

H O N G K O N G



**大珠三角商務委員會**  
**The Greater Pearl River Delta**  
**Business Council**



**2005 / 2006**

年報 Annual Report



# 大珠三角商務委員會

## The Greater Pearl River Delta Business Council

香港特別行政區行政長官

曾蔭權先生

曾先生：

本人謹代表大珠三角商務委員會各委員呈交商務委員會的2005/2006年報。

隨着香港的私營機構緊密參與廣東的經濟發展，商務委員會一直致力擔當粵港兩地民間機構的重要溝通橋樑，促進雙方商討粵港合作的事宜，並向兩地政府反映意見。

商務委員會自2004年成立後，已取得一定的成績，去年繼續再接再厲，集中研究有關大珠三角發展的主要事宜，包括便利跨境人流物流、吸引粵企來港、推動可持續發展，以及加強其他範疇的合作等。

**跨境人流物流：**跨境人流物流工作小組提出的主要建議包括：

- 為跨境貨運業提供更靈活的安排，如放寬"一車一司機"的規定(內地已於2005年9月28日落實放寬措施)；
- 延長持有沙頭角及文錦渡管制站封閉道路通行許可證的私家車於晚間使用落馬洲／皇崗管制站過境的時間；以及
- 長遠來說，在蓮塘興建新的陸路口岸。

**吸引粵企來港：**聯合投資貿易推廣工作小組與粵方小組合辦宣講會和考察團，向有意"走出去"的粵企介紹香港的營商環境。工作小組又探討如何向在港粵企加強支援服務。

**可持續發展：**2005年11月，可持續發展工作小組與中國國際貿易促進委員會(貿促會)廣東省分會、廣東省環保產業協會，以及香港商界環保大聯盟合力推出《清新空氣約章》，推動粵港兩地商界自發採取環保措施。

**旅遊及文化：**旅遊、文化及體育工作小組向兩地政府提出有需要減低旅客順道訪港的多程簽證費用，並建議准許持有效澳門通行證的內地旅客順道來港旅遊。

**落實CEPA：**落實CEPA服務業合作工作小組探討專業界別進入內地市場所遇到的困難，並提出推動落實CEPA的建議。工作小組又合辦座談會，以討論香港專業界別進入廣東市場的機會和途徑。

**科技、教育及人才培訓：**科技、教育及人才資源工作小組研究把教育服務納入CEPA，並考慮了多項與科技及人才培訓有關的措施。

除此之外，商務委員會又進行兩項研究，探討今後與廣東合作的方向，希望能把握廣東日後發展所帶來的機遇。

**廣東省產業結構轉型為香港帶來的機遇和挑戰：**廣東的經濟結構近年出現主要轉型，重點發展重工業和服務業。在"十一五"規劃下，這個發展趨勢將會持續，並對香港帶來重大影響。本港商界必須提升技術水平和改革經營模式，以配合廣東的最新發展。我們亦希望兩地政府可在基建和體制上提供所需的支援，協助私營機構適應轉變。

**珠三角西部的發展及其與香港的合作前景：**珠三角西部城市擁有深厚潛力，廣東省政府亦對發展西部甚表支持。為了協助商界到當地發掘商機，粵港政府應加快發展基建，促進人流物流，同時加強推動兩地的商業交流和發展。

商務委員會在推行工作期間，一直與兩地政府、廣東省貿促會及其轄下的小組保持良好的溝通。我們在未來會繼續加強這些工作聯繫。

衷心希望你繼續支持商務委員會的工作。



大珠三角商務委員會主席

馮國經

二零零六年七月三十一日

# 大珠三角商務委員會

## 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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## 珠三角最新發展情況

珠

三角經濟區包括廣州、深圳、東莞、佛山、江門、中山、珠海，以及惠州和肇慶的市區。雖然珠三角只佔全國土地面積的0.6%及普查人口的3.4%，但在2004年卻佔國內生產總值的9.8%、總出口的30.6%及在2003年佔全國實際利用外來直接投資的26.1%。

經過二十多年的發展，珠三角現時不但是世界工廠，亦是全球多種產品的主要採購基地。此外，珠三角亦發展了一批專業鎮，主要生產一種或多種特色產品。目前，廣東共有159個專業鎮。

隨著廣東省近來的產業結構轉型，珠三角的經濟結構亦出現重大轉變，重工業及第三產業所佔的經濟比重日漸增加。在各類重工業中，重化工、器材製造業、石化、鋼材和汽車製造業均發展迅速。於2004年，輕工與重工業比例為44.4比55.6，而第三產業佔地區生產總值的42.4%。

根據《珠江三角洲城鎮群協調發展規劃(2004至2020年)》，廣東省將會銳意加快提升珠三角的整體競爭力。未來數年，珠三角將重點發展農業生產、加工製造、臨港重工業、大型器材製造、高新技術產業、國際物流業和旅遊業。

## 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.





# 年報摘要 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)。

## 商務委員會

商務委員會的首屆任期為2004年3月1日至2006年2月28日。第二屆任期由2006年3月1日開始。商務委員會的主席由馮國經博士擔任，委員共有31人。

為了集中處理主要的課題，在過去的一年，商務委員會成立了六個工作小組，繼續致力研究粵港合作的主要範疇。六個小組包括：

1. 跨境人流物流工作小組
2. 落實CEPA服務業合作工作小組
3. 可持續發展工作小組
4. 聯合投資貿易推廣工作小組
5. 科技、教育及人才資源工作小組
6. 旅遊、文化及體育工作小組

商務委員會在去年也研究了兩個重要課題，並提出建議：

1. 廣東省產業結構轉型為香港帶來的機遇和挑戰
2. 珠三角西部的發展及其與香港的合作前景

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

## 工作小組的工作

### 1. 跨境人流物流工作小組

去年小組的工作集中兩方面：

#### i. 提升貨運跨境過關的效率：

小組提出多項短期措施，包括簡化貨車報關程序、海關取消午飯及晚飯停關的安排、以及落實執行並加大宣傳已經放寬的"四上四落"規定。小組也討論了一些中/長期措施的建議，包括探討"一地兩檢"、"檢入不檢出"、開辦跨境直升機載客服務，和改變控制跨境私家車流量的方式。

#### ii. 新增跨境口岸：

小組建議粵港政府在蓮塘籌劃興建新的跨境口岸，以應付未來發展的需要。深圳和香港政府已就此課題展開研究，小組希望深港政府能盡快就具體的計劃和時間表達成共識。

### 2. 落實CEPA服務業合作工作小組

小組就香港服務業在進入內地市場時面對的困難，建議香港和廣東省加強溝通和合作，提高政策和規例的透明度，簡化申請開業的手續，加強推廣宣傳。同時，廣東省可改善其"一站式服務"，以協助香港企業在廣東省內開業。

此外，小組認為深圳市可作試點，率先推行較簡化的程序及較寬鬆的處理政策協助香港服務業在深圳開業。香港專業服務業亦可為珠三角發展蓬勃的民營企業，提供服務，協助他們到香港發展。

小組建議商務委員會應與政府及有關機構繼續跟進協助服務業和專業服務業人士進入廣東省市場，並向粵港政府反映有關情況，爭取放寬進入內地市場的條例；爭取將旅遊服務納入CEPA內，讓香港旅行社可以在內地經營；與及把握廣東省經濟急速發展的機會，開發商機，並協助及支持廣東省發展服務業。

## 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. 可持續發展小組

小組去年的工作重點包括：

#### i. 改善區域空氣素質：

小組建議鼓勵在大珠三角設廠的港商及內地廠家以身作則，自發性地採取措施，減少排污，以改善空氣質素。就此，小組和香港商界環保大聯盟、廣東省貿促會和廣東省環保產業協會，推動企業簽署《清新空氣約章》。小組亦正探討能否透過推廣技術示範計劃，提高廣東省內港資的生產製造行業，對節省能源、減少排廢、應用清潔生產等的認識。小組也積極向廣東省反映，希望可盡早把汽車廢氣排放標準提升至國IV型(相等於歐盟四期)的標準。

#### ii. 促進社會融合發展：

小組建議香港與內地合作進行調查，以便進一步了解在內地工作／居住的港人的需要。

### 4. 聯合投資貿易推廣工作小組

小組去年的工作集中在以下方面：

#### i. 吸引內地投資者來港

工作小組詳細考慮了香港中央政策組與廣東省發展研究中心的《鼓勵廣東民營企業到香港發展業務研究》報告，建議建立平台，統籌在粵的香港有關機構的資訊發放和推廣活動，集中運用資源。這個平台亦可讓廣東民企更容易取得有關香港的資料。

#### ii. 內地商人移居計劃

小組認為對於有意來港開業又擬舉家移居香港的內地企業家來說，可以在港居留具有一定吸引力。小組正與特區政府討論研究有關建議。

#### iii. 與粵方小組合作

小組與粵方小組舉行了多次會議，並於2005年9月在廣州合辦"赴港投資實務宣講會"，向有興趣來港的珠三角民企介紹香港的營商環境，反應熱烈。兩個小組將會安排有關企業來港作考察活動及在廣東省其他城市舉辦宣講會。

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、教育及人力資源工作小組

去年小組的工作集中在兩方面：

### i. 教育及人才培訓

小組詳細研究及分析了粵港在科技、教育及人才資源培訓的現行合作情況，並建議把教育加入CEPA。

### ii. 設計及科技合作

小組建議粵港可以在設計行業方面，增強溝通和人才交流，以及進一步推動科技合作。

小組將會繼續探討和推動與大珠三角省市在專業及職業培訓的合作的各有關範疇，包括深港科技合作、粵港教育及科技合作和創意產業合作等。

## 6. 旅遊、文化及體育工作小組

### i. 旅遊：

去年小組專注探討有關推廣旅遊的事項，並向有關部門提出建議，包括：

- 減低內地多程出入境簽證收費，以便鼓勵海外旅客，在同一行程內順道來港旅遊。
- 准許持澳門“個人遊”通行證的內地旅客可以順道來港旅遊。
- 准許香港旅行社在CEPA框架下，在內地營辦出入境旅行團。

### ii. 文化：

香港特區政府現時透過粵港澳藝文合作高峰會，與大珠三角地區的部門緊密合作，推動區內文化交流。小組希望兩地政府可以進一步鼓勵社區/文化團體(非政府團體)的交流。小組亦建議，由商務委員會繼續商討在香港成立設計中心的構思，務求令香港在區內創意/設計行業不斷發展的同時，繼續保持其領先的優勢。

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:



## 兩個研究課題

### 1. 廣東產業結構轉型為香港帶來的機遇和挑戰

廣東近年實施一系列經濟結構調整措施，致力提升產業結構，重點發展重工業和高增值行業，同時加速發展和優化服務業。香港的服務業可以為重工業和高科技產業的發展，提供所需的支援服務，藉此創造商機。

