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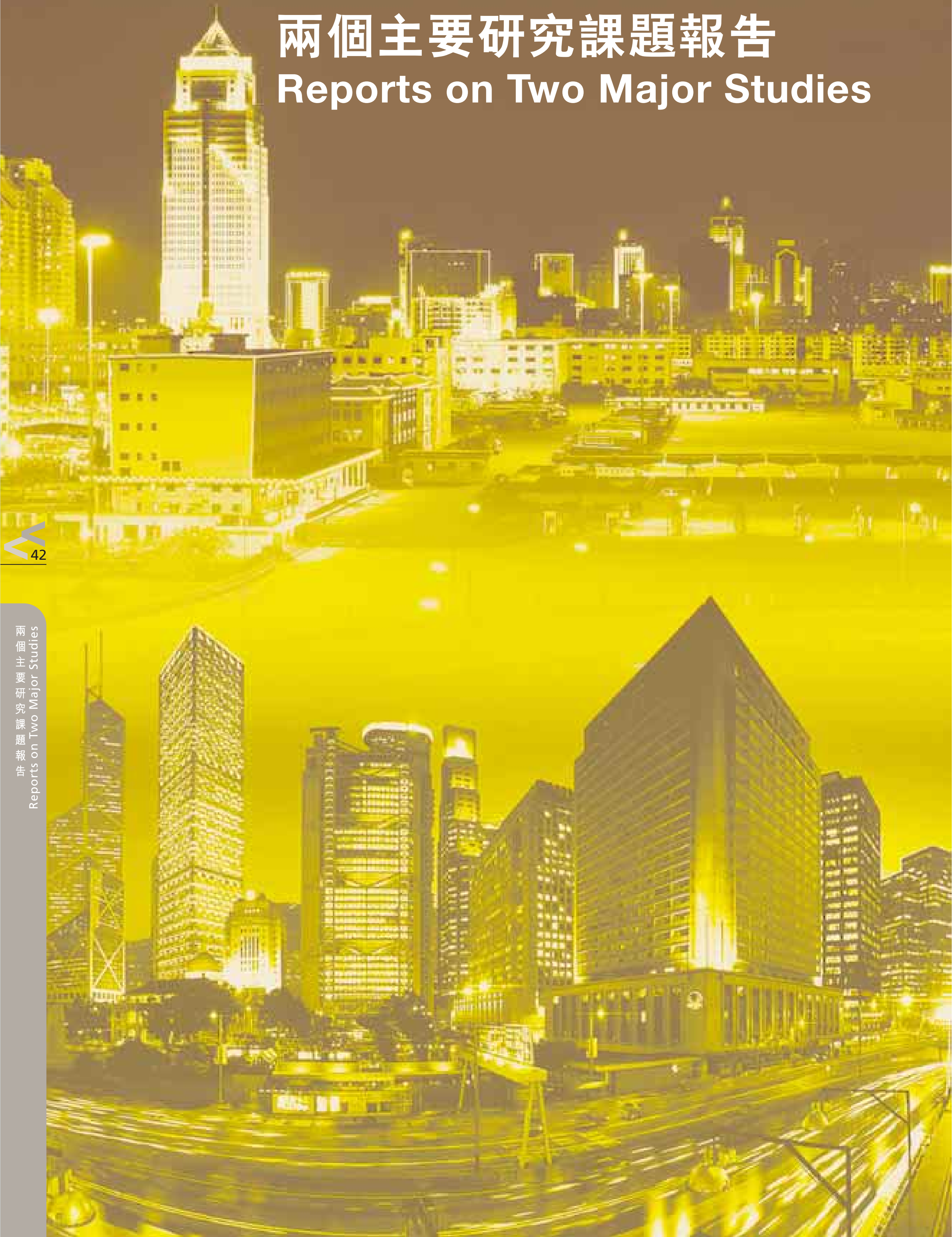

廣東省產業結構轉型為香港帶來的機遇和挑戰

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建設施和服務支援，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：

a. 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；
b. 優先鼓勵現存企業提升科技水平和創新能力；
c. 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
d. 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：

a. 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:

a. to provide Hong Kong enterprises and their Guangdong counterparts with parity treatment in policy support and market opportunities in the course of restructuring;
b. to accord priority to upgrade existing enterprises' technology level and innovation capability;
c. to increase cooperation with Hong Kong in manpower training and R&D in the restructuring process; and
d. 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:

a. *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，又能提高效率和降低成本。

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 arsing 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.