

主席報告

Chairman's Statement



香港與廣東省，特別是珠江三角洲地區，在社會、文化和經濟方面的聯繫一直密不可分。時至今日，港商在廣東開設的公司已超過8萬家，而香港在省內的累計實際直接投資額亦已超過1,000億美元(8,194億元人民幣)，兩地的密切關係由此可見一斑。

為了進一步發展和加強香港與珠三角的關係，大珠三角商務委員會於2004年3月成立，以民間機構的身分推動粵港合作，與香港特別行政區政府和廣東省政府的工作相輔相成。

這是商務委員會的第二份年報。作為商務委員會的主席，能夠在此與大家分享委員會對拓展和深化粵港合作的願景，實在深感榮幸。

在首屆任期內，商務委員會除在促進粵港經貿關係方面取得實質進展外，亦積極探討一些與兩地可持續發展有關的事宜。

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.



新的區域融合

區域經濟一體化已成全球趨勢。世界各地均湧現不同形式的區域協作，藉以增強地區的競爭力。國家自七十年代後期起推行經濟改革，不但把珠三角發展為主要的全球生產中心，同時通過貿易、投資及其他聯繫，使珠三角與國際逐步接軌。在這個轉變過程中，香港積極參與，大力推動，在經濟上也因而與珠三角日趨融合。

兩地融合促使珠三角擴大而成為大珠三角。在過去二十多年內，大珠三角(包括香港特區和澳門特區)取得驕人的發展，現已成為國家內其中一個最富裕、增長最迅速的地區，也是一個極具吸引力的市場。

不過，大珠三角雄厚的經濟影響力並不限於廣東省，還逐步擴展至鄰近11個省區。這11個省區組成的“泛珠三角”區域，成員包括廣東、廣西、湖南、海南、雲南、貴州、江西、福建和四川九個省區，及香港和澳門兩個特區。整個地區佔全國面積的五分之一，全國人口的三分之一以上，生產總值合共達到8,795億美元(72,066億元人民幣)。泛珠三角區域內各經濟體系的互補性很強，集合起來就成為競爭力強勁又積極進取的經濟實體。

由珠三角到大珠三角，再發展到現在的泛珠三角，清楚顯示地區一體化以至全球一體化已是大勢所趨。在《內地與香港關於建立更緊密經貿關係的安排》(CEPA)下，內地持續開放，加上國家加入世界貿易組織的相關改革，勢必促使泛珠三角內部進一步擴大貿易和投資，加速區域融合。我們深信這個融合的勢頭將會持續。

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組成的經濟同心圈中，香港與珠三角不斷融合，成為泛珠三角區域合作的核心。香港與珠三角優勢互補，亦帶動區內經濟強勁增長。

香港和珠三角日後可在多方面推動泛珠三角區域的發展。香港會繼續成為區內主要的金融中心、物流中心、貿易樞紐和服務出口中心。香港的主要優勢在於具備高效率的服務平台，服務範圍現已遍及整個地區。此外，香港亦已發展為日益重要的人才培訓基地，為國家開發人才資源，使內地的經濟能再闢高峯。本港八間大學和高等教育院校的學術成就舉世認同，在這方面發揮了重要作用。另一方面，隨着國際工業和服務業翹楚建立緊密的經濟群組，加上中小型企業在區內積極生產，使珠三角成為全球其中一個主要的製造業基地，並能夠靈活適應多變的市場狀況。

近年，珠三角與泛珠三角的關係無疑正不斷加強。而由於香港與珠三角關係密切，珠三角今後的發展將會對香港帶來深遠的影響。

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.





