

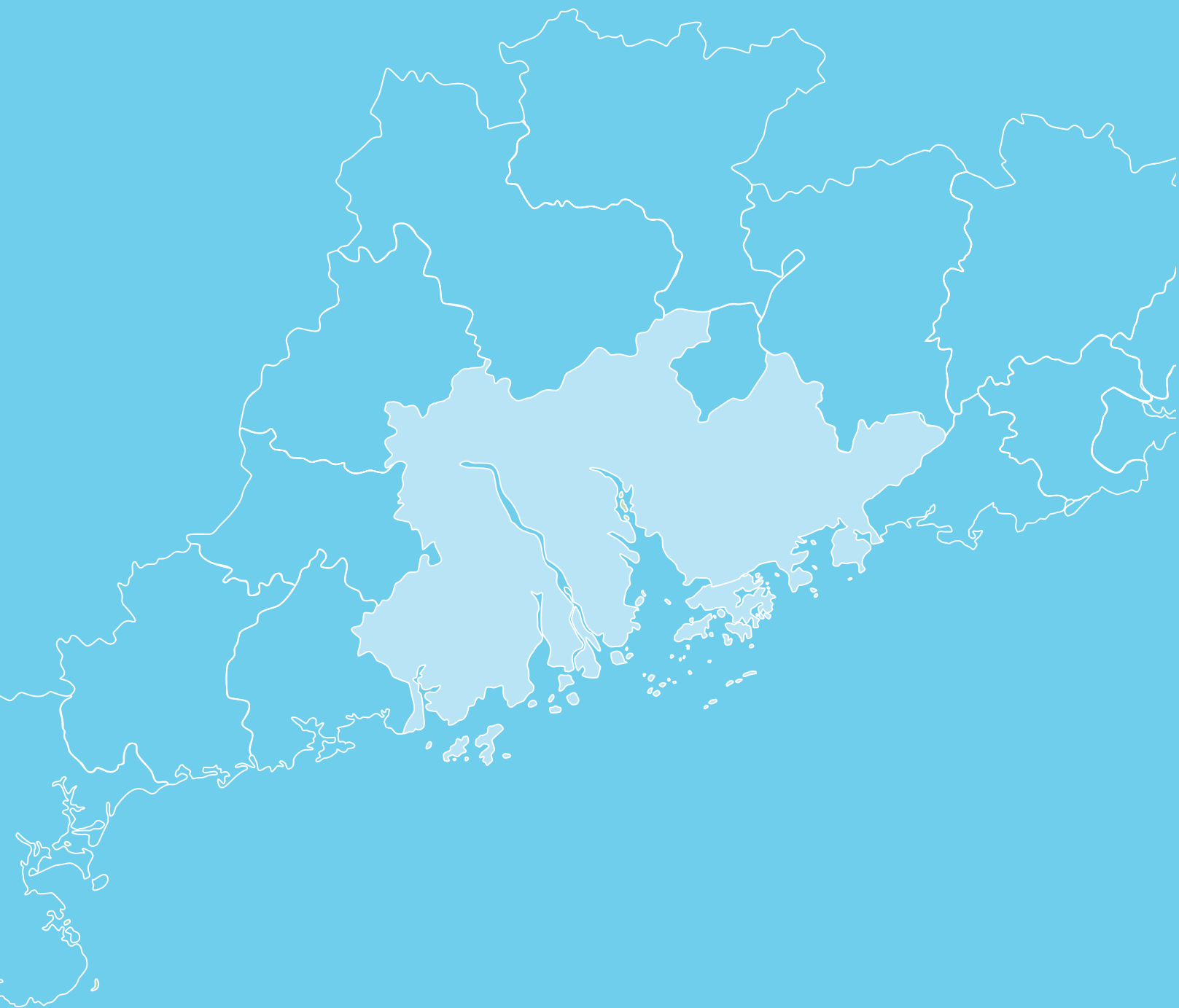
*The Greater Pearl River Delta
Business Council*

