



## 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。

隨着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，以改善空氣素質。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：

- a. 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。
- b. 准許持澳門"個人遊"通行證的內地旅客可以順道來港旅遊。
- c. 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新科技產業的發展，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. 珠三角西部的發展及其與香港的合作前景

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.