因應廣東省的產業結構轉型，現時在珠三角的香港製造業將面對壓力，需要提升技術和調整商業模式，或需遷往較偏遠地區。但隨着越來越多廠商遷往珠三角以外的地區，香港的製造業支援服務可藉此機會拓展市場。

報告建議廣東省政府在轉型過程中，給予香港企業與內地企業同等的政策支援和市場機會，並加強與香港在培訓和研發方面的合作。此外，亦應優先鼓勵現存企業提升科技水平和創新能力，並在海外推廣上，與香港合作推廣大珠三角。

報告亦建議香港特區政府加強吸引海外專才和高級管理人才來港，並借助香港在保護知識產權、資訊流通和金融服務的優勢，把香港發展為技術整合中心。此外，報告也建議香港的商會多向會員解釋廣東產業結構轉型帶來的挑戰和需要適應轉變，及鼓勵會員提升生產力和產品檔次。

- 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

近年來，廣東省政府積極發展珠三角西部的城市，並不斷加強區內的基建設施。根據廣東省的規劃，珠三角西部將重點發展綜合服務功能和依託港口運輸的臨港工業、旅遊、物流和以物資轉運為主的港口貿易等第三產業。相信珠三角西部未來將會有快速發展，並為香港帶來機遇與挑戰。

報告認為香港必須因應珠西重點發展的產業，調整在該地的投資方向。香港亦應利用服務業優勢協助珠西民營企業邁向國際市場。另外，香港商界亦應充份發揮內地市場對香港品牌的信心，在西部建立生產基地，開發內地市場。

總結以上分析，報告建議粵港政府應加強港商對珠西的認識，並消除香港與珠西之間的商貿壁壘，和推動兩地之間的基礎設施。此外，特區政府可加強在珠西的代表網絡，廣東省政府亦應加強協助香港服務業在西部的發展，及對外來投資作出清晰指引。

報告亦建議香港商業團體加深對西部營商環境的認識，積極拓展香港製造業品牌優勢；利用香港的優勢幫助西部的民企開拓海外市場；以及開展科技、教育與人才培訓方面的合作。

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.

## 大珠三角商務委員會的對外聯繫工作

商務委員會及其工作小組與香港特區政府、廣東省政府和中國國際貿易促進委員會廣東省分會(廣東省貿促會)，一直保持密切聯繫。

去年的主要聯繫活動包括：

- 商務委員會在2005年11月與全國政協經濟委員會"珠三角地區經濟協調發展專題組"會面，就珠三角地區的經濟發展交流意見。
- 2005年11月，商務委員會組成訪問團，到廣東省和廣西壯族自治區作三天考察。除了參觀考察外，訪問團亦拜會了廣東省省長黃華華和廣西壯族自治區黨委書記曹伯純，介紹商務委員會的工作，並就加強合作交流意見。
- 商務委員會在2005年9月與深圳市市長許宗衡會面，就加強深港合作交換意見。
- 主席與廣東省貿促會會長葉耀先生舉行多次會議，就兩會的工作交換意見。商務委員會亦於2005年8月接待了廣東省貿促會組織的企業考察團。

商務委員會亦與本港各主要機構和商會合作，委員會對各機構和商會在過去一年的支持，謹表謝意。

## 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

港商界一直致力推動香港與內地的交流和合作，與政府的工作相輔相成。大珠三角商務委員會在粵港合作的各個範疇內，發揮這個關鍵的作用。

商務委員會匯聚香港商界人才，集思廣益，提出具體的政策建議，供兩地政府考慮。從如何促進可持續發展、鼓勵投資、加強科技和旅遊合作、提升處理跨境人流貨流的效率，以至改善CEPA落實工作等方面，商務委員會均提出不少務實可行的建議。此外，商務委員會亦就廣東省產業結構轉型和珠三角西部發展這兩方面對香港的影響進行研究，並提供專業的意見，使兩地政府在制定政策時可以更切合社會及經濟發展的需要。

商務委員會亦與廣東省貿促會及有關機構建立了緊密的聯繫，在改善區內空氣質素、協助廣東省民營企業來港發展、為香港服務業界開拓新發展空間等多方面，攜手推行了不少務實的工作，包括推動《清新空氣約章》及為廣東企業舉辦介紹來港投資的座談會等。

雖然商務委員會成立至今僅僅兩年，但已經建立了獨特的平台，擔當政府與商界之間的橋樑，促進溝通。面對各經濟區域的迅速發展，粵港兩地必須加緊合作，增強大珠三角地區的整體優勢。我期望商務委員會能繼往開來，聯繫兩地，為粵港的共同發展努力。

許仕仁

許仕仁  
香港特別行政區政務司司長  
二零零六年六月



# 政務司司長許仕仁 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

港大珠三角商務委員會是粵港民間合作的重要機構，自成立以來為粵港經貿合作、民間往來做了大量卓有成效的工作。特別是去年以來，大珠三角商務委員會與廣東省貿促會一道，按照"前瞻、全局、務實、互利"的粵港合作原則，緊緊圍繞粵港合作聯席會議達成的共識及合作重點，積極交流，認真調研，緊密合作，提出不少頗有建設性和參考價值的研究報告和建議，為粵港及"泛珠三角"區域合作的全面推進做出了積極貢獻！2005年粵港進出口貿易在連續多年高增長的基礎上再創新高，總額突破2900億美元，服務業、旅遊、口岸、跨境大型基建、科技、文化等合作全面推進。這些成績的取得，大珠三角商務委員會功不可沒！藉此大珠三角商務委員會2005-2006年度年報出版之際，我謹代表廣東省人民政府表示熱烈祝賀！並對大珠三角商務委員會為推動粵港合作做出的努力和貢獻表示衷心感謝！

展望新的一年，隨着我國全面建設小康社會，實施"十一五"發展規劃，CEPA全面實施，大珠三角、泛珠三角區域合作深入推進，必將為粵港合作帶來新的機遇。希望香港大珠三角商務委員會繼續發揮"溝通、研討、建議、促進"的職能作用，當好粵港民間溝通合作的重要使者，為促進粵港合作和兩地的共同繁榮發展做出新的更大貢獻。

湯炳權  
廣東省人民政府常務副省長  
二零零六年六月





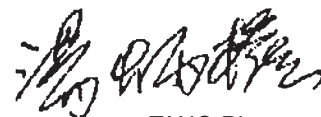
# 廣東省常務副省長湯炳權

## 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 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 21<sup>st</sup> 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.

## 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



# 大珠三角商務委員會 職權範圍及架構

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

# 職權範圍

## Terms of Reference

**向** 行政長官提出建議並在粵港合作聯席會議框架下運作，促使大珠江三角洲（大珠三角）地區在經濟上更緊密合作，負責：

1. 就加強粵港在經濟及其他方面合作所需的政策及推行策略提出建議，藉此推動兩地更多增值合作和可持續發展；
2. 提供途徑，讓粵港兩地的私營機構就如何進一步促進雙向貿易及投資交流意見；
3. 收集香港商界及專業界別對粵港合作事宜的意見，並轉達兩地政府；
4. 協同中央政策組進行關於大珠三角地區日後經濟發展的策略研究；及
5. 與廣東的省市機關建立更緊密的聯繫。

**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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Dr Lee Ching-yee, Jane  
Ms So Kam-lau  
Ms Maria Lau

秘書 Secretary：粵港合作統籌小組組長  
何健華先生

Head, Hong Kong Guangdong Cooperation Coordination Unit  
Mr Arthur K W Ho



# 工作小組 Sub-groups

## 跨境人流物流工作小組

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

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郭炳聯先生	Mr Kwok Ping-luen, Raymond
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劉皇發議員	The Hon Lau Wong-fat
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邵善波先生	Mr Shiu Sin-por
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Deputy Secretary for Constitutional Affairs  
Mr Arthur K W Ho

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## 專責小組 Task Groups





# 珠三角最新發展情況

## Recent Developments in the Pearl River Delta

# 珠三角最新發展情況

## Recent Developments in the Pearl River Delta

### 背景

**珠**三角是推動中國經濟發展的其中一個最重要地區，亦是廣東省的經濟樞紐。根據廣東省的界定，珠三角經濟區包括九個市，分別是廣州、深圳、東莞、佛山、江門、中山、珠海，以及惠州(其中的惠州市區、惠東縣和博羅縣)和肇慶(其中的肇慶市區、高要市和四會市)。

### 地圖

#### 廣東省及珠江三角洲經濟區

### 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



註：圖內橙色部分為珠江三角洲

Note: The area shaded orange denotes the Pearl River Delta

大珠江三角洲(即珠三角加上香港及澳門)的主要管轄區

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



資料來源：投資推廣署  
Source: Invest HK

珠三角地區的經濟發展迅速，2004年的生產總值已達到13,394億元人民幣(1,618.2億美元)。珠三角的主要經濟指標見圖表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.



**圖表1 珠江三角洲的主要經濟指標（當年價格）**  
**Exhibit 1 Major economic indicators of PRD region (at current prices)**

指標 Indicator	1980	1985	1990	1995	2000	2001	2002	2003	2004
戶籍人口(百萬人) <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
生產總值(億元人民幣) <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
第一產業(億元人民幣) Primary industry (0.1billion yuan)	30.7	57.3	129.4	314.9	428.5	445.2	465.0	470.5	506.3
第二產業(億元人民幣) 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
第三產業(億元人民幣) 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
固定資產投資總額(億元人民幣) 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
消費品零售總額(億元人民幣) 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
出口總額(億美元) 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
實際利用外資總額(億美元) 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	註3 Notes 3
地方財政收入(億元人民幣) Local government revenue (0.1billion yuan)	23.4	49.9	95.9	315.3	595.6	745.7	768.7	848.0	932.0
地方財政支出(億元人民幣) Local government expenditure (0.1billion yuan)	8.2	26.1	76.4	316.6	682.1	822.7	963.6	1075.0	1,210.0
城鄉居民年終儲蓄存款(億元人民幣) 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

- 註： (1) 根據2000年進行的全國人口普查，珠三角經濟區共有人口4 080萬，與官方的戶籍人口數字有出入。兩者出現差異的主要原因，是前者計算了外來人口和流動人口，而後者則沒有把這兩類人口計算在內。由於前往珠三角就業者人數眾多，但卻沒有正式的“登記”戶籍，所以珠三角在這方面的人口差異較中國其他地區為大。
- (2) 內地出版的刊物已於2004年開始改稱地區的GDP為“地區生產總值”（例如廣東省生產總值）。中國內地整體的GDP仍稱為“國內生產總值”。
- (3) N.A. 暫時沒有數字

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 “地區生產總值” 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 “國內生產總值”.