未來的挑戰和機遇

廣東的最新發展

過去五年，廣東推動產業結構轉型，致力發展重工業及高增值產業，預期在未來五年，省內的電子資訊、石化及汽車等產業將會急速發展。此外，省內的服務業亦出現強勁增長，而廣東已在“十一五”規劃中明言將於2006至2010年間加快服務業的發展步伐。另一方面，珠三角西部發展迅速，亦會促使省內部分產業遷往該處。

廣東的產業結構轉型和珠三角西部的高速發展定必會為香港帶來新的機遇。有鑑於此，商務委員會成立了兩個專責小組，探討這兩項發展為香港商界帶來的機遇和挑戰，以及評估對香港企業及投資者可能產生的影響。兩項研究的概要載於下面的章節。

鄰近城市的迅速發展

面對不少內地城市(尤其是珠三角城市)的迅速發展，香港正面對種種重大機遇和挑戰。舉例來說，正如廣東的“十一五”規劃所提出，很多珠三角城市將會加緊建設港口與道路。因此，我們或需因應珠三角這種急速的發展，重新審視本港作為地區物流樞紐的領導地位。

此外，最近社會輿論談到珠三角城市的高速發展會否引致香港被邊緣化的問題。香港必須密切留意整個地區可能出現的變化，並採取周全的措施，以維持本身的競爭力。

Challenges and Opportunities Ahead

New developments in Guangdong

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

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

Swift development of neighbouring cities

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

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

有何對策？

首先，香港必須強化本身的競爭優勢，鞏固支柱產業，包括金融服務、貿易、物流、工商業支援服務和旅遊業。香港是一個國際貿易金融中心，服務行業發展完善，很多內地及跨國企業均選擇在此設立地區總部。再者，香港可以善用本身國際化及高度自治的優勢，與大珠三角及泛珠三角的企業緊密合作，協助他們走向世界市場。

香港要鞏固和維持長遠的競爭力，就必須在主要的支柱產業保持領導地位。不過，香港的競爭力很大程度上取決於人才。容許更多的人才自由進出香港會提升我們的競爭力、吸引更多資金和創造更多就業機會。香港必須致力發展完善的通識教育、提供優質的高等教育，以及發展成為全球領先的研究中心之一。專才、企業家、學生或遊客匯聚香港後，自然會產生互動交流，激發創意，令香港受惠。

與此同時，香港的基建發展務須與泛珠三角互相配合。加強在基建規劃上的協調，有助加強香港與鄰近省區公路和鐵路網絡對接，對於提高效率起重要作用。港珠澳大橋若能早日落成，當可在這方面發揮極其重要的作用。

最後我要指出，香港要維持競爭力，另一個關鍵是必須確保在珠三角、廣東及更遼闊的腹地裏，發揮香港的優勢和作用。泛珠三角區域合作有助拓展本港的發展空間。通過加強香港與鄰近省區的合作，一方面可加快泛珠三角區內的人流、貨流和資金流動，更可吸引更多海外資金、技術、管理專才與其他人才流入，鞏固這個區域作為二十一世紀全國以至全球最蓬勃經濟中心之一的地位。

What Should be Done?

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

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

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

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

總結

香港是珠三角的長期伙伴，可以促進區內的經濟增長和發展，並因而從中大大得益。為了讓這個伙伴關係不斷發展，惠及兩地，長遠的計劃及協調工作必不可少。此外，我們須留意其他地區性問題，積極協作，謀求解決。就以污染問題為例，空氣質素每況愈下，不僅影響區內市民的健康和生活質素，亦有損大珠三角對海外投資者和旅客的吸引力。因此，粵港政府和民間機構必須攜手合作，採取前瞻性的措施，改善兩地空氣質素。我們必須緊記，地區融合並非單為了經濟利益和回報，也是為了達成一致目標和共同分擔責任。

區域合作是長期工作。我們必須努力不懈，開拓新的合作領域，並且抓緊每個契機，方可取得實質成果。我身為商務委員會的主席，定必會與全體委員緊密合作，尋求更多途徑，進一步拓展區域合作的空間。

鳴謝

我謹代表商務委員會，衷心感謝各位委員與事務主任盡心竭力為商務委員會服務；他們高瞻遠矚，見解精闢，並且不吝分享經驗，使委員獲益良多。我也要感謝秘書處人員不辭勞苦，對商務委員會的工作貢獻良多。最後，我要感謝粵港兩地政府，以及中國國際貿易促進委員會廣東省分會鼎力支持商務委員會的工作，促進粵港兩地的經貿合作。



大珠三角商務委員會主席
馮國經
二零零六年六月

Concluding Views

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

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

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Dr Victor Fung
Chairman
The Greater Pearl River Delta Business Council
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