



## 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)。

### 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工作小组，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

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.

### 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的表达达成共识。

### 2. 落实CEPA服务业合作工作小组

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，自发地采取措施，减少排污，以改善空气素质。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。这个平台亦可以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. 教育及人才培养

小组详细研究及分析了粤港在科技、教育及人力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：

- a. 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。
- b. 准许持澳门“个人游”通行证的内地旅客可以顺道来港旅游。
- c. 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，继续保持其领先的優勢。

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建设。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、教育与人才培养方面的合作。

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.