## PRD as a manufacturing and sourcing base

Over the past two decades, the PRD has become the manufacturing powerhouse of China. As a manufacturing base of the world, the region is playing a leading role in various industries, including textile and apparel, footwear, plastic products, computers, electronic information, electronic and electrical goods, toys, etc. The region has a distinct edge in manufacturing of raw materials and intermediate products. It has become one of the world's leading sourcing bases for a wide variety of products.

## Industrial clusters and specialised towns

Like other regional economies, the PRD has developed a number of vibrant industrial clusters. A distinctive feature of the PRD industrial clusters is the development of specialised towns. These specialised towns specialise in the production of one or more distinctive products. Generally, they are in traditional manufacturing, agricultural or electronic information sectors. At present there are 159 specialised towns in Guangdong<sup>1</sup>. Within the PRD, many of these specialised towns are located in the cities in western PRD - particularly in Foshan, Jiangmen and Zhongshan; yet, some cities in the eastern PRD also account for a large number of specialised towns - a typical example is Dongguan, which accounts for 10 specialised towns in Guangdong. Exhibit 5 shows the selected specialised towns in the PRD.

<sup>1</sup> 资料来源：广东省人民政府工作报告(2006年2月22日)

<sup>1</sup> Source: Work Report of Guangdong Province People's Government (22 February, 2006)

图表5 广东省部分专业镇

Exhibit 5 Selected specialised towns in Guangdong

市 Cities	镇 Towns	产业群 Industrial clusters	市 Cities	镇 Towns	产业群 Industrial clusters
佛山 Foshan	Lanshi (澜石)	Stainless steel 不锈钢	东莞 Dongguan	Shilong (石龙)	Electronics 电子产品
	Zhangcha (张槎)	Knit wear 针织品		Zhangan (长安)	Electronics 电子产品
	Datang (大塘)	Vegetable 蔬菜		Dongfeng (东凤)	Household electrical appliances 家庭电器
	Shiwan (石湾)	Construction ceramic 建筑陶瓷		Minzhong (民众)	bananas 香蕉
	Yanbu (盐步)	Underwear 内衣		Humen (虎门)	Garment 成衣
	Chencun (陈村)	Flower 花卉		Dalong (大朗)	Knitted wear (wool) 毛织品
	Guangao (官窑)	Toy 玩具		Changping (常平)	Logistics 物流
	Nanzhuang (南庄)	Porcelain 瓷器		Shijie (石碣)	Electronics 电子产品
	Pingzhou (平洲)	Shoes 鞋履		Houjie (厚街)	Furniture 家俬
	Lecong (乐从)	Furniture 家俬		Qingxi (清溪)	Electronics 电子产品
	Lunjiao (伦教)	Wood Machinery 木工机械	中山 Zhongshan	Shaxi (沙溪)	Garment 成衣
	Genglou (更楼)	Cultivation 农产品		Xiaolan (小榄)	Metal 金属
	Xiqiao (西樵)	Textiles 纺织品		Guzhen (古镇)	Lights 灯饰
	Jinsha (金沙)	Metal 金属		Huangpu (黄圃)	Food 食品
	Dali (大沥)	Aluminium material 铝材		Nantou (南头)	Electrical appliances 电器用品
江门 Jiangmen	Jianghai (江海)	Electronic material 电子物料		Dayong (大涌)	Furniture 家俬
	Pengjiang (蓬江)	Motorcycle 电单车	广州 Guangzhou	Shiling (狮岭)	Leather product 皮革产品
	Shuikou (水口)	Heater 加热器		Xintang (新塘)	Jeans, garment 牛仔裤及成衣
	Encheng (恩城)	Microphone 扬声器	珠海 Zhuhai	Huangfu (黄埠)	Shoes 鞋履
	Shaping (沙坪)	Garment (manufacturing) 制衣		Jinli (金利)	Metal products 金属产品
	Shagang (沙冈)	Textiles 纺织品			
	Shangxiachuan (上下川)	Ocean tourism 海洋旅游业			
	Siqian (司前)	Stainless steel 不锈钢			
	Daao (大鳌)	Container 货柜			

资料来源：王珺：《珠江三角洲西岸地区产业集群生成机制研究》，《城市经济、区域经济》2006。

Source: Wang jun, "Study on the Industrial clusters in the western Pearl River Delta", Urban and Regional Economy 2006.

## 产业结构转型

多年来，劳工密集的轻工业在推动广东省工业发展方面一直占主要地位。不过，这情况正出现转变，广东省的产业结构近年已逐渐转型。

首先，珠三角正迅速转向重工业发展，轻工与重工业比例已由1978年的56.6:44.4变为2004年的44.4:55.6。同年，重工业的总产值为12,867亿元人民币(1,554.5亿美元)，较前一年上升28.8%。相比之下，轻工业较为逊色，总产值只有10,286亿元人民币(1,242.8亿美元)，升幅为19%。在各类重工业中，重化工和器材制造业均录得强劲增长，而石化、钢材和汽车制造业亦发展迅速。举例来说，汽车制造业在2004年的总产值为783亿元人民币(94.6亿美元)，较前一年上升43%。

此外，珠三角的经济结构亦出现重大转变，第三产业所占的经济比重日渐增加。在1978至2004年间，以地区生产总值计算，珠三角三类产业的比例由25.8:45.3:28.9发展为3.8:53.8:42.4，第三产业所占的比例增加了46.7%。

## 珠三角市场

今天，珠三角是内地最大、最成熟的消费市场之一。2004年，该区的人均生产总值为46,304元人民币(5,594美元)，是全国平均的12,336元人民币(1,490.4美元)的3.8倍。城市居民的人均可支配收入达17,290元人民币(2,088.9美元)，是全国平均的9,422元人民币(1,138.3美元)的1.84倍。

珠三角居民日益富裕，对各种服务(如教育、康乐文化、交通、邮递通讯、金融等)的需求亦随之增加。同时，商业服务近年亦随着第二产业的持续增长而迅速发展。

2004年，珠三角的消费品零售总额达4,499亿元人民币(543.5亿美元)，占该区生产总值三分一以上。主要的消费市场位于广州及深圳，其零售额分别占珠三角零售总额的37%及28%。

广东消费者的消费模式与内地其他地区一样，出现了重大变化。居民的可动用收入增加，提升了消费结构。

零售业不断迅速发展。自2005年起，国家按照加入世贸的承诺进一步开放分销业，全面取消在零售地点、拥有权架构及店铺数目方面对外资零售商的限制。此举彻底改变了珠三角零售业的面貌，各类现代化零售经营模式，如超级市场、特大超级市场、便利店、专业服务店、专门店、购物商场/中心，以及网上订购等，纷纷应运而生。

## Industrial Restructuring

For years, labour-intensive light industries have played a key role in powering the industrial development of Guangdong. However, changes are taking place. The industrial structure has gradually transformed in recent years.

First, the PRD is moving swiftly towards heavy industries. The proportion of its light industries to its heavy industries changed from 56.6:44.4 in 1978 to 44.4:55.6 in 2004. In 2004, the total industrial output yielded by heavy industries was RMB 1,286.7 billion (US\$155 billion), representing a year-on-year (yoY) increase of 28.8%, which compared favourably with the RMB 1,028.6 billion (US\$124.3 billion) and a yoY increase of 19% yielded by the light industries. Among the various heavy industries, heavy chemical and equipment manufacturing have enjoyed robust growth while the petrochemical, steel, as well as automobile manufacturing are also growing rapidly. For instance, the automobile manufacturing industry achieved an output valued at RMB 78.3 billion (US\$9.46 billion) in 2004, up by 43% yoY.

Furthermore, the composition of economy has experienced a profound change with tertiary industry taking up an increasing share of the economy. Between 1978 and 2004, the ratio of the three sectors in PRD's GDP changed from 25.8: 45.3: 28.9 to 3.8: 53.8: 42.4, with the proportion of the tertiary industry increased by 46.7%.

## PRD as a Market

Today, PRD is one of the largest and most sophisticated consumer markets in the Mainland. In 2004, the region enjoyed a Per capita GDP of RMB 46,304 (US\$5,594), which was 3.8 times as large as the national average of RMB 12,336 (US\$1,490.4). Per capital disposable income of urban residents reached RMB 17,290 (US\$2,088.9), 1.84 times as large as the national average of RMB 9,422 (US\$1,138.3).

Increased affluence of PRD residents has boosted the demand for services like education, cultural and recreation services, transport, post and communication services, and financial services, etc. Meanwhile, business services have also been developing rapidly in recent years, along with the constant growth of the secondary industry.

Total retail sales of consumer goods in the PRD reached RMB 449.9 billion (US\$54.35 billion) in 2004, accounting for over one-third of the region's GDP. Major consumer markets are in Guangzhou and Shenzhen, accounting for 37% and 28% of the region's retail sales respectively.

In Guangdong, as in other parts of China, consumers' consumption pattern has undergone significant changes. The rising disposable income of people has led to the upgrading of consumption structure.

The retail sector has been evolving rapidly. Starting from 2005, China further liberalised its distribution sector in accordance with its WTO commitments. The restrictions on locations, ownership structure and number of stores imposed on all foreign retailers have been eliminated. These have altered the PRD's retail landscape and led to the emergence of modern retail formats such as supermarkets, hypermarkets, convenience stores, professional stores, specialty stores, shopping malls/centres and on-line ordering, etc.

## 加速基建发展

广东省政府一直致力加强珠三角区内各地的交通连系。现时广东省所有大城市之间均有公路和铁路连接。

### 铁路

《珠江三角洲地区城际轨道交通网规划(2005至2020年)》获得通过，标志着珠三角铁路发展进入一个新里程。这些城际高速铁路和市地铁路建成后，会在珠三角城际之间形成“一小时经济生活圈”。这个“A”字型的主要网络包括广深<sup>2</sup>和广珠两条主线，另有两条副线(广州至肇庆；中山小榄至江门；东莞至惠州)和两条连接珠三角两岸城市(顺德至番禺至东莞；中山至虎门)的支线。铁路全长570公里，主线将于2010年建成。

其他正在兴建的主要铁路包括广珠铁路，连接广州和位于珠三角西部的珠海。另一项工程是连接华中湖北省省会武汉及广州的武广高速铁路。这条铁路将会连接广深港高速铁路，届时武汉至香港的车程将由现时的12小时缩短至5小时。第三项工程是由深圳至杭州的杭福深客运专线。按照内地现时的铁路发展计划，上述工程将于2010年完成。

### 高速公路／公路

根据《广东省高速公路网规划(2004至2030年)》文件，一个全长6 500公里的高速公路网将于2004至2030年间建成，其中2 140公里预计位于珠三角内。

现时，正在规划或兴建的主要高速公路／公路包括广深沿江高速及深港西部通道、港珠澳大桥、京珠高速、广珠西线及西部沿海高速公路。工程完成后，将会大大增强香港与内地的经济联系及合作关系。

## Accelerating Infrastructure Construction

The Guangdong Provincial Government has been making vigorous efforts to strengthen the transport link within the PRD. Today, all cities in Guangdong are interconnected by highways and railways.

### Railways

The approval of the "Plan of the Pearl River Delta Intercity-city High Speed Rail (2005-2020)" signified a new regime for the railway development in the PRD. Upon completion of the construction of these inter-city high speed rail links and city metro trains, it is expected to create an "one hour economic and living sphere" in the PRD. The main frame of the network is formed like an "A shape" by two principal axis (Guangzhou-Shenzhen<sup>2</sup>; Guangzhou-Zhuhai), two subordinate lines (Guangzhou-Zhaoqing; Xiaolan in Zhongshan-Jiangmen; Dongguan-Huizhou) and two minor lines connecting cities on the two banks of the PRD (Shunde-Panyu-Dongguan; Zhongshan-Humen). The total mileage of the railways is 570 km. The principal axis will be completed in 2010.

Other major railways under construction include the Guangzhou-Zhuhai Railway linking Guangzhou with Zhuhai on the west side of the PRD. Another project is the Wuhan-Guangzhou Express Railway connecting Wuhan, capital of central China's Hubei province to Guangzhou. This Express Railway connects with Guangzhou-Shenzhen-Hong Kong Express Rail Link and travelling time between Wuhan and Hong Kong will be shortened to 5 hours from currently 12 hours. A third project is the Hangzhou-Fuzhou-Shenzhen Passenger Line which goes from Shenzhen to Hangzhou. According to the Mainland's current railway development plan, these railway projects would be completed before 2010.

### Expressways/Highways

As stipulated in the "Guangdong Province Expressway Network Plan (2004-2030)", a traffic network with 6 500 km of expressway will be built during 2004-2030, of which 2 140 km is expected to be located in the PRD.

At present, the major expressways/highways under planning or construction include the Guangzhou-Shenzhen Expressway and the Hong Kong-Shenzhen Western Corridor, the Hong Kong-Zhuhai-Macao Bridge, the Beijing-Zhuhai Expressway, the Guangzhou-Zhuhai West Line, and the Western Coastal Expressway. Upon their completion, these projects will considerably help strengthen the economic west ties and cooperation between Hong Kong and the Mainland.

2 广深主线延伸至香港，亦即广深港高速铁路。

2 The Guangzhou-Shenzhen axis is extended to Hong Kong and is known as the Guangzhou-Shenzhen-Hong Kong Express Rail Link.