(3) N.A. Data not yet available

資料來源：廣東省統計局和 2002年、2003年、2004年及2005年的《廣東統計年鑑》。

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

圖表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	生產總值 <sup>(註 1, 3)</sup> (百萬元人民幣) GDP <sup>(Notes 1, 3)</sup> (million yuan) (按可比價格計算的逐年增長率) (yoy growth at comparable prices)	人均生產總值 <sup>(註 2, 3)</sup> (人民幣) (按可比價格計算的逐年增長率) Per capita GDP <sup>(Notes 2, 3)</sup> (yuan) (yoy growth at comparable prices)	消費品零售總額 (百萬元人民幣)(逐年增長率) Total Retail Sales of Consumer Goods (million yuan) (yoy growth)
廣州 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%)
江門 Jiangmen	69,564 (12.2%)	21,647 (11.0%)	27,583 (-0.7%)
東莞 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%)
肇慶 Zhaoqing	39,056 (13.2%)	13,945 (12.7%)	12,086 (-29.4%)

- 註： (1) 內地出版的刊物已於2004年開始改稱地區的GDP為"地區生產總值" (例如廣東省生產總值)。中國內地整體的GDP仍稱為"國內生產總值"。
- (2) 內地出版的刊物已於2004年開始改稱地區的Per capita GDP為"人均地區生產總值" (例如人均廣東省生產總值)。中國內地整體的Per capita GDP仍稱為"人均國內生產總值"。
- (3) 生產總值數字為初步核算數字，稍後會根據2004年的經濟普查結果作出調整。為適應經濟和社會發展需要，並與國家編製的五年規劃作好銜接，推進國民經濟核算與統計調查體系綜合配套改革，國務院於2003年7月決定，將原有的工業普查、第三產業普查和基本單位普查合併，並將建築業納入普查範圍，在2004年開展第一次全國經濟普查。普查的標準時點是2004年12月31日，時期資料為2004年度。

- Notes: (1) The Chinese term for Gross Domestic Product (GDP) of a region in the Mainland has been renamed as "地區生產總值" 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 "國內生產總值".
- (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. 人均廣東省生產總值). That of the Mainland as a whole remains as "人均國內生產總值".
- (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.

資料來源：《廣東統計年鑑—2005》，2005年各市的統計公報及《廣東統計概要2006》

Sources: Guangdong Statistical Yearbook 2005, statistical communiques of individual cities 2005 and 廣東統計概要2006.

雖然珠三角經濟區只佔全國土地面積的0.4%及普查人口的3.2%，但在2004年卻佔國內生產總值的9.8%、總出口的30.6%及在2003年佔全國實際利用外來直接投資的26.1%(圖表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).

**圖表3 珠三角經濟區對廣東和內地的重要性**  
**Exhibit 3 The importance of PRD Economic Zone in Guangdong and the Mainland**

	2004	
	珠三角經濟區所佔百分比 % share of PRD Economic Zone in	
	廣東 Guangdong	內地 Mainland
土地面積 Land area	23.2%	0.4%
戶籍登記人口 Population of Household Registration	31.4%	1.9%
普查人口 Census population	47.8%	3.2%
生產總值 GDP	83.5%	9.8%
出口 Exports	94.9%	30.6%
實際利用外來直接投資 Foreign Direct Investment actually used	89.7% (2003)	26.1% (2003)

資料來源：《中國統計年鑑—2005》、《廣東統計年鑑—2005》

Sources : China Statistical Yearbook 2005, Guangdong Statistical Yearbook 2005

**圖表4 2005年珠三角個別城市的經濟指標**  
**Exhibit 4 Economic indicators of individual cities in the PRD**

主要城市	生產總值 <sup>(1)</sup> (億元人民幣) GDP <sup>(1)</sup> (0.1billion yuan)	生產總值的組合成分 <sup>(1)</sup> Composition of GDP <sup>(1)</sup>			
		第一產業 (%) Primary industry (%)	第二產業 (%) Secondary industry (%)	第三產業 (%) Tertiary industry (%)	
廣州 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	
東莞 Dongguan	2,182.4	1.0	56.5	42.5	
中山 Zhongshan	817.6	3.8	61.4	34.8	
江門 Jiangmen	802.2	9.9	49.6	40.5	
肇慶 Zhaoqing	453.6	31.2	25.6	43.2	

- 註： (1) 此乃初步核算數字，實際數字有待修訂。為適應經濟和社會發展需要，並與國家編製的五年規劃作好銜接，推進國民經濟核算與統計調查體系綜合配套改革，國務院於2003年7月決定，將原有的工業普查、第三產業普查和基本單位普查合併，並將建築業納入普查範圍，在2004年開展第一次全國經濟普查。普查的標準時點是2004年12月31日，時期資料為2004年度。
- (2) 數字指規模以上的工業企業(全部國有工業企業和年產品銷售收入500萬元人民幣以上的非國有工業企業)。
- (3) N.A. 暫時沒有數字

- 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

資料來源：有關城市的統計公報和《廣東統計概要2006》

Sources : Statistical communiques of relevant cities and 廣東統計概要2006.



	工業總產值 <sup>(2)</sup> (億元人民幣) Gross Industrial Output(2) (0.1billion yuan)	進出口 總額 (億美元) Imports and Exports (0.1billion USD)	實際利用外來 直接投資 (百萬元) FDI actually used (million USD)	城市居民人均 可支配收入(人民幣) Per capita disposable income of urban residents (yuan)	人均生產 總值 <sup>(1)</sup> (人民幣) Per capita GDP(1) (yuan)	消費品零售總額 (億元人民幣) 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

### 珠三角成為製造及採購基地

經過二十多年的發展，珠三角不但成為國內實力雄厚的製造業基地，亦是世界工廠，在紡織及服裝、鞋履、塑膠製品、電腦、電子資訊、電子及電器產品、玩具等多個產業的發展上，均舉足輕重。珠三角地區在製造原料和半製成品方面佔有獨特的優勢，亦是全球多種產品的主要採購基地。

### 產業群及專業鎮

一如其他的地區經濟體系，珠三角內有多個發展蓬勃的產業群，而珠三角產業群的一個明顯特徵就是發展出一批專業鎮。這些專業鎮專門生產一種或多種特色產品，一般從事傳統的製造業、農業及電子資訊業。廣東目前有159個專業鎮<sup>1</sup>。雖然珠三角區內不少專業鎮均位於珠三角西部城市，特別是佛山、江門和中山，但珠三角東部的部分城市亦有大量專業鎮，最典型的例子是東莞，廣東省有10個專業鎮均位於東莞市。圖表5載列珠三角部分專業鎮的資料。

### 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.

1 資料來源：廣東省人民政府工作報告(2006年2月22日)

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

**圖表5 廣東省部分專業鎮**  
**Exhibit 5 Selected specialised towns in Guangdong**

市 Cities	鎮 Towns	產業群 Industrial clusters	市 Cities	鎮 Towns	產業群 Industrial clusters
佛山 Foshan	Lanshi (瀾石)	Stainless steel 不銹鋼	東莞 Dongguan	Shilong (石龍)	Electronics 電子產品
	Zhangcha (張槎)	Knit wear 針織品		Zhangan (長安)	Electronics 電子產品
	Datang (大塘)	Vegetable 蔬菜		Dongfeng (東鳳)	Household electrical appliances 家庭電器
	Shiwan (石灣)	Construction ceramic 建築陶瓷		Minzhong (民眾)	bananas 香蕉
	Yanbu (鹽步)	Underwear 內衣		Humen (虎門)	Garment 成衣
	Chencun (陳村)	Flower 花卉		Dalong (大朗)	Knitted wear (wool) 毛織品
	Guangao (官窑)	Toy 玩具		Changping (常平)	Logistics 物流
	Nanzhuang (南庄)	Porcelain 瓷器		Shijie (石碣)	Electronics 電子產品
	Pingzhou (平洲)	Shoes 鞋履		Houjie (厚街)	Furniture 傢俬
	Lecong (樂從)	Furniture 傢俬		Qingxi (清溪)	Electronics 電子產品
	Lunjiao (倫敦)	Wood Machinery 木工機械	中山 Zhongshan	Shaxi (沙溪)	Garment 成衣
	Genglou (更樓)	Cultivation 農產品		Xiaolan (小欖)	Metal 金屬
	Xiqiao (西樵)	Textiles 紡織品		Guzhen (古鎮)	Lights 燈飾
	Jinsha (金沙)	Metal 金屬		Huangpu (黃圃)	Food 食品
	Dali (大瀝)	Aluminium material 鋁材		Nantou (南頭)	Electrical appliances 電器用品
				Dayong (大涌)	Furniture 傢俬
江門 Jiangmen	Jianghai (江海)	Electronic material 電子物料	Guangzhou 廣州	Shiling (獅嶺)	Leather product 皮革產品
	Pengjiang (蓬江)	Motorcycle 電單車		Xintang (新塘)	Jeans, garment 牛仔褲及成衣
	Shuikou (水口)	Heater 加熱器	Zhuhai 珠海	Huangfu (黃埠)	Shoes 鞋履
	Encheng (恩城)	Microphone 揚聲器	Huizhou 惠州	Jinli (金利)	Metal products 金屬產品
	Shaping (沙坪)	Garment (manufacturing) 製衣			
	Shagang (沙岡)	Textiles 紡織品			
	Shangxiachuan (上下川)	Ocean tourism 海洋旅遊業			
	Siqian (司前)	Stainless steel 不銹鋼			
	Daao (大鰲)	Container 貨櫃			

資料來源：王珺：《珠江三角洲西岸地區產業集群生成機制研究》，《城市經濟、區域經濟》2006。

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

## 產業結構轉型

多年來，勞工密集的輕工業在推動廣東省工業發展方面一直佔主要地位。不過，這情況正出現轉變，廣東省的產業結構近年已逐漸轉型。

首先，珠三角正迅速轉向重工業發展，輕工與重工業比例已由1978年的56.6:44.4變為2004年的44.4:55.6。同年，重工業的總產值為12,867億元人民幣(1,554.5億美元)，較前一年上升28.8%。相比之下，輕工業較為遜色，總產值只有10,286億元人民幣(1,242.8億美元)，升幅為19%。在各類重工業中，重化工和器材製造業均錄得強勁增長，而石化、鋼材和汽車製造業亦發展迅速。舉例來說，汽車製造業在2004年的總產值為783億元人民幣(94.6億美元)，較前一年上升43%。

此外，珠三角的經濟結構亦出現重大轉變，第三產業所佔的經濟比重日漸增加。在1978至2004年間，以地區生產總值計算，珠三角三類產業的比例由25.8:45.3:28.9發展為3.8:53.8:42.4，第三產業所佔的比例增加了46.7%。

## 珠三角市場

今天，珠三角是內地最大、最成熟的消費市場之一。2004年，該區的人均生產總值為46,304元人民幣(5,594美元)，是全國平均的12,336元人民幣(1,490.4美元)的3.8倍。城市居民的人均可支配收入達17,290元人民幣(2,088.9美元)，是全國平均的9,422元人民幣(1,138.3美元)的1.84倍。

