

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¹，並不斷加強區內的基建設施，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)¹. Sustained efforts have been made to improve the infrastructure of the area and also to strengthen its transport links with Hong Kong, Macao and eastern PRD. It was therefore envisaged that the western PRD would develop rapidly, bringing about both opportunities and challenges to Hong Kong. Against this background, Hong Kong should be fully aware of the future development of western PRD and map out strategies to capture the business opportunities and complement the development of the area.

Development Advantages and Constraints of Western PRD

After years of rapid development, eastern PRD was now facing the problem of high cost as well as shortage in land, energy and labour. Conversely, western PRD had an abundant supply of land and cheaper labour, which could provide fresh impetus and enormous development opportunities for PRD in the future.

Western PRD was also the gateway to western Guangdong and the four southwestern provinces/region of Pan-PRD, the latter being the target areas under the "Go West" Policy and the Mainland's platform for cooperation with adjoining ASEAN countries. It was envisaged that the development of western PRD could help fuel the growth of western Guangdong and the southwestern provinces/region of Pan-PRD.

In terms of industrial clusters, western PRD enjoyed advantages in traditional industries such as household appliances, metalware and machinery. A number of towns specialising in these industries had been developed. In addition, the region presented enormous development opportunities for tourism, trade and commerce, processing industries, as well as port and air services. As regards its economic structure, western PRD mainly relied on domestic investment and had a flourishing private economy which had considerable strength in innovation.

1 本研究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和發展空間。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.