## 港口

珠三角港口对工业制品出口至为重要。珠三角的主要港口位于深圳(盐田、大铲湾、赤湾、妈湾及蛇口)、广州(南沙、黄埔、新沙、洪圣沙及西基)、珠海(高栏、洪湾、九洲、湾仔及斗门)和中山(神湾、小榄及中山)，当中以位于深圳的港口最为重要。2005年，深圳港的货柜吞吐量位列全球第四及全国第二位，达1619.7万标准货柜单位(较去年上升18.6%)。

根据《珠江三角洲地区港口建设规划(2004至2010年)》文件<sup>3</sup>，截至2003年末，珠江三角洲地区港口吞吐能力是2.52亿吨。因应珠三角地区将会进一步发展外向型加工业、船舶与汽车制造业、石油化工等重化工业，在集装箱运输及能源、原材料运输等方面将有更大的需求，码头建设的重点亦会围绕集装箱和进口汽油泊位进行。预计到2010年，珠江三角洲地区的港口吞吐能力可达到6.5亿吨。

## 机场

至于航空方面，大珠三角共有五个机场，分别为香港国际机场、澳门国际机场、深圳宝安国际机场、广州新白云国际机场及珠海机场。预期大珠三角对航空服务的需求将会大增，为大珠三角各个机场带来大量商机。

## Ports

Ports in the PRD play a crucial role in the export of manufactured goods abroad. Shenzhen (Yantian, Dachanwan, Chiwan, Mawan and Shekou), Guangzhou (Nansha, Huangpu, Xinsha, Hongshengsha and Siji), Zhuhai (Gaolan, Hongwan, Jiuzhou, Wanzai and Doumen) and Zhongshan (Shenwan, Xiaolan and Zhongshan) are some major ports in the PRD. Among these, Shenzhen is the most prominent one. In 2005, it ranked fourth in the world and second in Mainland China in terms of container throughput, amounting to 16.197 million TEU (up by 18.6% year-on-year).

According to the "Port Development Plan for the Pearl River Delta Region (2004-2010)"<sup>3</sup>, as at end of 2003, the throughput capacity of PRD ports stood at 252 million tonnes. It is envisaged that further developments in the direction of outward processing industry as well as heavy and chemical industries like shipbuilding, automobile manufacturing and petrochemical in the region will generate greater demands for transport of container, fuel and raw materials. Port development in PRD will also centre around the construction of container and oil berth facilities. By 2010, the throughput capacity of PRD ports is expected to reach 650 million tonnes.

## Airports

There are 5 airports in the Greater PRD, namely Hong Kong International Airport, Macao International Airport, Shenzhen Baoan International Airport, New Baiyun Airport in Guangzhou and Zhuhai Airport. The demand for air services within the GPRD is expected to grow significantly, thereby providing tremendous business opportunities for these airports.

## 珠江三角洲城镇群协调发展规划 (2004至2020年)

过去数年，广东省政府推出一连串措施，加强协调珠三角的工业发展。广东省人大常委会先后于2005年1月和同年8月通过及颁布《珠江三角洲城镇群协调发展规划(2004至2020年)》。规划中表明广东省会锐意加快提升珠三角的整体竞争力，维持珠三角作为主要生产基地的地位，以及将珠三角发展为全球最具经济活力的地区之一。

该协调发展规划亦勾划出珠三角的初步工业布局。未来数年，珠三角将重点发展下列经济群：农业生产、加工制造、临港重工业、大型器材制造、高新技术产业、国际物流枢纽和旅游业。此外，珠三角亦会加速专业镇和工业园区的发展，最终目的是创建实力和竞争力兼备的工业，巩固珠三角作为全球生产基地的地位。

另一方面，粤港合作联席会议辖下的粤港澳城市规划及发展专责小组已展开大珠江三角洲城镇群协调发展规划研究，从前瞻性的角度考虑和分析大珠三角的发展方向，藉此制定城市和区域发展策略。有关策略旨在解决基建发展、环境保护和协调发展的架构机制等重大区域发展问题，从而加强大珠三角地区的整体竞争优势，同时确保该区得以持续发展。研究已于2006年3月展开，预计在24个月内完成。

## "Coordination and Development Plan of the Pearl River Delta City Cluster, 2004-2020"

In the past few years, the Guangdong Provincial Government launched a series of measures to better coordinate the industrial development of the PRD. In January 2005, the Standing Committee of Guangdong Provincial People's Congress approved the "Coordination and Development Plan of the Pearl River Delta City Cluster, 2004-2020" which was promulgated in August 2005. The Plan stipulated the province's intention to expedite the overall competitiveness of the PRD, maintain the region as one of the top-manufacturing powerhouses and transform the region into one of the most vibrant regions in the world.

The Plan also mapped out the tentative industrial setting of the PRD. In the years ahead, the PRD would put more emphasis on the development of the following economic clusters: agriculture production, processing manufacturing, heavy industry near the port, large-scale equipment manufacturing, high-tech industries, international logistics hub and tourism. Besides, the region would also expedite the development of specialised towns and industrial parks. The ultimate goal was to create a strong and highly competitive industrial sector so as to consolidate its status as the world's manufacturing powerhouse.

Meanwhile, the Expert Group on HK/GD Town Planning and Development under the HK/GD Co-operation Joint Conference had commenced a joint planning study on the Coordinated Development of the Greater PRD Township. This study seeks to formulate a city and regional development strategy by taking a forward-looking perspective to consider and to analyse the development direction of the Greater PRD. By addressing major regional development issues related to infrastructure development, environmental protection and institutional mechanisms for coordinated development, the strategy to be formulated will seek to enhance the competitive edge of the Greater PRD Region as a whole whilst securing sustainable development. The study commenced in March 2006 and is expected to be completed in 24 months.

## 广东“十一五”规划

广东“十一五”规划为广东省定下2006至2010年的发展蓝图。在该五年内，随着国家加入世贸的过渡期于2005年完结，广东在国际贸易上将面临激烈竞争。

根据“十一五”规划，广东将会集中力量改善经济、文化与法律制度，并建设和谐社会。广东将争取生产总值在未来五年年增长率不少于9%，并且在2010年生产总值达33,500亿元人民币(4,088亿美元)。预期到了2010年，广东的人均生产总值会较2000年的翻一翻，达到34,824.5元人民币(4,250美元)。该省三类经济产业的比例，预计会由2005年的6.3:49.5:44.2变为2010年的5:50:45；而2010年的单位生产总值能源消耗会较2005年的最少降低13%。

此外，为响应中央政府号召以“科学发展观”指导建设，广东将致力推动可持续发展及和谐区域发展。在“十一五”期间，该省将鼓励和支持自主创新的措施。广东将会提升珠三角的发展水平，巩固广州及深圳作为广东省领导城市的地位，又会大力推动落实CEPA，制订加强粤港澳合作的措施。此外，广东亦会积极推进泛珠三角区域合作。

事实上，正如在《广东省人民政府工作报告》(于2006年2月22日发表)所述，广东将会通过上述措施，与香港及澳门特区更紧密合作。三地合作的主要范畴包括基建、跨境人流物流、贸易、旅游、环境保护、科学与科技、教育、流行病防控，以及食物安全等。

## Guangdong's 11<sup>th</sup> Five Year Plan

Guangdong's 11<sup>th</sup> Five Year Plan provides a blueprint for Guangdong's development in 2006-2010 during which Guangdong will face keen competition in international trading as the transitional period of China's accession to the WTO ended in 2005.

According to the 11<sup>th</sup> Five Year Plan, Guangdong would focus its efforts on improving its economy, culture, legal system and building a harmonious society. The Province would seek to achieve an annual GDP growth rate of no less than 9 percent for the next five years and GDP is expected to hit RMB 3,350 billion (US\$408.8 billion) in 2010. The Per capita GDP in 2010 is expected to double that of 2000 and reach RMB 34,824.5 (US\$ 4,250). The ratio of the three sectors of economy is anticipated to change from 6.3:49.5:44.2 in 2005 to 5:50:45 in 2010. The energy consumption per GDP unit in 2010 should fall by at least 13 percent as compared to that of 2005.

Moreover, guided by the Central government's promotion of 'scientific development', Guangdong would dedicate efforts to sustainable development and harmonious regional development. In the period, the Province would encourage and support self-innovation initiatives. It would enhance the development level of the PRD and strengthen the role of Guangzhou and Shenzhen as the leading cities in Guangdong. In addition, it would better facilitate the implementation of CEPA and map out measures to strengthen cooperation with Hong Kong and Macao. Besides, the Province would actively push forward Pan-PRD regional cooperation.

In fact, as stated in the "Work Report of Guangdong Province People's Government" (issued on 22 February, 2006), the Province would use the initiative to work even more closely with Hong Kong and Macao SARs. Infrastructure projects, cross-boundary flow of people and cargo, trade, tourism, environmental protection, science and technology, education, epidemic disease prevention and food safety would be among the major cooperation areas of the three sides.

# 两个主要研究课题报告 Reports on Two Major Studies

# 广东省产业结构转型为香港带来的机遇和挑战

## Guangdong's Economic Restructuring Opportunities and Challenges for Hong Kong

### 广东经济转型的大方向

广东近年实施一系列经济结构调整措施，致力提升产业结构，重点发展重工业和高增值行业，同时加速发展服务业。

估计在未来五年，省内汽车、石化和信息产业的增长会较其他产业为快。根据广东省政府订下的每年增长目标，上述三个产业在2003至2010年的年均增长分别为25%、20%和21%。到了2010年，信息产业占广东制造业总产值的比率预计将达33.8%，石化和汽车业则合共占16.4%。广东转向重工业发展的趋势十分明显。2005年，重工业总产值超过2万亿元人民币(2,441亿美元)，占全省工业总产值的57%。

为提升珠三角的产业结构，广东不再鼓励劳动密集及／或高能耗的低增值制造业到省内设厂投资，并采取措施鼓励现时已在珠三角发展的工业积极提升和创新科技，或者迁往省内的山区或东西两翼。

服务业在2005年占全省生产总值的43.8%，广东希望在未来五年把这个比率进一步提高。除了全面加速发展服务业外，还会优化服务业结构，把广东发展为华南的金融中心和现代物流枢纽，以及国际商务旅游及购物中心。广东将会加强和鼓励个别行业，如批发零售、物流、金融、会展和商业(专业)服务的发展。

### Major Directions of Guangdong's Economic Restructuring

In recent years, Guangdong Province had embarked upon a rigorous economic restructuring programme, focusing on the upgrading of its industries with an emphasis on heavy and high value-added industries; and expediting the development of the services sector.

In the next five years, it was anticipated that there would be faster growth in the development of the automobile, petrochemical and information technology industries, on which the Guangdong government had set an annual growth target of 25%, 20% and 21% respectively between 2003-2010. By 2010, the share of information technology industries in Guangdong's total manufacturing production output was anticipated to reach 33.8%, while that of the petrochemical and automobile industries together will account for 16.4%. The gearing towards heavy industries in Guangdong was evident. In 2005, the output value of heavy industries exceeded RMB 2,000 billion (US\$244.1 billion), accounting for 57% of Guangdong's total industrial output value.

In its attempt to upgrade the industrial structure of the Pearl River Delta (PRD), Guangdong discouraged further establishment of low value-added manufacturing industries which were labour and/or energy intensive. Measures had been taken to encourage existing industries in the PRD to engage in technology upgrade and innovation, or relocate to mountainous regions or the eastern/western parts of Guangdong.

As for the services sector which accounted for 43.8% of GDP in 2005, Guangdong aimed to further increase their overall relative share in GDP within the next five years. While development of the services sector would be expedited across the board, their structure would be optimised for Guangdong to develop into a regional financial centre, modern logistics hub in southern China, as well as an international business travel and shopping centre. Development of specific sectors such as wholesale and retail, logistics, finance, convention and exhibitions as well as business (professional) services will be strengthened and encouraged.

为提升经济发展，广东致力吸引跨国企业前来开设业务，又会采取措施吸引人才以落实经济提升计划。此外，广东会进一步改善港口、机场、物流园，以及与泛珠三角相邻省份的交通运输连系，藉以加强广东的区域运输和物流枢纽地位。

## 对香港服务业和制造业的影响

虽然现时只有少数香港公司有条件借助广东石化工业高速发展的机会拓展业务，但很多香港厂商已作好准备，把握汽车零部件业带来的新商机。广东发展重工业，一方面增加了对先进生产支援服务的需求，另一方面也衍生了一些下游业务的商机。

不过，在珠三角的香港制造业将面临更大的压力，须要提升技术和调整商业模式，方法之一是通过生产技术、设计、品牌、供应链管理等，为产品增值。至于选择迁往偏远地区的厂商，则希望当局能提供足够的基建设施和服务支援，让他们可以在供应链管理方面维持国际竞争力。

虽然广东欢迎香港的服务提供者通过CEPA进入广东市场，但部分有意到省内开业的香港服务提供者遇到一些实施上的问题。在广州设立CEPA落实跟进机制，会有一定的帮助。

随着越来越多厂商迁往珠三角以外的地区，香港的制造业支援服务可藉此机会拓展市场，考虑把握CEPA赋予的先行者优势，进军内地，以便紧贴客户，提供所需服务。



To facilitate its economic upgrading, Guangdong had been keen to attract multinational corporations to set up offices in the province. Measures would be taken to lure talents to support its upgrading plan. To strengthen its positioning as a regional transportation and logistics hub, Guangdong would further improve its ports, airports, logistics parks and transportation links with neighbouring provinces in the Pan-PRD region.

## Implications for Hong Kong Services and Manufacturing Industries

At present only a few Hong Kong companies were geared up for the opportunity arising from the rapid development of the petrochemical industry in Guangdong, but many Hong Kong manufacturers were poised to capitalise on the new opportunity in the autoparts industry. The development of heavy industries in Guangdong not only gave rise to demand for sophisticated manufacturing support services, but also generated downstream business opportunities.

However, there would be increasing pressure on Hong Kong's manufacturing industries in the PRD to upgrade their technology and adjust their business models. They could adjust by increasing the value-added component of their products through production technology, design, branding and supply chain management etc. For those which opted to relocate to remote areas, they would likely expect the provision of adequate infrastructure and services so as to maintain their international competitiveness in the supply chain management.

Whilst Hong Kong's service providers were welcomed by Guangdong to establish business under CEPA, some of them still encountered implementation problems in establishing commercial presence there. The establishment of a CEPA follow-up mechanism in Guangzhou would facilitate the process.