珠三角居民日益富裕，對各種服務(如教育、康樂文化、交通、郵遞通訊、金融等)的需求亦隨之增加。同時，商業服務近年亦隨着第二產業的持續增長而迅速發展。

2004年，珠三角的消費品零售總額達4,499億元人民幣(543.5億美元)，佔該區生產總值三分之一以上。主要的消費市場位於廣州及深圳，其零售額分別佔珠三角零售總額的37%及28%。

廣東消費者的消費模式與內地其他地區一樣，出現了重大變化。居民的可動用收入增加，提升了消費結構。

零售業不斷迅速發展。自2005年起，國家按照加入世貿的承諾進一步開放分銷業，全面取消在零售地點、擁有權架構及店鋪數目方面對外資零售商的限制。此舉徹底改變了珠三角零售業的面貌，各類現代化零售經營模式，如超級市場、特大超級市場、便利店、專業服務店、專門店、購物商場／中心，以及網上訂購等，紛紛應運而生。

## 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.

## 加速基建發展

廣東省政府一直致力加強珠三角區內各地的交通連繫。現時廣東省所有大城市之間均有公路和鐵路連接。

### 鐵路

《珠江三角洲地區城際軌道交通網規劃(2005至2020年)》獲得通過，標誌着珠三角鐵路發展進入一個新里程。這些城際高速鐵路和市地鐵建成後，會在珠三角城際之間形成“一小時經濟生活圈”。這個“A”字型的主要網絡包括廣深<sup>2</sup>和廣珠兩條主幹線，另有兩條副線(廣州至肇慶；中山小欖至江門；東莞至惠州)和兩條連接珠三角兩岸城市(順德至番禺至東莞；中山至虎門)的支線。鐵路全長570公里，主幹線將於2010年建成。

其他正在興建的主要鐵路包括廣珠鐵路，連接廣州和位於珠三角西部的珠海。另一項工程是連接華中湖北省會武漢及廣州的武廣高速鐵路。這條鐵路將會連接廣深港高速鐵路，屆時武漢至香港的車程將由現時的12小時縮短至5小時。第三項工程是由深圳至杭州的杭福深客運專線。按照內地現時的鐵路發展計劃，上述工程將於2010年完成。

### 高速公路／公路

根據《廣東省高速公路網規劃(2004至2030年)》文件，一個全長6 500公里的高速公路網將於2004至2030年間建成，其中2 140公里預計位於珠三角內。

現時，正在規劃或興建的主要高速公路／公路包括廣深沿江高速及深港西部通道、港珠澳大橋、京珠高速、廣珠西線及西部沿海高速公路。工程完成後，將會大大增強香港與內地的經濟聯繫及合作關係。

## 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 廣深主幹線延伸至香港，亦即廣深港高速鐵路。

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



## 港口

珠三角港口對工業製品出口至為重要。珠三角的主要港口位於深圳(鹽田、大鵬灣、赤灣、媽灣及蛇口)、廣州(南沙、黃埔、新沙、洪聖沙及西基)、珠海(高欄、洪灣、九洲、灣仔及斗門)和中山(神灣、小欖及中山)，當中以位於深圳的港口最為重要。2005年，深圳港的貨櫃吞吐量位列全球第四及全國第二位，達1 619.7萬標準貨櫃單位(較去年上升18.6%)。

根據《珠江三角洲地區港口建設規劃(2004至2010年)》文件<sup>3</sup>，截至2003年末，珠江三角洲地區港口吞吐能力是2.52億噸。因應珠三角地區將會進一步發展外向型加工業、船舶與汽車製造業、石油化工等重化工業，在集裝箱運輸及能源、原材料運輸等方面將有更大的需求，碼頭建設的重點亦會圍繞集裝箱和進口汽泊位進行。預計到2010年，珠江三角洲地區的港口吞吐能力可達到6.5億噸。

## 機場

至於航空方面，大珠三角共有五個機場，分別為香港國際機場、澳門國際機場、深圳寶安國際機場、廣州新白雲國際機場及珠海機場。預期大珠三角對航空服務的需求將會大增，為大珠三角各個機場帶來大量商機。

## 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.

## 珠江三角洲城鎮群協調發展規劃 (2004至2020年)

過去數年，廣東省政府推出一連串措施，加強協調珠三角的工業發展。廣東省人大常委會先後於2005年1月和同年8月通過及頒布《珠江三角洲城鎮群協調發展規劃(2004至2020年)》。規劃中表明廣東省會銳意加快提升珠三角的整體競爭力，維持珠三角作為主要生產基地的地位，以及將珠三角發展為全球最具經濟活力的地區之一。

該協調發展規劃亦勾劃出珠三角的初步工業布局。未來數年，珠三角將重點發展下列經濟群：農業生產、加工製造、臨港重工業、大型器材製造、高新技術產業、國際物流樞紐和旅遊業。此外，珠三角亦會加速專業鎮和工業園區的發展，最終目的是創建實力和競爭力兼備的工業，鞏固珠三角作為全球生產基地的地位。

另一方面，粵港合作聯席會議轄下的粵港城市規劃及發展專責小組已展開大珠江三角洲城鎮群協調發展規劃研究，從前瞻性的角度考慮和分析大珠三角的發展方向，藉此制定城市和區域發展策略。有關策略旨在解決基建發展、環境保護和協調發展的架構機制等重大區域發展問題，從而加強大珠三角地區的整體競爭優勢，同時確保該區得以持續發展。研究已於2006年3月展開，預計在24個月內完成。

## "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.

## 廣東“十一五”規劃

廣東“十一五”規劃為廣東省定下2006至2010年的發展藍圖。在該五年內，隨着國家加入世貿的過渡期於2005年完結，廣東在國際貿易上將面臨激烈競爭。

根據“十一五”規劃，廣東將會集中力量改善經濟、文化與法律制度，並建設和諧社會。廣東將爭取生產總值在未來五年年增長率不少於9%，並且在2010年生產總值達33,500億元人民幣(4,088億美元)。預期到了2010年，廣東的人均生產總值會較2000年的翻一翻，達到34,824.5元人民幣(4,250美元)。該省三類經濟產業的比例，預計會由2005年的6.3:49.5:44.2變為2010年的5:50:45；而2010年的單位生產總值能源消耗會較2005年的最少降低13%。

此外，為響應中央政府號召以“科學發展觀”指導建設，廣東將致力推動可持續發展及和諧區域發展。在“十一五”期間，該省將鼓勵和支持自主創新的措施。廣東將會提升珠三角的發展水平，鞏固廣州及深圳作為廣東省領導城市的地位，又會大力推動落實CEPA，制訂加強粵港澳合作的措施。此外，廣東亦會積極推進泛珠三角區域合作。

事實上，正如在《廣東省人民政府工作報告》(於2006年2月22日發表)所述，廣東將會通過上述措施，與香港及澳門特區更緊密合作。三地合作的主要範疇包括基建、跨境人流物流、貿易、旅遊、環境保護、科學與科技、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.



# 兩個主要研究課題報告

## Reports on Two Major Studies



# 廣東省產業結構轉型為香港 帶來的機遇和挑戰

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

### 廣東經濟轉型的大方向

**廣**東近年實施一系列經濟結構調整措施，致力提升產業結構，重點發展重工業和高增值行業，同時加速發展服務業。

估計在未來五年，省內汽車、石化和信息產業的增長會較其他產業為快。根據廣東省政府訂下的每年增長目標，上述三個產業在2003至2010年的年均增長分別為25%、20%和21%。到了2010年，信息產業佔廣東製造業總產值的比率預計將達33.8%，石化和汽車業則合共佔16.4%。廣東轉向重工業發展的趨勢十分明顯。2005年，重工業總產值超過2萬億元人民幣(2,441億美元)，佔全省工業總產值的57%。

為提升珠三角的產業結構，廣東不再鼓勵勞動密集及／或高能耗的低增值製造業到省內設廠投資，並採取措施鼓勵現時已在珠三角發展的工業積極提升和創新科技，或者遷往省內的山區或東西兩翼。

服務業在2005年佔全省生產總值的43.8%，廣東希望在未來五年把這個比率進一步提高。除了全面加速發展服務業外，還會優化服務業結構，把廣東發展為華南的金融中心和現代物流樞紐，以及國際商務旅遊及購物中心。廣東將會加強和鼓勵個別行業，如批發零售、物流、金融、會展和商業(專業)服務的發展。

### 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.



為提升經濟發展，廣東致力吸引跨國企業前來開設業務，又會採取措施吸引人才以落實經濟提升計劃。此外，廣東會進一步改善港口、機場、物流園，以及與泛珠三角相鄰省份的交通運輸連繫，藉以加強廣東的區域運輸和物流樞紐地位。

### 對香港服務業和製造業的影響

雖然現時只有少數香港公司有條件借助廣東石化工業高速發展的機會拓展業務，但很多香港廠商已作好準備，把握汽車零部件業帶來的新商機。廣東發展重工業，一方面增加了對先進生產支援服務的需求，另一方面也衍生了一些下游業務的商機。

不過，在珠三角的香港製造業將面臨更大的壓力，須要提升技術和調整商業模式，方法之一是通過生產技術、設計、品牌、供應鏈管理等，為產品增值。至於選擇遷往偏遠地區的廠商，則希望當局能提供足夠的基礎設施和服務支援，讓他們可以在供應鏈管理方面維持國際競爭力。

雖然廣東歡迎香港的服務提供者通過CEPA進入廣東市場，但部分有意到省內開業的香港服務提供者遇到一些實施上的問題。在廣州設立CEPA落實跟進機制，會有一定的幫助。

隨着越來越多廠商遷往珠三角以外的地區，香港的製造業支援服務可藉此機會拓展市場，考慮把握CEPA賦予的先行者優勢，進軍內地，以便緊貼客戶，提供所需服務。

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.