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HONG KONG
香港

2006~2007 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2006-2007年報。

商務委員會自2004年成立後，一直致力擔當粵港兩地民間機構的重要溝通橋樑，探討如何促進粵港合作的各項事宜，並向兩地政府反映意見。

去年，商務委員會繼續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就如何改善通關及促進兩地人流物流的效率，作出討論，並分別向香港及廣東省的政府部門提出意見。同時，工作小組也與「大珠江三角洲城鎮群協調發展規劃研究」小組會面，就研究的範圍和探討課題交流意見。

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為已在港開業的粵企加強支援服務。

可持續發展：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、香港總商會，以及香港商界環保大聯盟繼續合作，透過舉辦實地考察及研討會，推動在粵的企業採用清潔生產，減低耗能和污染，以改善大珠三角區內空氣質素。

服務業發展：服務業發展工作小組除了探討專業界別進入內地市場所遇到的困難外，並提出推廣香港大專院校、培訓團體及專業團體為大珠三角地區企業提供的培訓服務。工作小組正考慮設立網頁，向區內企業及其員工提供有關培訓服務的資料，同時推廣香港的培訓服務。

科技、教育及人才培訓：科技、教育及人才資源工作小組研究如何配合與家人居於內地的港人兒童的教育需要；並與服務業發展工作小組共同研究設立網頁，為大珠三角地區企業及其員工提供有關培訓服務的資料。

除此之外，商務委員會又進行研究，探討內地加工貿易政策調整對香港的影響，希望能讓香港商界掌握更多這方面的資料，以面對新政策帶來的挑戰和機遇。

內地加工貿易政策對香港的影響：自2006年開始，內地推出了很多措施，希望促進加工貿易「轉型升級」，和限制高耗能、高污染，以及資源性商品的出口。這些政策調整，對香港商界帶來很大的影響。商務委員會就這個課題作出研究，報告建議港資企業應該理解加工貿易政策調整的必要性並作出積極配合。報告認為「轉型升級」是內地和香港的共同願望，並相信市場力量會繼續推動加工貿易升級、遷移或轉型。在過程中，報告建議內地政府必須維持清晰穩定的政策大方向，並在推出具體調整前進行諮詢及提供合理的過渡適應期，並加強與香港特區的溝通。對於希望由「來料加工」改為「三資」的企業，研究建議中央及廣東省政府盡量為他們提供清晰指引及寬鬆安排。研究報告也建議香港特區政府就加工貿易政策調整加強與中央及香港商界的聯繫，並加強為企業提供市場資訊、協助更多企業發展自主品牌產品及協助紓緩企業在轉型過渡期的財政困難。

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

2007年7月31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 2007

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 2006/2007.

Since its establishment in 2004, the Business Council has served as an important platform for exchange between the private sectors of Hong Kong and Guangdong, to explore ways to promote Hong Kong/Guangdong cooperation and channel their views to the two governments.

In the past year, the Business Council continued to focus on key issues for the development of the Greater Pearl River Delta (GPRD) region. These include facilitating cross-boundary passenger and cargo flow, attracting Guangdong enterprises to Hong Kong, promoting sustainable development and enhancing cooperation in other areas.

Cross-boundary passenger and cargo flow : the Cross-boundary Passenger and Cargo Flow Sub-group has discussed and put forward its views to the HKSAR and Guangdong governments on streamlining customs clearance procedures and enhancing the efficiency of passenger and cargo flow between Hong Kong and Guangdong. The Sub-group has also met with the study group on "Coordination and Development Plan of the Greater Pearl River Delta City Cluster" to exchange views on the scope of the study and the issues to be covered.

Attracting Guangdong enterprises to Hong Kong: the Joint Investment and Trade Promotion Sub-group and its Guangdong counterpart have joined hands to organise seminars and visits to introduce Hong Kong's business environment 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 : the Sustainable Development Sub-group has continued to collaborate with the China Council for the Promotion of International Trade (CCPIT) Guangdong Sub-Council, the Guangdong Environmental Protection Industries Association, the Hong Kong General Chamber of Commerce and the Hong Kong Business Coalition on the Environment. To improve the air quality of the GPRD region, they have organised study visits and seminars through which enterprises in Guangdong are encouraged to adopt clean production and reduce energy consumption and pollution.