The relocation of manufacturing industries beyond PRD may give rise to new opportunities there for Hong Kong manufacturing support services providers. They should consider capitalising on the early entry advantage under CEPA, to firmly establish their presence in close proximity to their customers.

## 对香港作为大珠三角商业中心的影响

发展重工业和高新科技产业需要一系列支援服务，包括融资、设备租赁、工业及专业支援服务等。这将为香港的服务业创造无限商机。外国企业对于保护自有设计及／或科技的知识产权要求甚高，当会认同香港是设立地区办事处以服务广东以至全国市场的理想地点。

另一方面，香港将要面对新的挑战。香港的港口和物流设施以处理货柜为主，未能应付广东重化工业发展的需要。传统的轻工制造业迁离珠三角后，对香港物流设施的倚赖势将减少，加上广东的港口和机场急速扩张，将会加速货物分流，不经香港付运。2005年，香港货柜吞吐量只微升2%至2 240万标准箱，反观深圳同期的吞吐量则增长19.1%至1 620万标准箱。业界普遍预期深圳的吞吐量将于两、三年内超越香港。

广东省内既有制造业集群，又有大量土地供应，长远而言将有力威胁香港贸易展览之都的地位。事实上，买家直接从内地采购和海外公司把采购办事处由香港迁往内地的情况正不断增加。内地进一步开放贸易后，相信越来越多香港的贸易相关活动会转往珠三角。香港要维持国际贸易中心的地位，就必须汇集更多优质的国际及内地买家和供应商，而自由港亦将继续是香港的独特优势之一。

虽然改善跨境交通、加快清关和降低成本肯定会有帮助，但长远而言香港显然仍难与广东在海运业务上竞争。中期展望，香港在物流方面的优势主要在于空运，特别是针对高增值货品（包括广东工业所需的贵价零部件）的物流运输。

## Implications for Hong Kong as the Business Hub of the Greater Pearl River Delta

The development of heavy and high-tech industries required a wide range of supporting services including capital financing, equipment leasing as well as industrial and professional support services. Foreign companies that required good intellectual property protection of their proprietary design and/or technology, would find it advantageous to set up their regional headquarters in Hong Kong to oversee Guangdong and Mainland market. Numerous opportunities would thus be available for the services sector in Hong Kong.

On the other hand, there would be new challenges to Hong Kong. Hong Kong's ports and logistics facilities were primarily developed for containers and cannot cater for the logistics needs of heavy and petrochemical industries. The relocation of traditional light manufacturing industries from the PRD would reduce their reliance on Hong Kong's logistics facilities. This, coupled with the rapid expansion of ports and airports in Guangdong, would accelerate cargo diversion from Hong Kong. In 2005, the total container throughput handled by Hong Kong ports rose by only a modest rate of 2% to 22.4 million TEUs, while that of Shenzhen rose by 19.1% to 16.2 million TEUs. It was anticipated that Shenzhen's throughput would surpass Hong Kong's in 2-3 years' time.

Guangdong, as the home to manufacturing clusters together with abundant land supply, might also challenge Hong Kong's status as trade fair capital in the long run. Direct sourcing from the Mainland and the relocation of overseas companies' buying offices from Hong Kong to the Mainland had been on the rise. With the enhanced liberalisation of trade in the Mainland, it was expected that more and more trade-related activities in Hong Kong would be drawn to the PRD. Hong Kong must therefore, expand its critical mass of quality international as well as Mainland suppliers and buyers, so as to maintain its position as the international trading hub. A free port would remain one of our distinct advantages.

Notwithstanding the above, it was apparently difficult for Hong Kong in the long run to compete in the maritime cargo business, though improvements in cross-boundary traffic, customs clearance and costs would definitely be helpful. Hong Kong's key advantage in logistics in the medium term would lie with its air cargo business, particularly in handling high value items (including high-value parts and components for industries in Guangdong).

## 对香港长远发展的影响

广东加快发展高档工业和重工业，推动生产低增值消费品的厂户迁出珠三角，对香港的经济转型有深远影响。假如香港的制造业未能提升和转型，服务业又不能应付广东产业结构转型所产生的新需求，香港的主要经济支柱(如港口、贸易平台等)长远可能会被边缘化。

## 建议

为配合广东的经济转型和把握由此衍生的商机，香港的制造业厂商、服务提供者和有关方面应探讨和密切留意：香港有何专门知识可转移成为广东新产业生产链中的一环，以及广东需要何种新服务以支援产业结构转型。

为协助香港的制造业和服务业调整，并支援广东的经济转型，本研究建议广东省政府：

- 在转型过程中，给予香港企业与广东企业同等的政策支援和市场机会；
- 优先鼓励现存企业提升科技水平和创新能力；
- 在转型过程中，加强与香港在人才培训和研发方面的合作；以及
- 在海外推广上，与香港合作推广大珠三角相对于内地其他区域所具备的竞争能力。

体制和人力资本是香港两项最宝贵的资源，因此本研究建议香港特区政府：

- 吸引更多人才：  
除加强和提升香港的教育和培训外，香港特区政府应采取下列措施，增加香港对海外专才和高级管理人员的吸引力：
  - 进一步提高生活质素，包括改善空气质量、增加国际学校学位等；
  - 简化海外和内地专才到香港工作和居留的出入境手续；
  - 简化拥有香港居留权的外国雇员进出广东的过境手续；
  - 加快兴建运输网络，接驳广东的快速客运铁路及其他跨境运输服务；以及
  - 与广东商讨增发粤港私家车牌照。

## Long Term Impact on Hong Kong's Future

Guangdong's latest move to expedite development of the higher-end and heavy industries and to push production of low value-added consumer goods out of PRD would have a significant long term impact on Hong Kong's economic restructuring. Should Hong Kong's manufacturing industries fail to upgrade or transform, and Hong Kong's services industries fail to adapt to the new demand arising from Guangdong's restructuring, key support of Hong Kong economy, such as its ports and trade platform etc. could be marginalised in the long run.

## Recommendations

To cater for the restructuring of Guangdong and to capitalise on new opportunities arising therefrom, it would be worthwhile for Hong Kong's manufacturers, service providers and relevant parties to explore and monitor which and how Hong Kong's expertise could be transferred as part of the production chain in Guangdong's new industries, and what new services would be needed to support Guangdong's restructuring.

To facilitate adjustment of Hong Kong manufacturing and services sector, and to support Guangdong's economic restructuring, we proposed the following suggestions to the Guangdong government:

- to provide Hong Kong enterprises and their Guangdong counterparts with parity treatment in policy support and market opportunities in the course of restructuring;
- to accord priority to upgrade existing enterprises' technology level and innovation capability;
- to increase cooperation with Hong Kong in manpower training and R&D in the restructuring process; and
- to collaborate with Hong Kong in overseas promotions on the competitiveness of the Greater PRD vis-à-vis other regions in the Mainland.

Institutional strengths and human capital were considered as the two most valuable resources of Hong Kong. In this connection, we recommended the following to the HKSAR Government:

- Attracting more human resources:*  
Besides strengthening and enhancing Hong Kong's education and training, the HKSAR government should enhance our attractiveness for overseas professionals and senior managers by:
  - improving the quality of life including air quality and availability of international school places;
  - simplifying immigration procedure for overseas and Mainland experts to work and reside in Hong Kong;
  - simplifying immigration procedure for foreign employees with right of abode in Hong Kong to enter Guangdong;
  - speeding up the construction of transportation networks with links to Guangdong's express passenger railway as well as other cross-boundary transportation services; and
  - working with Guangdong on issuing more cross-boundary private vehicle licences.

b. 整合技术：

借助香港在保护知识产权、资讯流通和金融服务的优势，把香港发展为技术整合中心，即吸引高科技企业来港，并推动把新科技应用在工业上。

本研究促请香港的商会：

- a. 向会员解释广东产业结构转型带来的挑战和需要适应转变(包括提升技术水平)；及
- b. 鼓励会员积极制定策略，以改革经营模式，提升生产力和产品档次，为产品增值。

要维持香港作为服务平台和物流枢纽的地位，必须提高跨境货流、人流和资金流动的效率，同时降低有关成本。在海关合作检查跨境货物方面，现时香港与内地个别城市(如深圳和东莞)已有特定安排，已于香港港口检查的货物无须在香港／内地的边境管制站再次检查。这个"直通"的概念既省时，又能提高效率和降低成本。

此外，要扩大本港商业的规模，增强香港成为地区总部的吸引力，我们必须借助内地的"走出去"政策，吸引内地(特别是广东)公司来港进行国际采购和集资等活动。

b. *Technology integration:*

To develop Hong Kong as a technology integration hub by leveraging on Hong Kong's advantages in IPR protection, information flows and financial services, i.e. to attract high-tech enterprises to Hong Kong and to promote the conversion of new technology to application solutions.

We urged the trade associations of Hong Kong to:

- a. communicate with their members on the challenges arising from Guangdong's industrial transformation and their need to adapt to the changes, including to upgrade their level of technology; and
- b. encourage their members to actively develop strategies to revamp their business models, increase productivity, upgrade their products and increase the value-added component in their products.

To maintain Hong Kong's position as a service platform and logistics hub, it was important to increase the efficiency and reduce the costs of cross-boundary flow of goods, people and capital. One area of customs cooperation was cargo inspection. Arrangements had been in place between Hong Kong and several cities in the Mainland (such as Shenzhen and Dongguan) where goods inspected in Hong Kong ports need not be further inspected at the Hong Kong/Mainland boundary control points. This concept of "through transportation service" would increase efficiency and reduce costs and time.

To expand the critical mass of businesses in Hong Kong and strengthen its attractiveness as a preferred location of regional headquarters, it was also necessary to capitalise on the Mainland's "Going Out" policy to attract Mainland companies (in particular those from Guangdong) to set up operations in Hong Kong to conduct international sourcing and raise funds etc.



# 珠三角西部的发展 及其与香港的合作前景

## The Development of Western Pearl River Delta and its Prospects of Cooperation with Hong Kong

**近**年，广东省政府积极发展珠三角西部的城市<sup>1</sup>，并不断加强区内的基础设施，加强与香港、澳门及珠三角东部的交通联系，相信珠三角西部未来将会有快速发展，并会为香港带来机遇与挑战。因此，香港必须了解珠三角西部的发展路向，从而探讨应如何把握商机，并配合区内的发展。

### 珠三角西部的发展优势及限制

经过多年的迅速发展，珠三角东部地区正面临成本高、土地和能源匮乏以及劳动力短缺等问题。珠三角西部地区拥有丰富土地资源，亦可提供较充足及低廉的劳动力，为珠三角的未来发展提供新的动力和空间。

珠三角西部亦是通往粤西和泛珠三角西南四省区的门户，而西南四省区是西部开发政策的关键区域和中国与东盟合作的连接地带。发展珠三角西部，可以带动粤西和泛珠三角西南省区的发展。

从产业集群的现状看，西部在家电、五金机械等传统产业方面有优势，并形成了一批以这些产业为核心的特色小镇。此外，西部在发展旅游业、商贸业、加工工业、港口和航空服务业方面有广阔的空间。在经济结构上，西部地区则是以本土资本为主，民营经济发达，自主创新能力强。

另一方面，珠三角西部与香港的陆路交通直接联系较为缺乏。而在水路联系方面，货物经水路从珠三角西部的主要港口到香港至少需要24小时(包括装卸货柜的时间)。同时，珠三角西部在基础设施建设方面，亦较东部缓慢。广珠东线高速公路仍未全线通车、广珠西线高速公路及广珠铁路亦有待兴建。这些交通限制，影响了香港在珠三角西部地区的投资。

*In* recent years, the Guangdong Government has been actively developing cities in western Pearl River Delta (PRD)<sup>1</sup>. Sustained efforts have been made to improve the infrastructure of the area and also to strengthen its transport links with Hong Kong, Macao and eastern PRD. It was therefore envisaged that the western PRD would develop rapidly, bringing about both opportunities and challenges to Hong Kong. Against this background, Hong Kong should be fully aware of the future development of western PRD and map out strategies to capture the business opportunities and complement the development of the area.

### Development Advantages and Constraints of Western PRD

After years of rapid development, eastern PRD was now facing the problem of high cost as well as shortage in land, energy and labour. Conversely, western PRD had an abundant supply of land and cheaper labour, which could provide fresh impetus and enormous development opportunities for PRD in the future.

Western PRD was also the gateway to western Guangdong and the four southwestern provinces/region of Pan-PRD, the latter being the target areas under the "Go West" Policy and the Mainland's platform for cooperation with adjoining ASEAN countries. It was envisaged that the development of western PRD could help fuel the growth of western Guangdong and the southwestern provinces/region of Pan-PRD.

In terms of industrial clusters, western PRD enjoyed advantages in traditional industries such as household appliances, metalware and machinery. A number of towns specialising in these industries had been developed. In addition, the region presented enormous development opportunities for tourism, trade and commerce, processing industries, as well as port and air services. As regards its economic structure, western PRD mainly relied on domestic investment and had a flourishing private economy which had considerable strength in innovation.

<sup>1</sup> 本研究采用广东省在珠三角各项规划中对西部(西岸)、中部和东部(东岸)的范围划分，即将珠三角西部视为珠海、中山和江门三市，同时兼顾佛山及肇庆两市的发展。

<sup>1</sup> This study adopted Guangdong's delineation of the western (PRD West), central and eastern (PRD East) parts of the PRD region in its various plans for PRD, i.e. the western PRD is considered to cover Zhuhai, Zhongshan and Jiangmen. Foshan and Zhaoqing also fall within the ambit of this study.