## 對香港作為大珠三角商業中心的影響

發展重工業和高新科技產業需要一系列支援服務，包括融資、設備租賃、工業及專業支援服務等。這將為香港的服務業創造無限商機。外國企業對於保護自有設計及／或科技的知識產權要求甚高，當會認同香港是設立地區辦事處以服務廣東以至全國市場的理想地點。

另一方面，香港將要面對新的挑戰。香港的港口和物流設施以處理貨櫃為主，未能應付廣東重化工業發展的需要。傳統的輕工製造業遷離珠三角後，對香港物流設施的倚賴勢將減少，加上廣東的港口和機場急速擴張，將會加速貨物分流，不經香港付運。2005年，香港貨櫃吞吐量只微升2%至2 240萬標準箱，反觀深圳同期的吞吐量則增長19.1%至1 620萬標準箱。業界普遍預期深圳的吞吐量將於兩、三年內超越香港。

廣東省內既有製造業集群，又有大量土地供應，長遠而言將有力威脅香港貿易展覽之都的地位。事實上，買家直接從內地採購和海外公司把採購辦事處由香港遷往內地的情況正不斷增加。內地進一步開放貿易後，相信越來越多香港的貿易相關活動會轉往珠三角。香港要維持國際貿易中心的地位，就必須匯集更多優質的國際及內地買家和供應商，而自由港亦將繼續是香港的獨特優勢之一。

雖然改善跨境交通、加快清關和降低成本肯定會有幫助，但長遠而言香港顯然仍難與廣東在海運業務上競爭。中期展望，香港在物流方面的優勢主要在於空運，特別是針對高增值貨品（包括廣東工業所需的貴價零部件）的物流運輸。

## 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).



## 對香港長遠發展的影響

廣東加快發展高檔工業和重工業，推動生產低增值消費品的廠戶遷出珠三角，對香港的經濟轉型有深遠影響。假如香港的製造業未能提升和轉型，服務業又不能應付廣東產業結構轉型所產生的新需求，香港的主要經濟支柱(如港口、貿易平台等)長遠可能會被邊緣化。

## 建議

為配合廣東的經濟轉型和把握由此衍生的商機，香港的製造業廠商、服務提供者和有關方面應探討和密切留意：香港有何專門知識可轉移成為廣東新產業生產鏈中的一環，以及廣東需要何種新服務以支援產業結構轉型。

為協助香港的製造業和服務業調整，並支援廣東的經濟轉型，本研究建議廣東省政府：

- 在轉型過程中，給予香港企業與廣東企業同等的政策支援和市場機會；
- 優先鼓勵現存企業提升科技水平和創新能力；
- 在轉型過程中，加強與香港在人才培訓和研發方面的合作；以及
- 在海外推廣上，與香港合作推廣大珠三角相對於內地其他區域所具備的競爭力。

體制和人力資本是香港兩項最寶貴的資源，因此本研究建議香港特區政府：

- 吸引更多人才：  
除加強和提升香港的教育和培訓外，香港特區政府應採取下列措施，增加香港對海外專才和高級管理人員的吸引力：
  - 進一步提高生活質素，包括改善空氣質素、增加國際學校學位等；
  - 簡化海外和內地專才到香港工作和居留的出入境手續；
  - 簡化擁有香港居留權的外國僱員進出廣東的過境手續；
  - 加快興建運輸網絡，接駁廣東的快速客運鐵路及其他跨境運輸服務；以及
  - 與廣東商討增發粵港私家車牌照。

## 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. 整合技術：

借助香港在保護知識產權、資訊流通和金融服務的優勢，把香港發展為技術整合中心，即吸引高科技企業來港，並推動把新科技應用在工業上。

本研究促請香港的商會：

- a. 向會員解釋廣東產業結構轉型帶來的挑戰和需要適應轉變(包括提升技術水平)；及
- b. 鼓勵會員積極制定策略，以改革經營模式，提升生產力和產品檔次，為產品增值。

要維持香港作為服務平台和物流樞紐的地位，必須提高跨境貨流、人流和資金流動的效率，同時降低有關成本。在海關合作檢查跨境貨物方面，現時香港與內地個別城市(如深圳和東莞)已有特定安排，已於香港港口檢查的貨物無須在香港／內地的邊境管制站再次檢查。這個"直通"的概念既省時，又能提高效率 and 降低成本。

此外，要擴大本港商業的規模，增強香港成為地區總部的吸引力，我們必須借助內地的"走出去"政策，吸引內地(特別是廣東)公司來港進行國際採購和集資等活動。

b. *Technology integration:*

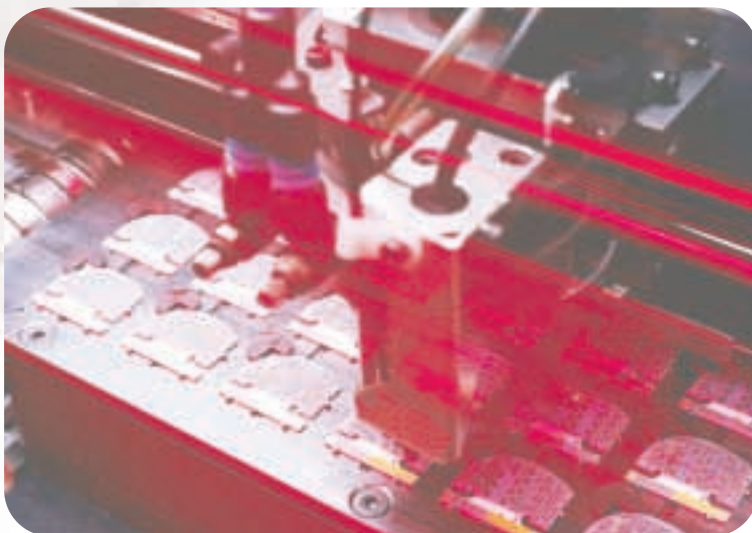
To develop Hong Kong as a technology integration hub by leveraging on Hong Kong's advantages in IPR protection, information flows and financial services, i.e. to attract high-tech enterprises to Hong Kong and to promote the conversion of new technology to application solutions.

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.



# 珠三角西部的發展 及其與香港的合作前景

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

近年，廣東省政府積極發展珠三角西部的城市<sup>1</sup>，並不斷加強區內的基礎設施，加強與香港、澳門及珠三角東部的交通聯繫，相信珠三角西部未來將會有快速發展，並會為香港帶來機遇與挑戰。因此，香港必須了解珠三角西部的發展路向，從而探討應如何把握商機，並配合區內的發展。

### 珠三角西部的發展優勢及限制

經過多年的迅速發展，珠三角東部地區正面臨成本高、土地和能源匱乏以及勞動力短缺等問題。珠三角西部地區擁有豐富土地資源，亦可提供較充足及低廉的勞動力，為珠三角的未來發展提供新的動力和空間。

珠三角西部亦是通往粵西和泛珠三角西南四省區的門戶，而西南四省區是西部開發政策的關鍵區域和中國與東盟合作的連接地帶。發展珠三角西部，可以帶動粵西和泛珠三角西南省區的發展。

從產業群集的現狀看，西部在家電、五金機械等傳統產業方面有優勢，並形成了一批以這些產業為核心的專業鎮。此外，西部在發展旅遊業、商貿業、加工工業、港口和航空服務業方面有廣闊的空間。在經濟結構上，西部地區則是以本土資本為主，民營經濟發達，自主創新能力強。

另一方面，珠三角西部與香港的陸路交通直接聯繫較為缺乏。而在水路聯繫方面，貨物經水路從珠三角西部的主要港口到香港至少需要24小時(包括裝卸貨櫃的時間)。同時，珠三角西部在基礎設施建設方面，亦較東部緩慢。廣珠東線高速公路仍未全線通車、廣珠西線高速公路及廣珠鐵路亦有待興建。這些交通限制，影響了香港在珠三角西部地區的投資。

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.

1 本研究採用廣東省在珠三角各項規劃中對西部(西岸)、中部和東部(東岸)的範圍劃分，即將珠三角西部視為珠海、中山和江門三市，同時兼顧佛山及肇慶兩市的發展。

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.

## 珠三角西部的發展對香港的影響

### 香港應積極"向西看"，抓住先機

港珠澳大橋的發展，將拉近香港與珠三角西部的距離，為珠三角西部各市帶來巨大的發展機會的同時，亦拓展了珠三角的經濟腹地 and 發展空間。而且，西部地區是大珠三角連接粵西和中國西南地區的門戶，西南地區又與越南、柬埔寨等東盟國家緊密相連。因此，香港應抓住珠三角西部發展的機遇，利用這個"跳板"，將香港的腹地進一步拓展至中國西南地區甚至東盟國家。

根據廣東省的規劃，珠三角西部將重點發展綜合服務功能和依託於港口運輸的臨港工業(如能源、重化工及機械工業)、高技術的醫藥微生物工程、旅遊業、物流業和以物資轉運為主的港口貿易等第三產業。另外，珠三角西部民營經濟發達，不少民營企業正積極準備"走出去"，香港可在珠三角西部城市的民營企業"走出去"的過程中扮演重要角色。



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資領域

香港過去在珠三角的製造業投資以“前店後廠”為主要模式。然而，廣東省近年提出調整產業結構的策略，積極發展重工業、高新技術產業和服務業，輕加工製造業在未來廣東省產業結構中的重要性將逐漸減弱。香港必須充分利用CEPA，拓展在香港優勢產業(如金融服務、生產服務、資訊服務等)領域內的投資，積極配合並充分利用廣東省產業結構的轉化，找到在大珠三角產業鏈中的位置。

重化工業、鋼鐵、汽車製造等都是珠三角西部重點發展的產業；香港的金融服務、企業管理、信息和各種專業服務等方面可以發揮所長，積極配合這些產業的發展。而在高新技術產業方面，香港與珠三角西部各具優勢，亦可加強合作，包括幫助珠三角西部企業吸收外來技術，及協助國外高新技術產業到珠三角西部投資。

此外，在某些製造業，例如食品加工業、鐘錶、珠寶、製藥等行業，“香港製造”品牌在內地市場有很強的吸引力。這些行業可充分發揮內地市場對香港品牌的信心，在珠三角西部建立生產基地，並開發內地市場。

## 鼓勵珠三角西部企業來港發展

珠三角西部地區民營經濟發達，越來越多具備一定規模和實力的民營企業開始謀求規範化、國際化經營，並希望邁向國際市場。但是，民營企業在這個過程中遇到不少融資、風險管理、拓展市場等的問題。香港可以在這些方面發揮所長，以發達的金融業和商貿服務，以及豐富的國際經驗，協助西部地區民營企業開拓國際市場。

香港特區政府及商界應採取不同形式，積極推介香港的營商環境，針對西部地區民營企業的文化特色，提供個性化服務，讓他們適應在港發展；並可針對個別有較高機會來港經營的行業的民營企業進行重點推介。

## 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、教育與人才培訓合作

珠三角西部的迅速發展，亦帶來對各類管理人才（包括高質素技術、半技術及專業人才）的迫切需求。香港可從教育及人力資源培訓的角度推動珠三角服務業的發展。另外，可透過教育與人才培訓，把香港金融、貿易、航運物流、旅遊等國際專業學會的聯繫和標準引進西部地區，並推動國際法律、知識產權、品牌信譽等價值觀培訓。

具體而言，粵港兩地政府可考慮加快在人力資源的合作，將人力資源培訓開放的時間表適度提前，並分階段、規模化引進香港優質培訓資源。此外，兩地政府應積極統籌兩地人力資源開發，鼓勵培訓資源多元投入，並考慮組建大珠三角教育及人力資源資訊中心，建立相關專業人才數據庫。

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.

