

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¹，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专业镇。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)¹. 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.

1 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。

1 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)领域内的投资，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、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、教育与人才培养合作

珠三角西部的迅速发展，亦带来对各类管理人才（包括高素质技术、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养，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、教育与人才培养方面的合作。

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的服务；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和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。

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，了解其特徵、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、教育与人才培训方面的合作。

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.

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.