## 珠三角西部的发展对香港的影响

### 香港应积极"向西看"，抓住先机

港珠澳大桥的发展，将拉近香港与珠三角西部的距离，为珠三角西部各市带来巨大的发展机会的同时，亦拓展了珠三角的经济腹地和发展空间。而且，西部地区是大珠三角连接粤西和中国西南地区的门户，西南地区又与越南、柬埔寨等东盟国家紧密相连。因此，香港应抓住珠三角西部发展的机遇，利用这个"跳板"，将香港的腹地进一步拓展至中国西南地区甚至东盟国家。

根据广东省的规划，珠三角西部将重点发展综合服务功能和依托于港口运输的临港工业（如能源、重化工及机械工业）、高技术的医药微生物工程、旅游业、物流业和以物资转运为主的港口贸易等第三产业。另外，珠三角西部民营经济发达，不少民营企业正积极准备"走出去"，香港可在珠三角西部城市的民营企业"走出去"的过程中扮演重要角色。



However, direct road links between Hong Kong and western PRD were relatively weak. For water transport, it took at least 24 hours to ship cargoes from major ports in western PRD to Hong Kong (time for loading and unloading of container included). Western PRD also lagged behind its eastern counterpart in infrastructure development. The Guangzhu East Expressway had yet to be fully operational, while the construction projects of the Guangzhu West Expressway and the Guangzhou-Zhuhai Line were still on the drawing board. Transport constraints had held back investments from Hong Kong in western PRD.

### Impact of Western PRD Development on Hong Kong

#### **Hong Kong should set its eye on the west and seize the emerging opportunities ahead of others**

The Hong Kong-Zhuhai-Macao Bridge would shorten the distance between Hong Kong and western PRD. It would bring along enormous development opportunities for western PRD cities while extending the economic hinterland of the whole PRD region. Western PRD was also the gateway between GPRD and western Guangdong as well as Southwest China, which bordered with ASEAN countries like Vietnam and Cambodia. Hong Kong should seize the opportunities arising from the development of western PRD, by leveraging on the region as a springboard to make further inroads into southwest Mainland and the ASEAN countries.

According to Guangdong's plan, western PRD would accord priority to developing integrated services and port-dependent industries (such as energy, heavy and chemical industries and mechanical industry), high-tech medical microbiology as well as tertiary industries such as tourism, logistics and harbour trade based on transshipment of material supplies. Besides, many of the well-developed private enterprises in western PRD were actively preparing themselves to "go global", and Hong Kong could play a key role in the process.

## 香港在珠三角西部的投资领域

香港过去在珠三角的制造业投资以“前店后厂”为主要模式。然而，广东省近年提出调整产业结构的策略，积极发展重工业、高新技术产业和服务业，轻加工制造业在未来广东省产业结构中的重要性将逐渐减弱。香港必须充分利用CEPA，拓展在香港优势产业(如金融服务、生产服务、资讯服务等)领域的投资，积极配合并充分利用广东省产业结构的转化，找到在大珠三角产业链中的位置。

重化工业、钢铁、汽车制造等都是珠三角西部重点发展的产业；香港的金融服务、企业管理、信息和各种专业服务等方面可以发挥所长，积极配合这些产业的发展。而在高新技术产业方面，香港与珠三角西部各具优势，亦可加强合作，包括帮助珠三角西部企业吸收外来技术，及协助国外高新技术产业到珠三角西部投资。

此外，在某些制造业，例如食品加工业、钟表、珠宝、制药等行业，“香港制造”品牌在内地市场有很强的吸引力。这些行业可充分发挥内地市场对香港品牌的信心，在珠三角西部建立生产基地，并开发内地市场。

## 鼓励珠三角西部企业来港发展

珠三角西部地区民营经济发达，越来越多具备一定规模和实力的民营企业开始谋求规范化、国际化经营，并希望迈向国际市场。但是，民营企业在这个过程中遇到不少融资、风险管理、拓展市场等的问题。香港可以在这些方面发挥所长，以发达的金融业和商贸服务，以及丰富的国际经验，协助西部地区民营企业开拓国际市场。

香港特区政府及商界应采取不同形式，积极推介香港的营商环境，针对西部地区民营企业的文化特色，提供个性化服务，让他们适应在港发展；并可针对个别有较高机会来港经营的行业的民营企业进行重点推介。

## Hong Kong investments in western PRD

In the past, Hong Kong's investments in PRD's manufacturing industry mainly took the form of "front shop and back plant". With Guangdong's shift towards heavy industries, innovative and high-tech industries as well as services industries in recent years, light processing industry would become less important in Guangdong's industrial structure. It was essential for Hong Kong to make the best use of CEPA and explored more investment opportunities for Hong Kong's competitive industries such as financial, production-related and information services, and to attune to and capitalise on the economic restructuring of Guangdong with a view to finding a niche in the GPRD's production chain.

Hong Kong should make the best use of its advantages in financial, corporate management, information management and other professional services to facilitate the development of priority industries in western PRD including heavy chemical industries, iron and steel, as well as automobile manufacturing. On the development of high-tech industries, Hong Kong and western PRD differed in strengths and there was scope for closer cooperation. For example, Hong Kong could help enterprises in the western PRD to import foreign technologies and entice offshore investment from overseas high-tech industries to the region.

For some manufacturing industries such as food processing, watch and clock, jewellery and pharmaceutical, the "made in Hong Kong" tag was well-received in the Mainland market. Building on the market confidence in their brands, these industries could set up production operation in western PRD and further expand their markets in the Mainland.

## Encouraging western PRD enterprises to set up business in Hong Kong

Western PRD had a thriving private sector. More and more large and well-established enterprises aimed to become more organised and internationalised. They also set their eyes on the international markets. In the process, however, they had been confronted by difficulties in financing, risk management and marketing. Hong Kong could provide them with staunch support in opening up international market, by capitalising on its advantages in financial and business services as well as ample international experience.



## 科技、教育与人才培训合作

珠三角西部的迅速发展，亦带来对各类管理人才（包括高质素技术、半技术及专业人才）的迫切需求。香港可从教育及人力资源培训的角度推动珠三角服务业的发展。另外，可透过教育与人才培训，把香港金融、贸易、航运物流、旅游等国际专业学会的联系和标准引进西部地区，并推动国际法律、知识产权、品牌信誉等价值观培训。

具体而言，粤港两地政府可考虑加快在人力资源的合作，将人力资源培训开放的时间表适度提前，并分阶段、规模化引进香港优质培训资源。此外，两地政府应积极统筹两地人力资源开发，鼓励培训资源多元投入，并考虑组建大珠三角教育及人力资源资讯中心，建立相关专业人才数据库。

The HKSAR Government and the local business community should adopt proactive measures and various means to promote the business environment of Hong Kong to private enterprises in western PRD, and help them set foot in Hong Kong by providing them with customised services specific to their business culture. Special promotion efforts should also be targeted at enterprises from sectors which were likely to set up business in Hong Kong.

### **Cooperation in technology, education and manpower training**

Rapid development in western PRD had given rise to a great demand for management expertise (including high-skilled, semi-skilled and professional expertise). Hong Kong could help promote the development of PRD's services industry through its relevant education programmes and human resources training, and introduce to the operators in western PRD its linkages with various international professional institutions and their prescribed standards in relation to finance, trading, shipping and logistics, as well as tourism. Training on subjects such as international law, intellectual property, brand names and goodwill could also be offered.

In more concrete terms, both governments could consider expediting cooperation in human resources training by properly advancing the timetable for opening up the training markets, and bringing in quality training resources from Hong Kong in phases and in a structured manner. They should also be more proactive in coordinating the development of human resources in the two places, encourage inputs of training resources from diversified sources and consider setting up an education and human resources information centre in GPRD and a database of relevant professionals.

## 总结

现今，香港与珠三角西部展开更深层次、更广范围的合作的时机已成熟。香港与珠三角西部城市在投资和合作策略方面，应积极探索两地分工协作的新模式，和重点拓展在优势产业内的投资，拓展香港制造业品牌优势，并可在帮助珠三角西部民营企业走出国门拓展海外市场、及与广东省推动科技、教育与人才培训方面的合作。

总结以上分析，本研究对香港特区政府、广东省政府、及香港商界提出以下一系列建议：

### 香港政府

- 及时了解和传递珠三角西部城市的经济、社会、文化发展、分析对香港可能产生的影响及带给香港的机遇与挑战，协助港商了解珠三角西部营商环境，以洞悉先机；
- 主动了解珠三角规划、计划的制定，配合并推动区域经济融合；
- 主动接触珠三角西部各市的地方政府，鼓励香港企业与其沟通；
- 消除香港与珠三角西部之间阻碍人流、物流、资金流的壁垒；
- 积极推动连接香港与珠三角西部的基础设施的建设；
- 帮助香港商界了解珠三角西部企业的资料，包括业务性质、规模、未来发展计划、需要何种服务等；
- 帮助提高珠三角西部企业及社会了解香港服务业的优势，及香港可以为内地企业提供服务；及
- 加强在珠三角西部的代表网络，向外积极推介香港，向内为在珠三角西部的港商提供服务。

## Summing Up

It was time for Hong Kong and western PRD to foster more intensive and extensive cooperation. Hong Kong and cities in western PRD should proactively work out new collaborative models in investment and cooperation strategies, make concerted efforts to attract investments in competitive industries, and efficiently exploit the brand names of Hong Kong's products. Hong Kong should also assist private enterprises in western PRD to go global and tap into overseas markets, and forge cooperation with Guangdong in technology, education and manpower training.

Based on the above analyses, we put forth the following recommendations to the HKSAR Government, Guangdong Government and the business community of Hong Kong:

### HKSAR Government

- Collate and disseminate, in a timely manner, information about the latest economic, social and cultural development in western PRD cities; to assess their possible impacts on, together with the opportunities and challenges brought to, Hong Kong in order to give an up-to-date account of the business environment in western PRD to the local business community;
- Take initiatives to get a handle on PRD's development plans and programmes with a view to facilitating regional economic integration;
- Take initiatives to liaise with the municipal governments of western PRD cities and encourage Hong Kong enterprises to maintain communication with them;
- Remove barriers blocking the smooth flow of passenger, cargo and capital between Hong Kong and western PRD;
- Promote vigorously the development of infrastructural links between Hong Kong and western PRD;
- Enhance the understanding of Hong Kong business community on enterprises in western PRD, including nature of their operation, scale of operation, future development plan and type of services required;
- Familiarise western PRD enterprises and community with the advantages of Hong Kong's services sector and the range of services available; and
- Strengthen the network of representative offices in western PRD to promote Hong Kong vigorously to Mainland enterprises and provide necessary services to Hong Kong enterprises in western PRD.

## 广东省政府

- 建设政府服务平台，提高政府服务效率和质量；
- 消除珠三角西部与香港之间阻碍人流、物流、资金流的壁垒；
- 积极推动连接珠三角西部与香港的基础设施的建设；
- 增强珠三角西部发展相关规划、策略、政策的透明度，加强相关信息释放的准确性、及时性和全面性，
- 对外来投资作出清晰指引；及
- 帮助珠三角西部企业及社会了解香港服务业的优势，了解香港可以提供的服务；并协助香港服务业在珠三角西部的发展。

## Guangdong Government

- Establish a government services platform to improve the efficiency and quality of the services provided by the government;
- Remove barriers blocking the smooth flow of passenger, cargo and capital between western PRD and Hong Kong;
- Promote vigorously the development of infrastructural links between western PRD and Hong Kong;
- Enhance transparency of development plans, strategies and policies of western PRD, and improve release of information in terms of accuracy, timeliness and coverage;
- Draw up clear guidelines for foreign investors; and
- Familiarise western PRD enterprises and community with the advantages of Hong Kong's services sector and the range of services available, and provide assistance to Hong Kong's services sector in their development in western PRD.

## 香港商业团体

- 在投资的地域方面，更积极地发掘珠三角西部、乃至粤西、大西南的发展潜力；
- 通过各种渠道积极了解珠三角西部独特的优势与劣势、当地的发展规划、计划、策略及吸收外资的政策，制订有针对性的投资策略；
- 在投资的领域方面，一方面积极拓展香港制造业品牌优势；另一方面开拓在金融、物流、生产和专业服务等香港优势领域内的投资，并根据珠三角西部城市的需求提供量体裁衣的服务；
- 积极接触珠三角西部的民营企业，了解其特征、发展计划、面对的问题和所需的服务，利用香港的各种优势帮助珠三角西部的民营企业开拓海外市场；及
- 与珠三角西部各市开展科技、教育与人才培养方面的合作。

## Hong Kong business community

- For investment in geographical terms, step up efforts to explore the development potentials of western PRD, as well as western Guangdong and Southwest China;
- Get a thorough understanding, through all possible channels, about the distinct strengths and weaknesses of western PRD and its development plans, programmes, strategies as well as policies on attracting foreign investment, for the formulation of target-oriented investment strategies;
- In terms of specific investment, develop actively the brand names of Hong Kong manufacturing industries on one hand, and promote investment for our competitive industries like financial, logistics, producer and other professional services on the other. Tailor-made services should also be provided to meet the service needs of western PRD cities.
- Approach private enterprises in western PRD proactively to know more about their operation, development plans, problems and service needs, while drawing on our competitive advantages to assist them in going global; and
- Embark on cooperation with western PRD cities in technology, education and manpower training.

# 工作小组报告

## Reports of the Sub-groups

# 跨境人流物流工作小组

## Cross-boundary Passenger and Cargo Flow Sub-group

### 工作目标及范围

**小**组的工作是就促进粤港澳两地人流、货流通关具体措施提出改善建议，目的是提升大珠三角作为一个经济体的整体营商效率。

### 工作进度及意见

小组曾讨论的议题包括加强内地海关报关运作的灵活性、广东省内陆车检场作业模式、“一地两检”及“检入不检出”方案、发展莲塘口岸和改善陆路整体通关效率等。

去年小组的工作集中两方面：

#### 1. 提升货运跨境过关的效率：

- i. 小组提出多项建议，短期措施包括简化货车报关程序、海关取消午饭及晚饭停关的安排、以及落实执行并加大宣传已经放宽的“四上四落”规定。商界也支持这些建议，亦透过工业总会渠道，向广东省领导提出，并得到他们正面回应，表示会就建议进行可行性研究。
- ii. 小组也讨论了一些中/长期措施的建议，包括实行“一地两检”、“检入不检出”、开办跨境直升机载客服务，和改变控制跨境私家车流量的方式。小组将就这些建议搜集更多资料，再决定跟进的先后次序。

### Objective and Scope of Work

**To** advise on measures to improve clearance arrangements for smoother passenger and cargo flows between Hong Kong and Guangdong, with a view to enhancing the overall efficiency in business operation of the GPRD as an economic entity.