## 總結

現今，香港與珠三角西部展開更深層次、更廣範圍的合作的時機已成熟。香港與珠三角西部城市在投資和合作策略方面，應積極探索兩地分工協作的新模式，和重點拓展在優勢產業內的投資，拓展香港製造業品牌優勢，並可在幫助珠三角西部民營企業走出國門拓展海外市場、及與廣東省推動科技、教育與人才培訓方面的合作。

總結以上分析，本研究對香港特區政府、廣東省政府、及香港商界提出以下一系列建議：

### 香港政府

- 及時了解和傳遞珠三角西部城市的經濟、社會、文化發展、分析對香港可能產生的影響及帶給香港的機遇與挑戰，協助港商了解珠三角西部營商環境，以洞悉先機；
- 主動了解珠三角規劃、計劃的制定，配合並推動區域經濟融合；
- 主動接觸珠三角西部各市的地方政府，鼓勵香港企業與其溝通；
- 消除香港與珠三角西部之間阻礙人流、物流、資金流的壁壘；
- 積極推動連接香港與珠三角西部的基礎設施的建設；
- 幫助香港商界了解珠三角西部企業的資料，包括業務性質、規模、未來發展計劃、需要何種服務等；
- 幫助提高珠三角西部企業及社會了解香港服務業的優勢，及香港可以為內地企業提供的服務；及
- 加強在珠三角西部的代表網絡，向外積極推介香港，向內為在珠三角西部的港商提供服務。

## 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.

## 廣東省政府

- 建設政府服務平台，提高政府服務效率和質量；
- 消除珠三角西部與香港之間阻礙人流、物流、資金流的壁壘；
- 積極推動連接珠三角西部與香港的基礎設施的建設；
- 增強珠三角西部發展相關規劃、策略、政策的透明度，加強相關信息釋放的準確性、及時性和全面性，
- 對外來投資作出清晰指引；及
- 幫助珠三角西部企業及社會了解香港服務業的優勢，了解香港可以提供的服務；並協助香港服務業在珠三角西部的發展。

## 香港商業團體

- 在投資的地域方面，更積極地發掘珠三角西部、乃至粵西、大西南的發展潛力；
- 通過各種渠道積極了解珠三角西部獨特的優勢與劣勢、當地的發展規劃、計劃、策略及吸收外資的政策，制訂有針對性的投資策略；
- 在投資的領域方面，一方面積極拓展香港製造業品牌優勢；另一方面開拓在金融、物流、生產和專業服務等香港優勢領域內的投資，並根據珠三角西部城市的需求提供量體裁衣的服務；
- 積極接觸珠三角西部的民營企業，了解其特徵、發展計劃、面對的問題和所需的服務，利用香港的各種優勢幫助珠三角西部的民營企業開拓海外市場；及
- 與珠三角西部各市開展科技、教育與人才培訓方面的合作。

## 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.



# 工作小組報告

## Reports of the Sub-groups



# 跨境人流物流工作小組

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

### 工作目標及範圍

小組的工作是就促進粵港兩地人流、貨流通關具體措施提出改善建議，目的是提升大珠三角作為一個經濟體的整體營商效率。

### 工作進度及意見

小組曾討論的議題包括加強內地海關報關運作的靈活性、廣東省內陸車檢場作業模式、“一地兩檢”及“檢入不檢出”方案、發展蓮塘口岸和改善陸路整體通關效率等。

去年小組的工作集中兩方面：

#### 1. 提升貨運跨境過關的效率：

- i. 小組提出多項建議，短期措施包括簡化貨車報關程序、海關取消午飯及晚飯停關的安排、以及落實執行並加大宣傳已經放寬的“四上四落”規定。商界也支持這些建議，亦透過工業總會渠道，向廣東省領導提出，並得到他們正面回應，表示會就建議進行可行性研究。
- ii. 小組也討論了一些中/長期措施的建議，包括實行“一地兩檢”、“檢入不檢出”、開辦跨境直升機載客服務，和改變控制跨境私家車流量的方式。小組將就這些建議搜集更多資料，再決定跟進的先後次序。

### 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. 小組認為廣東省東部持續發展，加上泛珠三角區域合作的展開，香港與粵東地區及福建、江西等地的聯繫將會增加。按照目前粵港兩地人流、貨流增長的趨勢，現時三個跨境口岸，加上即將開通的深港西部通道，也未必能夠應付未來的需求。因此，小組建議兩地政府應及早籌劃興建新的跨境口岸，而選址以香港東面地區為佳。

ii. 2005年10月，小組邀請了規劃署講解發展蓮塘/香園圍新口岸的研究和進展，並在今年2月底邀請了十多個行業商會的代表，聽取他們的意見。會上，大部分人士都認為香港應善用深圳的發展所提供的機遇，加強交通聯繫，對深港兩地都有好處。雖然現時的交通流量未必很大，但規劃的眼光要放遠，才能應付長遠需要。

iii. 小組很高興特區政府積極研究這個建議。在去年九月政務司司長許仕仁與深圳許宗衡市長舉行的深港合作會議上，雙方同意成立聯合研究小組，探討相關問題，包括分析跨境交通流量、和新口岸對各方面的影響。我們希望兩地政府能盡快就具體的計劃和時間表達成共識。

## 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.

## 未來工作

工作小組將繼續與粵港兩地政府的相關部門，就已提出的建議進行商討，例如深港西部通道開通後的過境安排，包括跨境車輛的安排、接駁交通、人貨通關安排等事項。此外，小組也會開展新的研究課題。

## 結語

珠三角地區工貿活動近年持續高速發展，粵港兩地經貿關係愈來愈密切，深港跨境運輸也日趨繁忙，要加快大珠三角地區的經濟融合、強化這個地區的競爭力，必須盡快提升深港跨境人流和物流的效率，以確保大珠三角經濟能夠持續發展，進一步鞏固其作為“世界工廠”的地位。小組期望粵港政府共同致力發展大珠三角地區基礎建設，簡化通關程序和改善口岸設施，好讓大珠三角地區充分發揮對國家經濟發展的作用。

## 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.



# 落實CEPA服務業合作工作小組

## Services-Implementation of CEPA Sub-group

### 工作目標及範圍

工作小組集中研究服務行業進入內地市場的安排及實施進度，工作目標包括研究如何加強推廣CEPA、了解及建議如何解決服務提供者在廣東省開業時遇到的困難，及研究專業服務在廣東省發展的前景及問題等。

### 工作進度及意見

過去一年，工作小組探討了CEPA實施以來的效益、對專業服務業帶來的機會，以及服務業在CEPA框架下進入廣東省市場所遇到的限制，尤其是個別專業例如建築、工程行業及醫療服務業等。

小組認為，在CEPA的框架下，粵港服務業的合作空間很大，但服務界特別是專業服務界，在進入內地市場方面仍然面對一定困難。小組提出了以下幾個原因：

#### 1. 業界對內地法規不熟悉

香港服務提供者一般對內地法規並不熟悉，加上內地某些政策透明度不高，申請開業手續繁複，因此在辦理開業時遇到不少困難。例如在醫療界，內地醫生一般在醫療機構工作，私人執業情況並不普遍。在內地開辦醫療機構，除需要一定的開業資本外，申請手續也相當繁複。

#### 2. 兩地制度不同，開業門檻仍高

在會計界，在內地執業除了要符合在內地連續居住三個月的條件外，還要取得專業考試合格。有業界反映專業考試相當困難，加上開業門檻仍高，因此中小型會計師事務所難以在內地開業。即使個別行業的專業資格可以互認，在開業時仍可能遇到其他問題。例如在建築專業，內地採用建築、結構及其他相關行業綜合營運的模式，有別於香港一般的單一專業模式，對申請開業構成困難。工程及規劃等行業也遇到類似問題。

### 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.



小組認為可通過推廣合作和加強溝通，讓相關業界加強把握和發揮CEPA帶來的商機。廣東省和香港在交通、商貿、資訊、人流和物流方面關係最為密切，因此小組認為廣東省可以作為開拓內地市場的台階。具體建議包括：

1. 香港和廣東省應加強溝通和合作，提高政策和規例的透明度，簡化申請開業的手續，加強推廣宣傳，令業界更了解CEPA提供的機會及便利。
2. 廣東省可改善其"一站式服務"，以協助香港企業在廣東省內開業。粵港兩地提供申請開業服務的機構應多加溝通，了解雙方的服務需求，以提高服務品質。

2005年5月11日，工作小組與香港專業聯盟及粵港民間合作機制下的粵方服務業合作研討小組合辦了座談會，討論香港專業進入廣東省市場的機遇和方法。工作小組及香港專業聯盟安排了內地官員到訪，向香港專業人士講解在廣東開業的手續。座談會反應熱烈，與會人數高達百多人，加深了香港專業界對在廣東開業情況的了解。



## 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.

## 其他意見：

1. 過去二十年，深圳經濟特區曾帶頭推行多項改革，小組認為深圳市可以作為試點，率先推行較簡化的程序及較寬鬆的處理政策協助香港服務業在深圳開業。深圳市政府表示，歡迎香港的服務業，特別是保險業、投資銀行業及證券服務業等金融服務業到深圳開業。
2. 在開發珠三角西部市場方面，香港可擔任中介角色，作為內地及有意在珠三角西部投資的外商之間的橋樑，一方面協助外商進入內地，另一方面為內地企業提供品牌管理、行政及傳銷等服務。
3. 香港專業服務業更可為珠三角發展蓬勃的民營企業提供服務，協助他們到香港發展。
4. 在醫療界別方面，建議香港特區政府考慮作出推動，協助業內人士與內地磋商，要求內地簡化申請程序，並協助香港醫療機構在內地設立分部。為了早日取得內地批准香港醫生以私人名義執業，香港應游說廣東試行放寬有關規定。

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

1. 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.
2. 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.
3. 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.
4. 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.