Services industry development : the Services Industry Development Sub-group has strived to identify the difficulties encountered by Hong Kong's professional sectors in accessing the Mainland market. Moreover, the Sub-group has put forward the idea of promoting training services provided for GPRD enterprises by tertiary institutions, training institutes and professional bodies in Hong Kong. The Sub-group is considering the creation of a webpage designed to provide training information to GPRD enterprises and their staff, so as to promote the training services of Hong Kong.

Technology, education and manpower training : the Technology, Education and Human Resources Sub-group has looked into ways to meet the educational needs of Hong Kong children residing in the Mainland with their families. The Sub-group has also worked with the Services Industry Development Sub-group to develop a webpage dedicated to disseminating information on training services for GPRD enterprises and their staff.

On top of these initiatives, the Business Council has also conducted a study to assess the impact of changes in Mainland's processing trade policy upon Hong Kong so as to enable our business sector to be better informed and prepared for the challenges and opportunities brought by the new policies.

The impact of Mainland's processing trade policy upon Hong Kong : since 2006, the Mainland authorities have introduced a number of measures to upgrade the processing trade and restrict the export of products of high pollution, high energy consumption and resource type. These policy changes have had a significant bearing upon Hong Kong's business sector. In this regard, the Business Council commissioned a study on the subject. The report recommends that Hong Kong-invested enterprises should appreciate the necessity of the adjustment of processing trade policy and take positive measures to cope with the changes. The report puts forward the view that restructuring and upgrading are the shared aspirations of the Mainland and Hong Kong, that market forces would continue to facilitate the upgrading, relocation or restructuring of the processing trade. The report also recommends that the Mainland government should maintain a clear and stable policy direction. It should also conduct consultation before introducing any specific policy changes, allow reasonable grace period, and step up communication with the HKSAR. For processing and assembling enterprises intending to convert to foreign-invested enterprises, the study recommends that the Central Authority and the Guangdong provincial government should provide clear guidelines and facilitating arrangements where possible. The study report also recommends that the HKSAR government should strengthen its communication with the Central Authority and the Hong Kong business community in relation to the policy change on processing trade. The HKSAR government should also make greater efforts to provide market information for enterprises, assist more enterprises in developing their own brand products, and help them tide over the transitional financial difficulties stemming from restructuring.

In carrying out its work, the Business Council has maintained a constructive dialogue with the two governments, the CCPIT Guangdong Sub-Council and its sub-groups. We will continue to enhance 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

包括廣州、深圳、東莞、佛山、江門、中山、珠海、惠州和肇慶在內的珠三角地區，雖然僅佔全國土地面積0.4%和普查人口之3.2%，但在2005年卻佔國內生產總值之9.8%、總出口的29.8%，地區的外來直接投資佔內地總額的19.1%。

近年，廣東省的產業結構轉型，並朝著重工業和高增值產業方向發展。作為廣東省的經濟樞紐，珠三角地區的產業增值額在2005年佔全省的86.5%，重工業的比重由1987年的43.4%增至2005年的59.6%。其中電子信息、電器用品及機械工業和石油化工等行業的發展最為蓬勃。此外，珠三角地區的第三產業也正急速發展，在地區生產總值的比重由1987年的28.9%，提高至2005年的46.3%。根據在廣東省「十一五」規劃，廣東省將在2006-2010年間加快服務業的發展。

內地在2006年下半年開始，發布了加工貿易政策的調整，取消或降低對某些產品的出口退稅，並擴大加工貿易禁止類商品目錄，新規定旨在促進加工貿易「轉型升級」和控制「兩高一資」。為了協助企業轉移，廣東省政府自2006年開始，在珠三角區域與廣東省山區和東西兩翼地區，設立了18個產業轉移園區，在土地、供電、基礎設施給予支援。

An Overview of Recent Developments in the PRD

The Pearl River Delta (PRD) region, which includes Guangzhou, Shenzhen, Dongguan, Foshan, Jiangmen, Zhongshan, Zhuhai, Huizhou and Zhaoqing, encompasses only 0.4% of China's landmass and 3.2% of the census population, yet it accounted for 9.8% of the gross domestic product (GDP), 29.8% of total exports, as well as 19.1% of total foreign direct investment in 2005.