### Work Plan and Suggestions

The Sub-group had discussed a wide range of issues including more flexible declaration procedures at the Mainland customs, the operation mode of inland vehicle examination centres in Guangdong, the “co-location” and “arrival clearance only” customs arrangements, development of a new boundary crossing point at Liantang, and enhanced operational efficiency at land boundary crossings, etc.

Last year, the Sub-group focused its efforts on two areas:

#### 1. Enhancing the efficiency of cross-boundary cargo clearance:

- i. the Sub-group put forth a number of proposals. Near-term measures include streamlining the declaration procedures for cargo trucks, removal of suspension of customs clearance during meal breaks, implementing the relaxed “four-up-four-down” rule and mounting a larger publicity drive on the relaxation. The proposals received support from the business community and were put forward to the Guangdong leadership through the Federation of Hong Kong Industries. The Guangdong side was positive towards the suggestions and indicated that feasibility studies on the proposed measures would be conducted.
- ii. the Sub-group also discussed some medium/long-term measures including implementation of the “co-location” and “arrival clearance only” customs arrangements, introduction of cross-boundary helicopter passenger services, and a new mode of control on the cross-boundary flow of private vehicles. The Sub-group would collect more information on these proposed measures before working out the priority for follow up actions.



## 2. 新增跨境口岸：

- i. 小组认为广东省东部持续发展，加上泛珠三角区域合作的展开，香港与粤东地区及福建、江西等地的联系将会增加。按照目前粤港两地人流、货流增长的趋势，现时三个跨境口岸，加上即将开通的深港西部通道，也未必能够应付未来的需求。因此，小组建议两地政府应及早筹划兴建新的跨境口岸，而选址以香港东面地区为佳。
- ii. 2005年10月，小组邀请了规划署讲解发展莲塘/香园围新口岸的研究和进展，并在今年2月底邀请了十多个行业商会的代表，听取他们的意见。会上，大部分人士都认为香港应善用深圳的发展所提供的机遇，加强交通联系，对深港两地都有好处。虽然现时的交通流量未必很大，但规划的眼光要放远，才能应付长远需要。
- iii. 小组很高兴特区政府积极研究这个建议。在去年九月政务司司长许仕仁与深圳许宗衡市长举行的深港合作会议上，双方同意成立联合研究小组，探讨相关问题，包括分析跨境交通流量、和新口岸对各方面的影响。我们希望两地政府能尽快就具体的计划和时间表达成共识。

## 2. Developing new boundary crossing point:

- i. the Sub-group considered that continuous development in eastern Guangdong and progress in Pan-PRD regional cooperation would lead to closer interaction between Hong Kong and eastern Guangdong, Fujian and Jiangxi. The existing three boundary crossing points, coupled with the Hong Kong-Shenzhen Western Corridor to be commissioned, might not be able to cope with the anticipated demands arising from the projected growth in traffic. The Sub-group therefore proposed that the two governments should make early planning for a new boundary crossing point, preferably on the eastern side of Hong Kong.
- ii. At its meeting in October 2005, the Planning Department briefed the Sub-group on the study and progress of developing a new boundary crossing point at Liantang/Heung Yuen Wai. The Sub-group convened another meeting in late February 2006 to gauge views from representatives of more than 10 trade associations. Most of them agreed that Hong Kong should capture the opportunities arising from the development of Shenzhen and strengthen transport connection. This would be a win-win solution. Even though the current traffic flow might not be that large, planning should be made with long-term demand in mind.
- iii. The Sub-group was pleased to note that the HKSAR Government had been actively studying the above proposal. At a meeting to discuss Hong Kong/Shenzhen cooperation held in September 2005, the Chief Secretary for Administration, Mr Rafael Hui and the Mayor of Shenzhen, Mr Xu Zongheng agreed to set up a joint study group to examine relevant issues such as to analyse the cross-boundary traffic flow and various implications of the proposed boundary crossing points. It was hoped that a consensus could be reached between the two governments as soon as possible on the concrete plan and implementation schedule for the project.

## 未来工作

工作小组将继续与粤港两地政府的相关部门，就已提出的建议进行商讨，例如深港西部通道开通后的过境安排，包括跨境车辆的安排、接驳交通、人货通关安排等事项。此外，小组也会开展新的研究课题。

## 结语

珠三角地区工贸活动近年持续高速发展，粤港两地经贸关系愈来愈密切，深港跨境运输也日趋繁忙，要加快大珠三角地区的经济融合、强化这个地区的竞争力，必须尽快提升深港跨境人流和物流的效率，以确保大珠三角经济能够持续发展，进一步巩固其作为"世界工厂"的地位。小组期望粤港政府共同致力发展大珠三角地区基础建设，简化通关程序和改善口岸设施，好让大珠三角地区充分发挥对国家经济发展的作用。

## Future Work

The Sub-group would continue to work with the relevant HKSAR and Guangdong authorities on the above proposals. Among others, it would deliberate on the cross-boundary measures to be introduced upon the commissioning of Hong Kong-Shenzhen Western Corridor, including the arrangements concerning cross-boundary vehicles, feeder transport service, as well as passenger and cargo clearances. In addition, the Sub-group would embark on study of new topics.

## Conclusion

The PRD has witnessed sustained rapid growth in industry and commerce in recent years. This, coupled with closer economic and trade tie between Hong Kong and Guangdong, has resulted in an increasingly heavy cross-boundary traffic flow between Hong Kong and Shenzhen. To expedite economic integration in GPRD and enhance the competitiveness of the whole region, it is important to improve the efficiency of passenger and cargo flows between Hong Kong and Shenzhen with a view to maintaining sustained economic growth in the GPRD and further consolidating its position as a "world factory". The Sub-group hoped that the HKSAR Government would work in collaboration with the Guangdong Government on infrastructure development in the GPRD, streamlining clearance procedures and improving control point facilities, hence setting the stage for the GPRD to function fully as a powerhouse for the economic development of the Mainland.

# 落实CEPA服务业合作工作小组 Services-Implementation of CEPA Sub-group

## 工作目标及范围

**工**作小组集中研究服务行业进入内地市场的安排及实施进度，工作目标包括研究如何加强推广CEPA、了解及建议如何解决服务提供者在广东省开业时遇到的困难，及研究专业服务在广东省发展的前景及问题等。

## 工作进度及意见

过去一年，工作小组探讨了CEPA实施以来的效益、对专业服务业带来的机会，以及服务业在CEPA框架下进入广东省市场所遇到的限制，尤其是个别专业例如建筑、工程行业及医疗服务业等。

小组认为，在CEPA的框架下，粤港服务业的合作空间很大，但服务界特别是专业服务界，在进入内地市场方面仍然面对一定困难。小组提出了以下几个原因：

### 1. 业界对内地法规不熟悉

香港服务提供者一般对内地法规并不熟悉，加上内地某些政策透明度不高，申请开业手续繁复，因此在办理开业时遇到不少困难。例如在医疗界，内地医生一般在医疗机构工作，私人执业情况并不普遍。在内地开办医疗机构，除需要一定的开业资本外，申请手续也相当繁复。

### 2. 两地制度不同，开业门槛仍高

在会计界，在内地执业除了要符合在内地连续居住三个月的条件外，还要取得专业考试合格。有业界反映专业考试相当困难，加上开业门槛仍高，因此中小型的会计师事务所难以在内地开业。即使个别行业的专业资格可以互认，在开业时仍可能遇到其他问题。例如在建筑专业，内地采用建筑、结构及其他相关行业综合营运的模式，有别于香港一般的单一专业模式，对申请开业构成困难。工程及规划等行业也遇到类似问题。

## Objectives and Scope of Work

*The* Sub-group focused on the arrangements and implementation progress for services sector to enter into the Mainland market. It aimed to explore means to step up promotion of CEPA, identify problems encountered by service suppliers in starting a business in Guangdong and suggest possible solutions, as well as to assess the prospects and possible problems for professional sectors to develop in Guangdong.

## Work Progress and Suggestions

Over the past year, the Sub-group had examined the benefits CEPA had brought about since its implementation, the opportunities offered to professional sectors, and the constraints confronted by the services sector in accessing the Guangdong market under the CEPA framework, with particular reference to professions such as construction, engineering and healthcare services.

The Sub-group was of the view that there was plenty of room for cooperation between services sectors in Hong Kong and Guangdong under CEPA. Nevertheless, the services sector, especially the professional sectors, had encountered difficulties in their access to the Mainland market. The Sub-group had identified the following reasons:

### 1. Inadequate knowledge on Mainland laws and regulations

Service providers from Hong Kong were generally unfamiliar with Mainland laws and regulations. Coupled with the low transparency of certain policies and the complicated application procedures, the situation had posed hurdles to starting business in the Mainland. Take the healthcare sector as an example, medical practitioners in the Mainland were generally employed by medical institutions and private practice was uncommon. In addition, medical practitioners were required to have a substantial start up capital and to go through complicated procedures in setting up a medical institution in the Mainland.

小组认为可通过推广合作和加强沟通，让相关业界加强把握和发挥CEPA带来的商机。广东省和香港在交通、商贸、资讯、人流和物流方面关系最为密切，因此小组认为广东省可以作为开拓内地市场的台阶。具体建议包括：

1. 香港和广东省应加强沟通和合作，提高政策和规例的透明度，简化申请开业的手续，加强推广宣传，令业界更了解CEPA提供的机会及便利。
2. 广东省可改善其"一站式服务"，以协助香港企业在广东省内开业。粤港两地提供申请开业服务的机构应多加沟通，了解双方的服务需求，以提高服务品质。

2005年5月11日，工作小组与香港专业联盟及粤港澳民间合作机制下的粤方服务业合作研讨小组办了座谈会，讨论香港专业进入广东省市场的机遇和方法。工作小组及香港专业联盟安排了内地官员到访，向香港专业人士讲解在广东开业的手续。座谈会反应热烈，与会人数高达百多人，加深了香港专业界对广东开业情况的了解。



## 2. Institutional differences between Hong Kong and the Mainland and high entry threshold

For the accounting professionals to qualify for practice in the Mainland, one must pass the professional examination and meet the Mainland residence requirement for 3 consecutive months. Some members of the profession considered the examination difficult and that the entry threshold unduly high. Small and medium accounting firms therefore found it difficult to start up business in the Mainland. For some other sectors, though mutual recognition of qualifications was in place, they still encountered other problems when trying to establish business in the Mainland. Take the architectural sector as an example. The Mainland adopted a multi-disciplined mode of business involving architecture, structural engineering and other related professions. This mode posed difficulty for architectural firms in Hong Kong to apply for business operation in the Mainland, as they operated on a mono-professional basis in Hong Kong. Other professions, like engineering and planning, also run into similar problems.

The Sub-group considered that the services sector can better seize the business opportunities presented by CEPA through enhanced cooperation and communication. The Sub-group also considered that Guangdong could serve as a platform for Hong Kong to tap the Mainland market, given that the Province has the closest tie with Hong Kong in terms of transport link, trade and commerce, information exchanges as well as passenger and cargo flows. Concrete recommendations for this purpose include:

1. Hong Kong and Guangdong should step up communication and cooperation, enhance the transparency of relevant policies and regulations, streamline application procedures for business operation and intensify promotional efforts to enhance operators' awareness of the opportunities and facilitation offered by CEPA.
2. The Guangdong Province may refine its "one-stop service" to facilitate Hong Kong enterprises in setting up business there. The organisations in Guangdong and Hong Kong offering services for business applications should enhance their communication to enhance mutual understanding of the demand for their service in order to raise service quality.

## 其他意见：

- 过去二十年，深圳经济特区曾带头推行多项改革，小组认为深圳市可以作为试点，率先推行较简化的程序及较宽松的处理政策协助香港服务业在深圳开业。深圳市政府表示，欢迎香港的服务业，特别是保险业、投资银行业及证券服务业等金融服务业到深圳开业。
- 在开发珠三角西部市场方面，香港可担任中介角色，作为内地及有意在珠三角西部投资的外商之间的桥梁，一方面协助外商进入内地，另一方面为内地企业提供品牌管理、行政及传销等服务。
- 香港专业服务业更可为珠三角发展蓬勃的民营企业提供服务，协助他们到香港发展。
- 在医疗界别方面，建议香港特区政府考虑作出推动，协助业内人士与内地磋商，要求内地简化申请程序，并协助香港医疗机构在内地设立分部。为了早日取得内地批准香港医生以私人名义执业，香港应游说广东试行放宽有关规定。

On 11 May 2005, the Sub-group co-hosted a seminar with Hong Kong Coalition of Professional Services and the Guangdong Services Cooperation Sub-group under the Hong Kong/Guangdong private sector cooperation, to discuss the opportunities for Hong Kong professional sectors to enter the Guangdong market and the avenues available. Mainland officials were invited to explain to local professionals the procedures of setting up business in Guangdong. The seminar was well-received with more than 100 participants, and successfully enhanced the understanding of the Hong Kong professional sectors in this respect.