## 未來工作

工作小組會與政府及有關機構繼續跟進以下事項：

1. 探討協助服務業和專業服務業人士進入廣東省市場的方法，並向粵港政府反映有關情況，爭取放寬進入內地市場的條例。
2. 研究如何跟進旅遊、文化及體育工作小組的建議，爭取將旅遊服務納入CEPA內，讓香港旅行社可以在內地經營。
3. 兩地政府應繼續溝通，盡量簡化手續，方便香港服務業進入廣東省市場。
4. 探討如何把握廣東省經濟急速發展的機會，開發商機，並協助及支持廣東省發展服務行業。

## 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.





# 可持續發展工作小組

## Sustainable Development Sub-group

### 工作目標及範圍

**可**持續發展工作小組認為應積極加強香港與廣東的合作，將可持續發展概念貫徹在大珠三角社會當中，以配合大珠三角迅速的經濟增長，為兩地社會的長遠而全面的發展建立良好的根基。

工作小組非常關注區域性空氣污染及兩地人流交往增長的發展。因此，小組認為必須改善區域性空氣質素，及關注港人在大珠三角城市生活/工作所需的支援服務。

### 工作進度及意見

為了達致上述目標，可持續發展工作小組在過去一年舉行了四次會議，邀請了政府部門、研究機構代表、商會代表等出席會議，就如何改善空氣質素的問題進行探討。此外，小組於去年七月前往廣州，與粵方可持續發展小組舉行會議，就雙方關心的議題交流意見。小組去年的工作重點包括：

#### 1. 改善區域性空氣污染

小組認為現時大珠三角地區的環境污染問題日趨嚴重，尤其是空氣方面，並同意首要工作是改善珠三角地區的空氣質素。大珠三角的人口及工業增長速度十分驚人，要改善區內的空氣質素，香港必定要與廣東省加強溝通，以及建立官、商及民三方的合作，方能達致成效。

##### i. 清新空氣約章

大珠三角商務委員會、香港總商會、香港商界環保大聯盟、廣東省貿促會及廣東省環保產業協會合作在2005年11月20日舉行的清新空氣日，推出《清新空氣約章》。香港廠商會及廣東省貿促會更協助在大珠三角城市向企業派發這份約章，並鼓勵在當地設廠的兩地廠家以身作則，自發性地採取措施，減少排污，以改善空氣質素。

### 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. 清潔生產示範計劃

小組正與環保署討論，探討能否透過推廣技術示範計劃，提高廣東省內港資的生產製造行業，對節省能源、減少排廢、應用清潔生產等的認識。並向大珠三角地區的企業介紹清潔生產措施，以期提高企業的社會責任意識，並於大珠三角深化落實可持續發展及環境保護的概念。

## iii. 減少汽車排廢及燃油質素控制

汽車燃料及車輛尾氣排放亦是珠三角城市的一個主要空氣污染源頭。香港政府在2006年開始對新登記車輛實施歐盟四期排放標準。相對來說，廣東省地方較香港為大，廣東省政府正爭取落實在珠三角城市提前推行國III型(相等於歐盟三期)機動車尾氣排放標準。因此，在粵港合作改善空氣質素方面，小組正積極向廣東省反映，希望廣東省也可盡早把廢氣排放標準提升至國IV型(相等於歐盟四期)的標準。並同時提高燃油品質標準。

## 2. 促進社會融合發展

為進一步探討現時港人在內地生活的現況，小組邀請了政府部門，向委員簡介現時居住或長期逗留在內地的香港居民的特徵，及是否有利用香港的社會服務。小組認同要掌握長期逗留在內地的港人數目及向有關人士進行調查是存有一定的困難，但為了促進與內地的港人建立更深厚的聯繫及了解他們的需要，小組認為政府及有關機構應該就有關議題進行更深入的探討。

## 未來工作

在改善區域性環境污染方面，小組將繼續與政府部門及各方專業進行交流，探討如何引進專業技術的支援，加強兩地政府的合作及推動商界的支持，一方面致力於大珠三角城市落實推動清潔生產，另一方面推展汽車尾氣排放/汽車燃料的管制工作。

在促進兩地社會融合發展方面，小組希望香港政府可以現時的資料為基礎，再作進一步的詳細分析。小組同時建議香港與內地合作進行調查，以便可接觸長期逗留在內地而沒有回港的人士，進一步了解這些港人的需要。

## 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.

# 聯合投資貿易推廣工作小組

## Joint Investment and Trade Promotion Sub-group

### 工作目標及範圍

在商務委員會2004/05年報中總結工作時，聯合投資貿易推廣工作小組指出由於涉及的事宜非常廣泛，所以小組應與廣東省小組訂定清晰的方向和共同的目標，並集中處理幾個重要範疇。

商務委員會其後委託工作小組負責研究有關吸引內地民營企業來港的事宜，這是商務委員會在2004/05年度三個主要研究課題之一。此外，工作小組決定與粵方小組加緊合作，進一步向廣東企業推廣香港的投資環境。

### 工作進度及意見

#### 1. 吸引廣東省投資者來港

工作小組就香港中央政策組與廣東省發展研究中心進行的《鼓勵廣東民營企業到香港發展業務研究》提供意見。

這項研究於2005年年底完成。據研究的其中一項發現，約四分之一(24%)的廣東民企正計劃出外成立公司或辦事處，其中三分二表示香港是他們屬意的地方。

工作小組和商務委員會已詳細考慮研究報告的內容。研究的主要發現之一，是現時粵港兩地有多個機構協助廣東民企到香港開業<sup>1</sup>。工作小組建議建立平台，統籌資訊發放和推廣活動，藉以整合工作，提升效率。這個平台亦可發揮下列作用，使各方的工作更有成效：

<sup>1</sup> 這些機構包括貿易發展局、投資推廣署、中國國際貿易促進委員會廣東分會，以及多個商會等。

### 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> 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. 提高廣東企業的認知；
- ii. 加強現時協助企業開拓業務工作(如培訓活動)的成效；
- iii. 集中運用額外資源，如推行更持久的傳媒推廣計劃，或者由商會舉辦更切合企業需要的支援活動；
- iv. 讓廣東企業更容易取得有關香港的資訊；及
- v. 協助不同機構合作，促進彼此的工作，達到"整合機構"的目的。

## 2. 內地商人移居計劃

工作小組認為，對於有意來港開業又擬舉家移居香港的內地企業家來說，可以在港居留具有一定的吸引力。因此，工作小組已主動與保安局和入境事務處磋商，研究是否有可行途徑鼓勵內地商人移居香港並在此開展業務。

## 3. 與粵方工作小組合作

工作小組在2004/05年度與粵方小組進行了初步接觸，其後又與廣東外商投資企業協會黃志煒先生擔任組長的粵方小組舉行了多次會議。雙方同意為了整個地區的長遠利益着想，應持續合作，聯手推廣貿易與投資。

2005年9月，兩個小組在廣州合辦赴港投資宣講會，向有意來港的珠三角民企介紹香港，共有超過200名準投資者參加，反應熱烈。出席者認為內容非常適切實際。在工作小組的協助下，部分有意投資者其後更組成考察團，於2006年來港實地考察，與本港政府部門和商界會晤，了解來港開業的具體問題。

- 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.



## 未來工作

展望來年，工作小組會繼續單獨或與粵方合作進行計劃和研究，向海外市場推廣大珠三角地區，以及致力吸引廣東企業來港開業。有關工作包括：

1. 與粵方小組加強合作，在珠三角城市合辦赴港投資宣講會，並接待廣東的投資考察團；
2. 繼續探討為所有協助廣東企業"走出去"的推廣機構建立共用平台；
3. 研究方法，改善現時向在港的珠三角企業提供的支援服務；以及
4. 與入境事務處跟進以協助更多內地商人和專業人士移居香港。

## 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 及人力資源工作小組

## Technology, Education and Human Resources Sub-group

### 工作目標及範圍

**就** 促進粵港兩地在科技、教育及人才資源培訓方面合作：

1. 提出政策及策略上建議；
2. 推動兩地的私營機構作更進一步合作；  
及
3. 與廣東省及各主要城市就有關範疇建立更緊密的聯繫。

### 工作進度及意見

#### 教育及人才培訓

小組去年詳細研究及分析了粵港在科技、教育及人才資源培訓的現行合作情況。

經多次討論及與香港特區政府有關部門交流意見後，小組完成了把教育加入《內地與香港建立更緊密經貿關係安排》第三階段 (CEPA III) 的建議報告，呈交教育統籌局，並向工商及科技局作出詳盡介紹。鑒於中央政府暫未開放教育服務，建議未獲納入 CEPA III。

粵港在人才培訓合作方面，在去年取得進展。在多方面推動下，香港工業總會與惠州市商業學校在去年簽署產學合作項目，提供工商業所需職業培訓，為大珠三角職業培訓踏出重要一步。

### 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.

## 設計及科技合作

香港設計中心於2005年11月舉辦"亞洲風尚 — 設計營商周2005"大型國際會議，由世界首屈一指國際大師演講，吸引大批國內設計人才經廣州、東莞及深圳政府安排，到港參與會議並在品牌及設計教育範疇上作出重要交流。小組建議粵港可以在設計行業方面，增強溝通和人才交流。

在2006年3月21日，香港科技園亦與深圳高新區及西安高新區，就三方跨區域創新科技合作發展簽署合作備忘錄，成立聯合服務平台，加強三方在資訊上之交流，擴展三方的技術資源及服務的輻射。小組認為此合作項目有利於兩區發展。同時，小組應該在粵港兩地科技合作事宜上，多搜集和了解類似的合作成果和障礙，以便進一步推動科技合作。

## 未來工作

小組將會繼續探討和推動與大珠三角在專業及職業培訓的合作，包括深港科技合作、粵港教育及科技合作和創意產業合作等。



## 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.



# 旅遊、文化及體育工作小組

## Tourism, Culture and Sports Sub-group

### 工作目標及範圍

小組的工作目標是就加強粵港旅遊、文化和體育合作的政策和策略提供意見，藉以

1. 促進和便利粵港兩地旅客互訪；以及
2. 推動粵港兩地文化藝術和創意設計的發展和合作，並促進兩地人才資源的融合、本土經濟發展和文化創新。

### 工作範圍

1. 旅遊：推動改善有關基建、交通設施、出入境手續及過境設施，以便與廣東省不同地方連接起來，方便旅客來港或經香港前往其他海外的主要目的地；及
2. 文化：加強粵港兩地在演藝活動和文化方面的合作和交流，並促進兩地創意產業群聚區的發展。

### 工作進度及意見

#### 旅遊

2005年，香港的旅遊業持續穩健增長，訪港旅客達2 300萬人次，較之前一年上升7.1%。由2006年5月1日起，"個人遊"措施延伸至內地44個城市，進一步覆蓋泛珠江三角洲地區餘下六個省會，有助進一步推高訪港旅客人次，為旅遊業帶來裨益。

為進一步刺激旅客流量，小組專注探討有關簽證的事宜，包括：

1. 處理因內地多程出入境簽證收費高昂，而影響了海外/商務旅客順道來港的意欲；及
2. 便利持有有效澳門通行證的內地旅客在同一行程內來港旅遊。

### 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，小組亦繼續尋求有關部門的支持，以准許香港旅行社根據《內地與香港建立更緊密經貿關係安排》(CEPA)，在內地(尤其是廣東省)，營辦國內和國外旅行團。

## 工作進度

小組已經向相關的政府決策局提出有關事項，並與廣東省旅遊局跟進內地多程出入境簽證收費影響海外旅客順道來港旅遊一事。廣東省旅遊局初步表示支持進行評估，以便研究是否可以調低簽證收費，鼓勵持有有效簽證的海外旅客，在同一行程內順道來港旅遊。

小組亦已向有關部門提出，准許持澳門"個人遊"通行證的內地旅客來港旅遊，現正等候回覆。

另外，根據CEPA第三階段的協議，香港旅行社和經營商須符合的資本額及每年總營業額已獲調低，相信有助香港經營商在內地擴展業務。而香港旅行社在內地營辦出入境旅行團的運作事宜，則會在CEPA的第四階段下繼續探討。

## 文化

香港特區政府民政事務局，透過粵港澳藝文合作高峰會，繼續與大珠三角地區的部門緊密合作，加強區內的文化交流，特別是有關演藝活動方面的交流和成立廣東戲曲資料中心。

## 工作進度

小組配合了政府的有關工作，亦希望有關方面在促進社區藝術/文化團體(非政府團體)交流方面進一步努力。至於以長沙灣服裝業群聚區為試點的建議，鑑於長沙灣工業大廈將於2006年底完成清拆，小組經商議後，同意由商務委員會進一步商討在香港推動設計行業的構思，務求令香港在區內創意/設計行業不斷發展的同時，繼續保持其領先的優勢。

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.