## Other Comments

- In the past 20 years, the Shenzhen Special Economic Zone had spearheaded a wide array of reforms. The Sub-group considered that a pilot scheme can be carried out in Shenzhen, in which simplified procedures and relaxed policies could be put in place to facilitate Hong Kong's services sector to establish business in Shenzhen. The Shenzhen Municipal Government had indicated that Hong Kong's services sector was welcomed to set up business in Shenzhen, especially financial services such as insurance, investment banking and securities.
- In respect of market expansion in western PRD, Hong Kong may serve as a bridge between the Mainland and foreign investors interested in western PRD. Hong Kong can assist foreign enterprises to enter into the Mainland, while providing services such as brand management, administration and direct sales to Mainland enterprises.
- Hong Kong's professional services sector may also render services to the growing private enterprises in western PRD, facilitating them to start up business in Hong Kong.
- In so far as the medical sector is concerned, it is suggested that HKSAR Government should assist the medical professions to hold discussions with the Mainland authorities on streamlining relevant application procedures, and to set up sub-offices in the Mainland. In order to secure approval from the Mainland for Hong Kong medical practitioners to set up private practice as soon as possible, the HKSAR Government should consider lobbying Guangdong for a pilot relaxation of relevant regulations.

## 未来工作

工作小组会与政府及有关机构继续跟进以下事项:

1. 探讨协助服务业和专业服务业人士进入广东省市场的方法，并向粤港政府反映有关情况，争取放宽进入内地市场的条例。
2. 研究如何跟进旅游、文化及体育工作小组的建议，争取将旅游服务纳入CEPA内，让香港旅行社可以在内地经营。
3. 两地政府应继续沟通，尽量简化手续，方便香港服务业进入广东省市场。
4. 探讨如何把握广东省经济急速发展的机会，开发商机，并协助及支持广东省发展服务行业。

## Future Work

The Sub-group would continue to take forward the following initiatives with the governments and relevant organisations:

1. to explore means to facilitate the services sector and the professional sectors to enter the Guangdong market, and to reflect the situation to both the Guangdong and HKSAR governments, with a view to relaxing regulations on access to the Mainland market;
2. to study how to follow up recommendations of the Tourism, Culture and Sports Sub-group, with a view to incorporating tourism services into CEPA and allowing Hong Kong's travel agents to set up business in the Mainland;
3. to urge the two governments to enhance communication with each other and streamline procedures where possible, so as to facilitate the access of Hong Kong's services sector into the Guangdong market; and
4. to identify ways to capitalise on and seize new business opportunities brought about by the rapid economic development of Guangdong Province, as well as to facilitate and support the development of services industry in the province.





# 可持续发展工作小组

## Sustainable Development Sub-group

### 工作目标及范围

**可**持续发展工作小组认为应积极加强香港与广东的合作，将可持续发展概念贯彻在大珠三角社会当中，以配合大珠三角迅速的经济增长，为两地社会的长远而全面的发展建立良好的根基。

工作小组非常关注区域性空气污染及两地人流交往增长的发展。因此，小组认为必须改善区域性空气质素，及关注港人在大珠三角城市生活/工作所需的支援服务。

### 工作进度及意见

为了达致上述目标，可持续发展工作小组在过去一年举行了四次会议，邀请了政府部门、研究机构代表、商会代表等出席会议，就如何改善空气质素的问题进行探讨。此外，小组于去年七月前往广州，与粤方可持续发展小组举行会议，就双方关心的议题交流意见。小组去年的工作重点包括：

#### 1. 改善区域性空气污染

小组认为现时大珠三角地区的环境污染问题日趋严重，尤其是空气方面，并同意首要工作是改善珠三角地区的空气质素。大珠三角的人口及工业增长速度十分惊人，要改善区内的空气质素，香港必定要与广东省加强沟通，以及建立官、商及民三方的合作，方能达致成效。

##### i. 清新空气约章

大珠三角商务委员会、香港总商会、香港商界环保大联盟、广东省贸促会及广东省环保产业协会合作在2005年11月20日举行的清新空气日，推出《清新空气约章》。香港厂商会及广东省贸促会更协助在大珠三角城市向企业派发这份约章，并鼓励在当地设厂的两地厂家以身作则，自发性地采取措施，减少排污，以改善空气质素。

### Objective and Scope of Work

**The** Sustainable Development Sub-group aimed to proactively promote closer cooperation between Hong Kong and Guangdong in order to achieve sustainable development in GPRD in tandem with its rapid economic growth. This would provide a solid foundation for the long-term and comprehensive development of the two places.

The Sub-group was highly concerned about regional air pollution and growth in people flow between the two places, and considered it necessary to improve the air quality in the region and keep a close watch on the support services for Hong Kong people living/working in GPRD cities.

### Work Plan and Suggestions

To achieve the above objectives, four meetings were held in the past year, to which representatives from government departments, research institutions and business associations were invited to provide input on means to improve air quality. The Sub-group also visited Guangzhou in July last year and had a meeting with its Guangdong counterpart to exchange views on issues of common interest. In the past year, the Sub-group focused its efforts on the following areas:

#### 1. Reducing regional air pollution

The Sub-group considered that environmental pollution in the GPRD, especially air pollution, was worsening and agreed that improvement of regional air quality should top the list of working priorities. In view of the exponential growth of population and industries in the GPRD, Hong Kong must strengthen its communication with Guangdong and build up a tripartite cooperation among government, business sector and the general public in its drive to improve regional air quality.

##### i Clean Air Charter

The Greater Pearl River Delta Business Council, Hong Kong General Chamber of Commerce (HKGCC), Hong Kong Business Coalition on the Environment, CCPIT Guangdong Sub-Council and the Guangdong Environmental Protection Industries Association jointly launched the Clean Air Charter on the Clean Air Day on 20 November 2005. The HKGCC and the CCPIT Guangdong Sub-Council also assisted in distributing the Charter to enterprises in GPRD cities and encouraged both Hong Kong and local manufacturers there to set a good example by taking emission reduction measures voluntarily to improve air quality.

## ii. 清洁生产示范计划

小组正与环保署讨论，探讨能否透过推广技术示范计划，提高广东省内港资的生产制造行业，对节省能源、减少排废、应用清洁生产等的认识。并向大珠三角地区的企业介绍清洁生产措施，以期提高企业的社会责任意识，并于大珠三角深化落实可持续发展及环境保护的概念。

## iii. 减少汽车排废及燃油质素控制

汽车燃料及车辆尾气排放亦是珠三角城市的一个主要空气污染源头。香港政府在2006年开始对新登记车辆实施欧盟四期排放标准。相对来说，广东省地方较香港为大，广东省政府正争取落实在珠三角城市提前推行国III型(相等于欧盟三期)机动车尾气排放标准。因此，在粤港合作改善空气质素方面，小组正积极向广东省反映，希望广东省也可尽早把废气排放标准提升至国IV型(相等于欧盟四期)的标准。并同时提高燃油品质标准。

## 2. 促进社会融合发展

为进一步探讨现时港人在内地生活的现况，小组邀请了政府部门，向委员简介现时居住或长期逗留在内地的香港居民的特徵，及是否有利用香港的社会服务。小组认同要掌握长期逗留在内地的港人数目及向有关人士进行调查是存有一定的困难，但为了促进与内地的港人建立更深厚的联系及了解他们的需要，小组认为政府及有关机构应该就有关议题进行更深入的探讨。

## 未来工作

在改善区域性环境污染方面，小组将继续与政府部门及各方专业进行交流，探讨如何引进专业技术的支援，加强两地政府的合作及推动商界的支援，一方面致力于大珠三角城市落实推动清洁生产，另一方面推展汽车尾气排放/汽车燃料的管制工作。

在促进两地社会融合发展方面，小组希望香港政府可以现时的资料为基础，再作进一步的详细分析。小组同时建议香港与内地合作进行调查，以便可接触长期逗留在内地而没有回港的人士，进一步了解这些港人的需要。

### ii Clean Production Demonstration Scheme

The Sub-group was exploring technology demonstration projects with the Environmental Protection Department (EPD) in order to raise the awareness of Hong Kong manufacturers in Guangdong on energy saving, emission reduction and application of clean production technology. The Sub-group also intended to familiarise GPRD enterprises with clean production practices. The objective was to strengthen their sense of social responsibilities for sustainable development and environmental protection in GPRD.

### iii Reduction of vehicle emissions and control of fuel quality

Vehicle fuels and emissions were one of the major sources of pollution in GPRD cities. The HKSAR Government has already introduced Euro IV emission standard to all newly registered vehicles from 2006. While the Guangdong Province is geographically larger than Hong Kong, its government is still seeking to advance the implementation of the National III (equivalent to Euro III) emission standard in PRD cities. In this connection, as part of an effort to promote Hong Kong/Guangdong cooperation on air quality improvement, the Sub-group was taking vigorous action to reflect the situation to the Guangdong Provincial Government in the hope that it would raise its emission standard to National IV (equivalent to Euro IV) as soon as possible and upgrade the quality standard of vehicle fuels.

## 2. Facilitating social inclusion

To better understand the current situation of Hong Kong people living in the Mainland, relevant government departments were invited to give a briefing to the Sub-group on the characteristics of Hong Kong people living/staying substantially in the Mainland and their utilisation of the social services of Hong Kong. The Sub-group acknowledged the difficulties in assessing the number of and conducting survey on Hong Kong people staying substantially in the Mainland. Nevertheless, in order to maintain a closer linkage with Hong Kong people living in the Mainland and gain a better understanding on their needs, the Sub-group considered it necessary for the governments and relevant organisations to carry out in-depth studies.

## Future Work

The Sub-group would continue to exchange views with government departments and professional bodies on the elimination of regional environmental pollution. It would explore how to secure professional technical input, strengthen cooperation between the governments of both sides and enlist support from the business sector, in order to achieve clean production and strengthen control of vehicle emissions/vehicle fuels in GPRD cities.

For promoting social inclusion of the two places, the Sub-group suggested the HKSAR Government to conduct detailed analysis on relevant available data. The Sub-group also suggested a joint survey by Hong Kong and the Mainland on Hong Kong people who stayed substantially in the Mainland without returning to Hong Kong, in order to better understand their needs.

# 联合投资贸易推广工作小组 Joint Investment and Trade Promotion Sub-group

## 工作目标及范围

**在** 商务委员会2004/05年报中总结工作时，联合投资贸易推广工作小组指出由于涉及的事宜非常广泛，所以小组应与广东省小组订定清晰的方向和共同的目标，并集中处理几个重要范畴。

商务委员会其后委托工作小组负责研究有关吸引内地民营企业来港的事宜，这是商务委员会在2004/05年度三个主要研究课题之一。此外，工作小组决定与粤方小组加紧合作，进一步向广东企业推广香港的投资环境。

## 工作进度及意见

### 1. 吸引广东省投资者来港

工作小组就香港中央政策组与广东省发展研究中心进行的《鼓励广东民营企业到香港发展业务研究》提供意见。

这项研究于2005年年底完成。据研究的其中一项发现，约四分一(24%)的广东民企正计划出外成立公司或办事处，其中三分二表示香港是他们属意的地方。

工作小组和商务委员会已详细考虑研究报告的内容。研究的主要发现之一，是现时粤港两地有多个机构协助广东民企到香港开业<sup>1</sup>。工作小组建议建立平台，统筹资讯发放和推广活动，藉以整合工作，提升效率。这个平台亦可发挥下列作用，使各方的工作更有成效：

## Objectives and Scope of Work

**In** the Council's 2004/05 Annual Report, the Sub-group concluded that due to the diverse nature of issues involved, it was important to develop, together with the Guangdong side, a clear direction and shared goals on the way forward, focusing on a few key areas.

Since then the Council has delegated to the Sub-group one of the three subjects being considered in 2004/05, namely, attracting Mainland private enterprise to Hong Kong. The Sub-group has also decided to work more closely with the Guangdong counterpart to further promote the investment environment in Hong Kong to Guangdong enterprises.

## Work Progress and Suggestions

### 1. Attracting Guangdong investors to Hong Kong

The Sub-group contributed to a study that was undertaken by the Hong Kong Central Policy Unit in conjunction with the Guangdong Development Research Centre on "Encouraging Guangdong Private Enterprises to set up Business in Hong Kong".

The study, completed in late 2005, found among other things, that about one-quarter (24%) of private enterprises in Guangdong were planning to set up companies or offices abroad. Among them, two-thirds had indicated Hong Kong as the preferred location.

The Sub-group and the Council had studied the report in detail. One major findings was that currently many Hong Kong and Guangdong organisations were involved in helping Guangdong private enterprises establish operation in Hong Kong.<sup>1</sup> The Sub-group recommended that this should be rationalised through the establishment of a platform to coordinate dissemination of information and promotional activities to achieve better results. In addition, this platform can amplify the effort by various parties by:

<sup>1</sup> 这些机构包括贸易发展局、投资推广署、中国国际贸易促进委员会广东分会，以及多个商会等。

<sup>1</sup> These organisations included Trade Development Council, Invest Hong Kong, Chinese Council for the Promotion of International Trade - Guangdong Sub-Council, and various chambers of commerce.



- i. 提高广东企业的认知；
- ii. 加强现时协助企业开拓业务工作(如培训活动)的功效；
- iii. 集中运用额外资源，如推行更持久的传媒推广计划，或者由商会举办更切合企业需要的支援活动；
- iv. 让广东企业更容易取得有关香港的资讯；及
- v. 协助不同机构合作，促进彼此的工作，达到"整合机构"的目的。

## 2. 内地商人移居计划

工作小组认为，对于有意来港开业又拟举家移居香港的内地企业家来说，可以在港居留具有一定的吸引力。因此，工作小组已主动与保安局和入境事务处磋商，研究是否有可行途径鼓励内地商人移居香港并在此开展业务。

## 3. 与粤方工作小组合作

工作小组在2004/05年度与粤方小组进行了初步接触，其后又与广东外商投资企业协会黄志炜先生担任组长的粤方小组举行了多次会议。双方同意为了整个地区的长远利益着想，应持续合作，联手推广贸易与投资。

2005年9月，两个小组在广州合办赴港投资宣讲会，向有意来港的珠三角民企介绍香港，共有超过200名准投资者参加，反应热烈。出席者认为内容非常适切实际。在工作小组的协助下，部分有意投资者其后更组成考察团，于2006年来港实地考察，与本港政府部门和商界会晤，了解来港开业的具体问题。

- i. raising awareness of Guangdong enterprises;
- ii. enhancing the effectiveness of current capacity-building programmes such as training activities;
- iii. providing a focus for investing additional resources, e.g. a more sustained media campaign, or customised supporting activities by chambers of commerce;
- iv. improving Guangdong enterprises' access to information on Hong Kong; and
- v. facilitating "institutional integration" by bringing various agencies together for cooperation.

## 2. Immigration scheme for Mainland business people

The Sub-group considered that the prospect of residing in Hong Kong would be attractive to Mainland entrepreneurs who might wish to set up business in Hong Kong and at the same time, relocate their family here. The Sub-group has initiated an exchange of views with the Security Bureau and Immigration Department on possible avenues to encourage Mainland business people to relocate to Hong Kong and set up business here.

## 3. Working with Guangdong counterpart

Following initial contacts in 2004/05, the Sub-group held several meetings with its Guangdong counterpart headed by Mr Huang Zhiwei of the Guangdong Association of Enterprises with Foreign Investment. The two sides agreed to join hands to promote trade and investment through a sustained joint effort, for the long term interest of the whole region.

In September 2005, the Sub-group co-organised a seminar in Guangzhou with its Guangdong counterpart to introduce Hong Kong to private enterprises in the PRD, which were interested in setting up business in Hong Kong. The seminar was well received with over 200 potential investors taking part. Participants found the seminar very practical and relevant. Subsequently, some of the potential investors formed a delegation to Hong Kong in 2006, supported by the Sub-group, to meet with the HKSAR government and the business sector on practical aspects of setting up business in Hong Kong.

## 未来工作

展望来年，工作小组会继续单独或与粤方合作进行计划和研究，向海外市场推广大珠三角地区，以及致力吸引广东企业来港开业。有关工作包括：

1. 与粤方小组加强合作，在珠三角城市合办赴港投资宣讲会，并接待广东的投资考察团；
2. 继续探讨为所有协助广东企业"走出去"的推广机构建立共用平台；
3. 研究方法，改善现时向在港的珠三角企业提供支援服务；以及
4. 与入境事务处跟进以协助更多内地商人和专业人士移居香港。

## Future Work

In the year ahead, the Sub-group would continue to undertake projects and studies, both on its own and together with Guangdong, to promote the GPRD region to overseas markets and to attract Guangdong enterprises to set up business in Hong Kong. They include:

1. to step up cooperation with Guangdong side in organising promotional seminars in PRD cities on setting up business in Hong Kong, as well as receiving delegations of potential investors from Guangdong;
2. to continue to explore the establishment of a common platform for all organisations involved in facilitating Guangdong businesses "Going Out";
3. to examine ways to improve the current support services provided to PRD enterprises in Hong Kong; and
4. to follow up with the Immigration Department on facilitating more Mainland business people and professionals to relocate to Hong Kong.



# 科技、教育及人力资源工作小组

## Technology, Education and Human Resources Sub-group

### 工作目标及范围

**就** 促进粤港两地在科技、教育及人才资源培训方面合作：

1. 提出政策及策略上建议；
2. 推动两地的私营机构作更进一步合作；及
3. 与广东省及各主要城市就有关范畴建立更紧密的联系。

### 工作进度及意见

#### 教育及人才培训

小组去年详细研究及分析了粤港在科技、教育及人才资源培训的现行合作情况。

经多次讨论及与香港特区政府有关部门交流意见后，小组完成了把教育加入《内地与香港建立更紧密经贸关系安排》第三阶段(CEPA III)的建议报告，呈交教育统筹局，并向工商及科技局作出详尽介绍。鉴于中央政府暂未开放教育服务，建议未获纳入CEPA III。

粤港在人才培训合作方面，在去年取得进展。在多方面推动下，香港工业总会与惠州市商业学校在去年签署产学合作项目，提供工商业所需职业培训，为大珠三角职业培训踏出重要一步。

### Objectives and Scope of Work

**The** Sub-group aimed to:

1. advise on policies and strategies;
2. forge closer cooperation between the private sectors of both places; and
3. establish closer ties with the Guangdong Province and its major cities

for the promotion of Hong Kong/Guangdong cooperation in technology, education and human resources development.

### Work Progress and Suggestions

#### Education and human resources training

In the past year, the Sub-group studied in detail the current cooperation between Hong Kong and Guangdong in technology, education and human resources development.

After discussions and exchange of views with relevant departments of HKSAR Government, the Sub-group developed a proposal on the inclusion of education services into Closer Economic Partnership Arrangement (CEPA) III. The proposal was submitted to the Education and Manpower Bureau and the Commerce, Industry and Technology Bureau was fully briefed as well. However, the proposal had not been incorporated into CEPA III as the Central Government had yet to open up education services in the Mainland.

There was progress in manpower training cooperation between Hong Kong and Guangdong last year. Thanks to the joint efforts of various parties, an industrial/academic cooperation agreement was signed between the Federation of Hong Kong Industries and the Huizhou Business School on the provision of vocational training for the industrial and commercial sectors. This marked an important step in the development of vocational training in the GPRD.

## 设计及科技合作

香港设计中心于2005年11月举办"亚洲风尚 – 设计营商周2005"大型国际会议，由世界首屈一指国际大师演讲，吸引大批国内设计人才经广州、东莞及深圳政府安排，到港参加会议并在品牌及设计教育范畴上作出重要交流。小组建议粤港可以在设计行业方面，增强沟通和人才交流。

在2006年3月21日，香港科技园亦与深圳高新区及西安高新区，就三方跨区域创新科技合作发展签署合作备忘录，成立联合服务平台，加强三方在资讯上之交流，扩展三方的技术资源及服务的辐射。小组认为此合作项目有利于两区发展。同时，小组应该在粤港两地科技合作事宜上，多搜集和了解类似的合作成果和障碍，以便进一步推动科技合作。

## 未来工作

小组将会继续探讨和推动与大珠三角在专业及职业培训的合作，包括深港科技合作、粤港教育及科技合作和创意产业合作等。



## Design and technological cooperation

Through arrangement by the Guangzhou, Dongguan and Shenzhen governments, a host of talented designers in the Mainland came to Hong Kong in November 2005 to attend Business of Design Week 2005: Lifestyle Asia, a major international conference organised by the Hong Kong Design Centre, featuring world-class designers as speakers. They had useful exchanges with other participants in the areas of branding and design education. In this connection, the Sub-group suggested enhancing communication and exchanges of human resources between the design sectors in Hong Kong and Guangdong.

On 21 March 2006, the Hong Kong Science and Technology Parks Corporation, the Shenzhen Hi-Tech Industrial Park and the Xi'an Hi-Tech Industrial Development Zone signed a memorandum of understanding on cross-regional collaboration and development in innovation and technology. Under the memorandum, a joint service platform would be set up to facilitate exchange of information and extend the radiating influence of their technological resources and services. The Sub-group believed that the joint initiative would be conducive to the development of Hong Kong and Guangdong. To enhance technological cooperation, the Sub-group considered that more researches should be conducted on similar collaboration projects so that lessons could be drawn in terms of their achievements and problems encountered.

## Future Work

The Sub-group would continue to explore and promote cooperation with the GPRD in professional and vocational training, including Hong Kong/Shenzhen technological cooperation and Hong Kong/Guangdong cooperation in education, technology and creative industries.



# 旅游、文化及体育工作小组

## Tourism, Culture and Sports Sub-group

### 工作目标及范围

小组的工作目标是就加强粤港澳旅游、文化和体育合作的政策和策略提供意见，藉以

1. 促进和便利粤港澳两地旅客互访；以及
2. 推动粤港澳两地文化艺术和创意设计的发展和合作，并促进两地人才资源的融合、本土经济发展和文化创新。

### 工作范围

1. 旅游：推动改善有关基建、交通设施、出入境手续及过境设施，以便与广东省不同地方连接起来，方便旅客来港或经香港前往其他海外的主要目的地；及
2. 文化：加强粤港澳两地在演艺活动和文化方面的合作和交流，并促进两地创意产业群聚区的发展。

### 工作进度及意见

#### 旅游

2005年，香港的旅游业持续稳健增长，访港旅客达2 300万人次，较之前一年上升7.1%。由2006年5月1日起，“个人游”措施延伸至内地44个城市，进一步覆盖泛珠江三角洲地区除下六个省会，有助进一步推高访港旅客人次，为旅游业带来裨益。

为进一步刺激旅客流量，小组专注探讨有关签证的事宜，包括：

1. 处理因内地多程出入境签证收费高昂，而影响了海外/商务旅客顺道来港的意欲；及
2. 便利持有有效澳门通行证的内地旅客在同一行程内来港旅游。

### Objectives and Scope of Work

*Objectives* of the Sub-group were to advise on policies and strategies pertaining to the enhancement of cooperation between Hong Kong and Guangdong in the areas of tourism, culture and sports so as to:

1. promote visitor flow between Guangdong and Hong Kong; and
2. promote development and cooperation between Hong Kong and Guangdong in the area of arts, culture and creative design, and to enhance integration of human resources, local economic development and cultural innovation in both places.

#### Scope of work

1. For tourism, the scope of work was to promote enhancement in relevant infrastructure, transport facilities, entry/exit procedures and cross-boundary facilities to better connect various parts of Guangdong and facilitate passenger flow both into Hong Kong and via it to other key overseas destinations; and
2. For culture, the scope of work was to promote cooperation and exchanges in performing arts and culture, and facilitate the clustering for creative industries in Hong Kong and Guangdong.

### Work Plan and Progress to Date

#### Tourism

Hong Kong's tourism industry continued to gain momentum in 2005, as visitor arrivals reached 23 million, representing a 7.1% growth compared with the previous year. With the extension of the Individual Visit Scheme (IVS) to the remaining six Pan-PRD provincial cities, Hong Kong had benefited from the increase in traveller flow under the expansion of the IVS to 44 cities from 1 May 2006.

To further boost tourism traffic, the Sub-group focused on visa-related issues including:

1. to tackle the negative impact of higher cost of multiple entry visa for overseas visitors/business visitors in the Mainland, who wish to visit Hong Kong as part of a trip to the Mainland;
2. to facilitate entry of Mainland visitors holding valid Macao permits to visit Hong Kong on the same trip.

此外，小组亦继续寻求有关部门的支持，以准许香港旅行社根据《内地与香港建立更紧密经贸关系安排》(CEPA)，在内地(尤其是广东省)，营办国内和国外旅行团。

## 工作进度

小组已经向相关的政府决策局提出有关事项，并与广东省旅游局跟进内地多程出入境签证收费影响海外旅客顺道来港旅游一事。广东省旅游局初步表示支持进行评估，以便研究是否可以调低签证收费，鼓励持有有效签证的海外旅客，在同一行程内顺道来港旅游。

小组亦已向有关部门提出，准许持澳门"个人游"通行证的内地旅客来港旅游，现正等候回覆。

另外，根据CEPA第三阶段的协议，香港旅行社和经营商须符合的资本额及每年总营业额已获调低，相信有助香港经营商在内地扩展业务。而香港旅行社在内地营办出入境旅行团的运作事宜，则会在CEPA的第四阶段下继续探讨。

## 文化

香港特区政府民政事务局，透过粤港澳艺文合作高峰会，继续与大珠三角地区的部门紧密合作，加强区内的文化交流，特别是有关演艺活动方面的交流和成立广东戏曲资料中心。

## 工作进度

小组配合了政府的有关工作，亦希望有关方面在促进社区艺术/文化团体(非政府团体)交流方面进一步努力。至于以长沙湾服装业群聚区为试点的建议，鉴于长沙湾工业大厦将于2006年底完成清拆，小组经商议后，同意由商务委员会进一步商讨在香港推动设计行业的构思，务求令香港在区内创意/设计行业不断发展的同时，继续保持其领先的优势。



In addition, the Sub-group continued to lobby for support from respective authorities to permit Hong Kong travel agencies to operate both inbound and outbound tours in the Mainland, in particular in Guangdong, under the CEPA arrangements.

## Work progress

The Sub-group raised the issues with relevant Government Bureaux, and also pursued with the Guangdong Provincial Tourism Bureau on the negative impact of higher cost of multiple visas on visitors conducting side trips to Hong Kong. The Guangdong Provincial Tourism Bureau indicated initial support to review the visa fees with a view to encouraging overseas visitors holding valid passport to travel to Hong Kong on the same trip.

The subject of permitting Mainland visitors with valid IVS permits to visit Macao to also visit Hong Kong was raised with the relevant authorities and a reply is pending.

Under CEPA III agreement, the required paid up capital and annual turnover for Hong Kong's travel agencies and operators were lowered. The new arrangement would facilitate the expansion of business operation by Hong Kong operators in the Mainland. The operation of both inbound and outbound tours in the Mainland would continue to be reviewed and discussed under CEPA IV.

## Culture

The Home Affairs Bureau of the HKSAR Government, through the GPRD Cultural Summit, continued its effort in working very closely with the GPRD authorities in enhancing cooperation in cultural exchange particularly in the area of performing arts and setting up of a Cantonese Opera information centre.

## Work progress

The Sub-group complemented the works of the Government, and hoped that more efforts could be invested in promoting cultural exchange of community-led arts/cultural groups (non-government groups). With respect to the proposal to pursue a garment industry cluster in Cheung Sha Wan as a pilot project, in view of the demolition of the Cheung Sha Wan Flatted Factories completed by end 2006, the Sub-group agreed that the Business Council should further pursue how to maintain Hong Kong's leading edge in the creative / design sector in the region.