## 結語

商務委員會於本年4月檢討了轄下各個工作小組的未來工作範疇，經商議後，同意將旅遊、文化及體育工作小組的工作分別由跨境人流物流工作小組、服務業發展工作小組及科技、教育及人才資源工作小組跟進：

1. 跨境人流物流工作小組
  - i. 跟進有關簽證的事宜以促進人流，及文化交流；
  - ii. 方便前往大珠三角地區的海外旅客順道來港或前往大珠三角其他地點旅遊；及
  - iii. 方便持有有效簽證的內地旅客來港旅遊。
2. 服務業發展工作小組
  - i. 就《更緊密經貿關係安排》第四階段協議內，繼續與有關部門聯繫。
3. 科技、教育及人才資源工作小組
  - i. 加強大珠三角區"非政府"團體的文化交流；及
  - ii. 促進於文化/創意工業，並鞏固香港作為區內創意工業這類高增值工業中心的地位。

## 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.

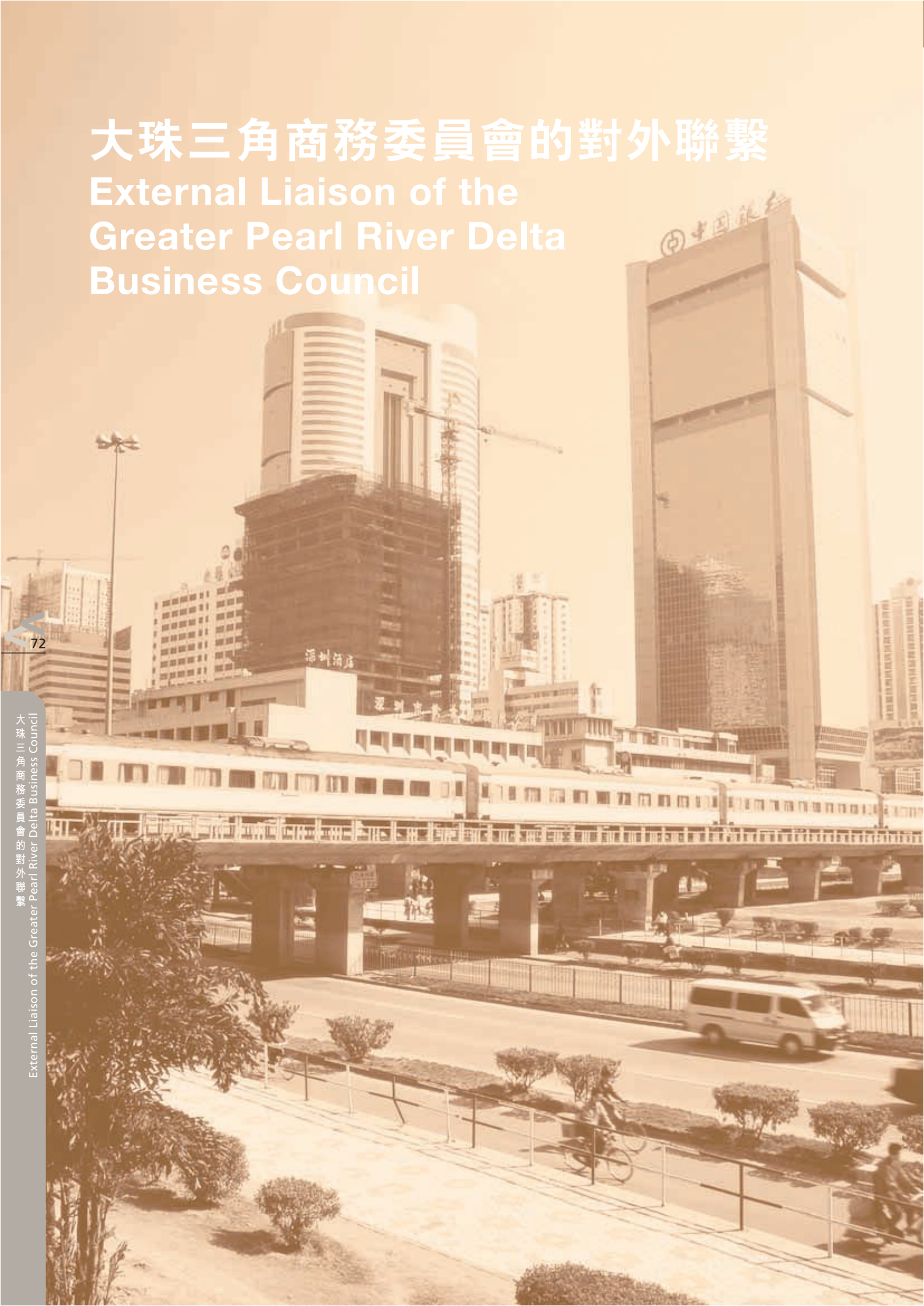


# 大珠三角商務委員會的對外聯繫

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



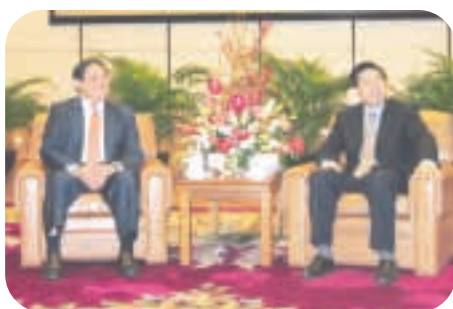
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# 大珠三角商務委員會 的對外聯繫

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



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.

在過去的一年，商務委員會積極與粵港政府、廣東省貿促會及有關的商界組織、和兩地的學術界商討各議題和交流意見，亦與香港的主要商會，以及推廣粵港合作的機構保持緊密聯繫。商務委員會非常感謝各機構對商務委員會工作的支持。

### 與粵港政府的聯繫

作為粵港合作聯席會議框架下成立的組織，商務委員會及其工作小組不時與兩地有關政府部門會面，就促進兩地在投資推廣、便利人流物流、環境保護和科技及教育發展等方面合作，商討建議及交換意見。

商務委員會亦與兩地政府高層會面，以報告工作進度並反映商界的意見，包括馮國經主席於2005年9月粵港合作聯席會議第八次會議上，向兩地政府匯報工作進度及介紹未來工作重點。

此外，商務委員會於2005年11月23日到廣州與廣東省省長黃華華會面，主席及委員向省長提出對粵港合作多個課題的意見，並得到省長的正面回應和支持。商務委員會亦在2005年9月6日與深圳市市長許宗衡會面，就加強深港合作交換意見。

### 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.



## 與廣東省貿促會的聯繫

商務委員會與廣東省貿促會都是粵港合作聯席會議框架下成立的商界組織，兩會一直保持聯繫，共同推動務實的合作工作。

廣東省貿促會於2005年8月組織企業考察團來港訪問，了解在港營商的環境及有關問題。商務委員會接待了考察團並安排與相關的機構會面，包括香港貿易發展局及香港投資推廣署等，以加深考察團對香港投資環境的認識。

## 課題交流

商務委員會去年成立了兩個專責小組，分別研究廣東省產業結構轉型對香港工商界帶來的機遇和挑戰；和珠三角西部發展及與香港的合作前景。兩個小組在今年初完成研究初稿後，在廣東省貿促會的協助下，與廣東省政府多個有關部門及學者，進行了坦率的交流。

## 工作小組聯繫

商務委員會的可持續發展工作小組在2005年7月，與廣東省可持續發展小組舉行了聯合會議，商討如何攜手合作改善大珠三角地區的空氣質素。在兩個小組的努力下，廣東省貿促會和商務委員會於2005年11月共同支持香港商界環保大聯盟推動兩地企業簽署《清新空氣約章》。

商務委員會的聯合投資貿易推廣工作小組於去年亦與廣東省聯合投資小組舉行多次會議，並在2005年9月在廣州舉辦「赴港投資實務宣講會」，向超過200位廣東省民營企業代表，介紹到香港開業的手續及香港的投資環境。參加者對宣講會反應很好，兩個小組計劃安排有興趣來港開業的企業到港考察，並會在今年在其他城市舉辦同類宣講會，推動廣東省企業來港開業。

## 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.





## 訪問廣東省及廣西壯族自治區 (2005年11月23至25日)

商務委員會在2005年11月組成訪問團，由馮國經主席率領，到廣東省和廣西壯族自治區作三天考察。考察團在廣州拜會了黃華華省長，主席向省長簡介商務委員會的研究課題及工作進度。在廣東省期間，訪問團參觀了廣州科學城，了解現時廣州高新科技產業的發展。同時，訪問團亦參觀了花都區市容及花都機場的運作。

訪問團隨後轉飛廣西壯族自治區首府南寧市，拜會了自治區黨委書記曹伯純。主席除了介紹商務委員會的工作外，亦與曹書記就香港商界如何配合泛珠三角區域合作及桂港合作交換意見。在廣西期間，代表團考察了欽州、北海和南寧三市的發展。這次行程，讓商務委員會增進對廣西的了解，亦有助委員會在研究促進粵港兩地發展時可加強參考泛珠三角所提供的巨大腹地和商機。

## 與全國政協代表交流

商務委員會在2005年11月與全國政協經濟委員會“珠三角地區經濟協調發展專題組”會面，就珠三角地區的經濟發展交流意見。

## 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.



## 商務委員會曾聯繫的主要機構和商會

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

政府部門 Government Departments	網站 Website	電郵地址 E-mail Address
工業貿易署 Trade and Industry Department	<a href="http://www.tid.gov.hk">http://www.tid.gov.hk</a>	<a href="mailto:enquiry@tid.gov.hk">enquiry@tid.gov.hk</a>
投資推廣署 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> (此網站由投資推廣署及廣東省對外貿易經濟合作廳共同管理) (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>
香港駐粵經濟貿易辦事處 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>

有關機構和商會 Related Organisations and Associations	網站 Website	電郵地址 E-mail Address
香港旅遊發展局 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>
香港貿易發展局 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>
香港工業總會 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>
香港中華廠商聯合會 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>
香港總商會 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>
香港中華總商會 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>