## 结语

商务委员会于本年4月检讨了辖下各个工作小组的未来工作范畴，经商议后，同意将旅游、文化及体育工作小组的工作分别由跨境人流物流工作小组、服务业发展工作小组及科技、教育及人才资源工作小组跟进：

### 1. 跨境人流物流工作小组

- i. 跟进有关签证的事宜以促进人流，及文化交流；
- ii. 方便前往大珠三角地区的海外旅客顺道来港或前往大珠三角其他地点旅游；及
- iii. 方便持有有效签证的内地旅客来港旅游。

### 2. 服务业发展工作小组

- i. 就《更紧密经贸关系安排》第四阶段协议内，继续与有关部门联系。

### 3. 科技、教育及人才资源工作小组

- i. 加强大珠三角区"非政府"团体的文化交流；及
- ii. 促进于文化/创意工业，并巩固香港作为区内创意工业这类高增值工业中心的地位。

## Conclusion

In April 2006, the Business Council reviewed the future scope of work of various Sub-groups, and agreed that the initiatives of the Tourism, Culture and Sports Sub-group would be followed up by the Cross-boundary Passenger & Cargo Flow Sub-group, Service Industry Development Sub-group and the Technology, Education & Human Resources Sub-group, respectively:

### 1. Cross-boundary Passenger & Cargo Flow Sub-group

- i. visa related issues with a view to facilitating people flow and cultural exchange;
- ii. facilitating overseas visitors travelling to GPRD to conduct side trips to Hong Kong or to other GPRD areas; and
- iii. facilitating Mainland visitors holding valid visas to travel to Hong Kong.

### 2. Service Industry Development Sub-group

- i. continue to pursue with relevant authorities on CEPA IV agreement.

### 3. Technology, Education & Human Resources Sub-group

- i. Enhancing cultural exchange of GPRD 'non-government' groups; and
- ii. Promoting cultural/creative industries and reinforcing Hong Kong's status as the regional centre of high value-add industries such as creative industries.



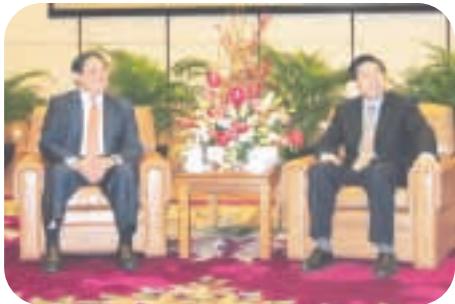
# 大珠三角商务委员会的对外联系

## External Liaison of the Greater Pearl River Delta Business Council



# 大珠三角商务委员会 的对外联系

## External Liaison of the Greater Pearl River Delta Business Council



**在**过去的一年，商务委员会积极与粤港政府、广东省贸促会及有关的商界组织、和两地的学术界商讨各议题和交流意见，亦与香港的主要商会，以及推广粤港合作的机构保持紧密联系。商务委员会非常感谢各机构对商务委员会工作的支持。

### 与粤港政府的联系

作为粤港合作联席会议框架下成立的组织，商务委员会及其工作小组不时与两地有关政府部门会面，就促进两地在投资推广、便利人流物流、环境保护和科技及教育发展等方面合作，商讨建议及交换意见。

商务委员会亦与两地政府高层会面，以报告工作进度并反映商界的意见，包括冯国经主席于2005年9月粤港合作联席会议第八次会议上，向两地政府汇报工作进度及介绍未来工作重点。

此外，商务委员会于2005年11月23日到广州与广东省省长黄华华会面，主席及委员向省长提出对粤港合作多个课题的意见，并得到省长的正面回应和支持。商务委员会亦在2005年9月6日与深圳市市长许宗衡会面，就加强深港合作交换意见。

*In* the past year, the Business Council exchanged views on various issues with the HKSAR and Guangdong governments, CCPIT Guangdong Sub-Council and relevant business organisations as well as the academic community in the two places. It also worked closely with the major chambers of commerce in Hong Kong and organisations involved in forging cooperation between the two places. The Business Council would like to thank these organisations for their support.

### Liaison with HKSAR and Guangdong Governments

As an organisation set up under the framework of the Hong Kong/Guangdong Cooperation Joint Conference (the Joint Conference), the Business Council and its Sub-groups met relevant government departments of both places from time to time to exchange views on cooperation proposals in a number of areas, including investment promotion, facilitating people and cargo flows, environmental protection, as well as technology and education.

The Business Council also reported its progress of work and relayed the concerns of business sector to senior officials of both governments. At the eighth plenary meeting of the Joint Conference held in September 2005, Council Chairman Dr Victor Fung reported work progress to HKSAR and Guangdong governments and gave a briefing on the Council's work plan.

On 23 November 2005, the Business Council met Governor Huang Huahua of Guangdong Province during a visit to Guangzhou. At the meeting, the Chairman and members put forward their views to the Governor on a wide range of issues relating to Hong Kong/Guangdong cooperation, and received positive response and support from the Governor. On 6 September 2005, the Business Council met Mr Xu Zongheng, the Mayor of Shenzhen, to exchange views on closer Hong Kong/Shenzhen cooperation.



## 与广东省贸促会的联系

商务委员会与广东省贸促会都是粤港合作联席会议框架下成立的商界组织，两会一直保持联系，共同推动务实的合作工作。

广东省贸促会于2005年8月组织企业考察团来港访问，了解在港营商的环境及有关问题。商务委员会接待了考察团并安排与相关的机构会面，包括香港贸易发展局及香港投资推广署等，以加深考察团对香港投资环境的认识。

## 课题交流

商务委员会去年成立了两个专责小组，分别研究广东省产业结构转型对香港工商界带来的机遇和挑战；和珠三角西部发展及与香港的合作前景。两个小组在今年初完成研究初稿后，在广东省贸促会的协助下，与广东省政府多个有关部门及学者，进行了坦率的交流。

## 工作小组联系

商务委员会的可持续发展工作小组在2005年7月，与广东省可持续发展小组举行了联合会议，商讨如何携手合作改善大珠三角地区的空气质量。在两个小组的努力下，广东省贸促会和商务委员会于2005年11月共同支持香港商界环保大联盟推动两地企业签署《清新空气约章》。

商务委员会的联合投资贸易推广工作小组于去年亦与广东省联合投资小组举行多次会议，并在2005年9月在广州举办“赴港投资实务宣讲会”，向超过200位广东省民营企业代表，介绍到香港开业的手续及香港的投资环境。参加者对宣讲会反应很好，两个小组计划安排有兴趣来港开业的企业到港考察，并会在今年在其他城市举办同类宣讲会，推动广东省企业来港开业。

## Liaison with CCPIT Guangdong Sub-Council

The Business Council and the CCPIT Guangdong Sub-Council, both set up under the framework of the Joint Conference, had stayed in close contact and worked in concerted efforts to take forward practical cooperation work.

In August 2005, a delegation of Guangdong enterprises organised by the CCPIT Guangdong Sub-Council visited Hong Kong to gain a better understanding of the local business environment and related issues. The delegation was received by the Business Council, and had meetings with relevant organisations such as the Hong Kong Trade Development Council and Invest Hong Kong to get a better understanding of our investment environment.

## Exchanges on various issues

In 2005, two task groups were set up under the Business Council to study respectively the opportunities and challenges posed to Hong Kong's industries and businesses in the face of Guangdong's economic restructuring; and western Pearl River Delta's development and prospects of its cooperation with Hong Kong. Following the completion of the first draft of the study reports earlier this year, the two task groups, with the assistance of the CCPIT Guangdong Sub-Council, met relevant authorities of the Guangdong Government and academics in the province for candid exchange of views on their findings.

## Liaison between Hong Kong and Guangdong Sub-groups

In July 2005, a joint meeting between the Sustainable Development Sub-group of the Business Council and the Sustainable Development Cooperation Sub-group of Guangdong was held to explore cooperation in improvement of air quality in the GPRD region. With efforts from the two Sub-groups, the CCPIT Guangdong Sub-Council and the Business Council pledged support in November 2005 for the promotion of Clean Air Charter among Hong Kong and Guangdong enterprises, as initiated by the Hong Kong Business Coalition on the Environment.

The Business Council's Joint Investment and Trade Promotion Sub-group also held a number of meetings with Guangdong's GPRD Investment and Trade Promotion Sub-group last year. In September 2005, they co-hosted the Hong Kong Investment Promotion Seminar in Guangzhou and briefed more than 200 representatives from Guangdong private enterprises on the investment environment and procedures for starting up business in Hong Kong. In the light of the positive response to the seminar, the two Sub-groups planned to organise prospective Guangdong enterprises to visit Hong Kong, and host similar seminars in other cities this year to encourage more Guangdong enterprises to invest in Hong Kong.



## 访问广东省及广西壮族自治区 (2005年11月23至25日)

商务委员会在2005年11月组成访问团，由冯国经主席率领，到广东省和广西壮族自治区作三天考察。考察团在广州拜会了黄华华省长，主席向省长简介商务委员会的研究课题及工作进度。在广东省期间，访问团参观了广州科学城，了解现时广州高新科技产业的发展。同时，访问团亦参观了花都区市容及花都机场的运作。

访问团随后转飞广西壮族自治区首府南宁市，拜会了自治区党委书记曹伯纯。主席除了介绍商务委员会的工作外，亦与曹书记就香港商界如何配合泛珠三角区域合作及桂港合作交换意见。在广西期间，代表团考察了钦州、北海和南宁三市的发展。这次行程，让商务委员会增进对广西的了解，亦有助委员会在研究促进粤港两地发展时可加强参考泛珠三角所提供的巨大腹地和商机。

## 与全国政协代表交流

商务委员会在2005年11月与全国政协经济委员会“珠三角地区经济协调发展专题组”会面，就珠三角地区的经济发展交流意见。

## Visit to Guangdong Province and Guangxi Zhuang Autonomous Region

(23 to 25 November 2005)

A delegation formed by the Business Council conducted a three-day visit to Guangdong Province and Guangxi Zhuang Autonomous Region under the leadership of Dr Victor Fung, the Council Chairman, in November 2005. The delegation called on Governor Huang Huahua in Guangzhou, during which the Chairman briefed him on the topical studies underway and the current work of the Business Council. During their stay in Guangdong, the delegation also visited Guangzhou Science City to gain a better understanding of the latest development of hi-tech enterprises in Guangzhou. It also visited Huadu district and observed the operation of the Huadu Airport.

The delegation then visited Nanning, the capital city of Guangxi Zhuang Autonomous Region, and called on Mr Cao Bochun, Party Secretary of the Region. The Chairman briefed him on the work of the Business Council, and they exchanged views on participation by the private sector at Pan-PPRD regional cooperation as well as Hong Kong/Guangxi cooperation. The delegation also visited Qinzhou, Beihai and Nanning and was briefed on their latest development. The Business Council gained a better understanding of Guangxi in the trip, which would enable the Council to take account of the extensive hinterland and business opportunities provided by Pan-PRD in promoting Hong Kong/Guangdong cooperation.

## Exchange with the Representatives of the Chinese People's Political Consultative Conference (CPPCC)

The Business Council met the Focus Group on Coordinated Economic Development of the PRD Region under the Economic Committee of CPPCC in November 2005, at which they exchanged views on the economic development of the PRD region.



## 商务委员会曾联系的主要机构和商会

## Major Organisations and Associations in Contact with the Business Council

政府部门 Government Departments	网站 Website	电邮地址 E-mail Address
工业贸易署 Trade and Industry Department	<a href="http://www.tid.gov.hk">http://www.tid.gov.hk</a>	enquiry@tid.gov.hk
投资推广署 Invest Hong Kong	(1) <a href="http://www.investhk.gov.hk">http://www.investhk.gov.hk</a> (2) <a href="http://www.thegprd.com.cn">http://www.thegprd.com.cn</a> (此网站由投资推广署及广东省对外贸易经济合作厅共同管理) (This website is maintained by Invest Hong Kong and Department of Foreign Trade and Economic Cooperation of Guangdong Province)	(1) <a href="mailto:enq@InvestHK.gov.hk">enq@InvestHK.gov.hk</a> (2) <a href="mailto:enq@InvestHK.gov.hk">enq@InvestHK.gov.hk</a> <a href="mailto:service@gddoftec.gov.cn">service@gddoftec.gov.cn</a>
香港驻粤经济贸易办事处 The Hong Kong Economic and Trade Office in Guangdong	<a href="http://www.gdeto.gov.hk">http://www.gdeto.gov.hk</a>	<a href="mailto:general@gdeto.gov.hk">general@gdeto.gov.hk</a>

有关机构和商会 Related Organisations and Associations	网站 Website	电邮地址 E-mail Address
香港旅游发展局 Hong Kong Tourism Board	<a href="http://www.discoverhongkong.com">http://www.discoverhongkong.com</a>	<a href="mailto:info@discoverhongkong.com">info@discoverhongkong.com</a>
香港贸易发展局 Hong Kong Trade Development Council	<a href="http://tdctrade.com">http://tdctrade.com</a>	<a href="mailto:hktdc@tdc.org.hk">hktdc@tdc.org.hk</a>
香港工业总会 Federation of Hong Kong Industries	<a href="http://www.fhki.org.hk">http://www.fhki.org.hk</a>	<a href="mailto:fhki@fhki.org.hk">fhki@fhki.org.hk</a>
香港中华厂商联合会 The Chinese Manufacturers' Association of Hong Kong	<a href="http://www.cma.org.hk">http://www.cma.org.hk</a>	<a href="mailto:info@cma.org.hk">info@cma.org.hk</a>
香港总商会 Hong Kong General Chamber of Commerce	<a href="http://www.chamber.org.hk">http://www.chamber.org.hk</a>	<a href="mailto:chamber@chamber.org.hk">chamber@chamber.org.hk</a>
香港中华总商会 The Chinese General Chamber of Commerce	<a href="http://www.cgcc.org.hk">http://www.cgcc.org.hk</a>	<a href="mailto:cgcc@cgcc.org.hk">cgcc@cgcc.org.hk</a>