Guangdong has undergone an industrial restructuring in recent years, gearing its industrial structure towards heavy and high value added industries. As the economic hub of Guangdong, the PRD region accounted for 86.5% of the value added of industry of the whole province in 2005. The proportion of heavy industries in the PRD increased from 43.4% in 1987 to 59.6% in 2005, with electronic information, electrical appliances and machinery and petrochemicals among the fastest growing industries. At the same time, the tertiary industry in the PRD has also been developing in leaps and bounds, as evidenced by its share in the provincial GDP which increased from 28.9% in 1987 to 46.3% in 2005. According to Guangdong's 11th Five Year Plan, the province will expedite the development of the services sector in the period 2006 - 2010.

Starting from the latter half of 2006, the Central Government announced changes on processing trade policy, which were introduced to remove or reduce the export tax rebate for certain products and expand the list of prohibited category under processing trade. The new rules aimed at restricting the export of high pollution, high energy consumption and resource consumption products while encouraging the upgrading of the processing trade at a faster pace. To fulfill these objectives, the Guangdong Government has, since 2006, set up 18 industry relocation parks in the PRD region as well as the mountainous regions and the eastern and western parts of Guangdong. Support in land use, electricity supply and infrastructure facilities have also been offered to enterprises to facilitate their relocation.

The HKSAR and Guangdong Governments have been collaborating actively in recent years to improve the cross-boundary infrastructure with a view to facilitating mutual



年報摘要 Executive Summary

近年，香港特區和廣東省兩地政府亦積極合作改善跨境建設，以增強兩地融合及提升雙方的競爭力。深港西部通道已於2007年7月開通，成為第四條連接兩地的跨境行車通道；上水落馬洲支線及配套设施亦將於2007年落成啟用，以紓緩羅湖口岸過境旅客擠塞和應付日益繁重之過境鐵路旅客的需求。另外，香港將會發展由西鐵錦上路站伸延至落馬洲站的北環線，為新界西部提供直接通往邊界的鐵路服務；並正積極研究廣深港高速鐵路香港段，以及繼續推動港珠澳大橋項目的落實。

至於深港合作方面，香港特區和深圳市政府均認同兩地必須強化不同領域的交流和合作，其中創新科技更是兩地合作的主要領域之一。隨著深港政府在2007年5月簽署「深港創新圈」合作協議，兩地政府將致力加強創新科技方面的資訊及資源交流，長遠目標是把深港這兩個毗鄰地區建設為創新科技活動的世界級地區樞紐。

商務委員會

商務委員會的第二屆任期為2006年3月1日至2008年2月29日。商務委員會的主席由馮國經博士擔任，另有31位委員。

商務委員會共成立了五個工作小組，致力探討粵港合作的各個主要課題。五個小組包括：

1. 跨境人流物流工作小組
2. 服務業發展工作小組
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、人才資源工作小組

integration and enhancing competitiveness of both places. The Hong Kong-Shenzhen Western Corridor, the fourth vehicular boundary crossing between Hong Kong and the Mainland, has come into operation in July 2007. The Sheung Shui to Lok Ma Chau Spur Line and its supporting facilities will also be commissioned in 2007 to relieve the congestion of cross-boundary passengers at Lo Wu and meet the growing demand of cross-boundary rail passenger traffic. In addition, the existing west rail at Kam Sheung Road Station will be extended to Lok Ma Chau Station to form the Northern Link to provide direct rail services between the New Territories and the boundary. At the same time, studies are being conducted on developing the Hong Kong section of the Guangzhou-Shenzhen-Hong Kong Express Rail Link, and to push ahead the development of the Hong Kong-Zhuhai-Macao Bridge.

On Hong Kong-Shenzhen cooperation, both governments have agreed on the need to step up exchange and cooperation in various domains between the two places. One of the major areas of cooperation is innovation and technology. With the signing of the cooperation agreement on "Shenzhen/Hong Kong Innovation Circle" in May 2007, the two governments will strive to enhance exchanges in information and resources in innovation and technology. The long-term target is to develop the two neighbouring localities into a world-class regional hub for innovation and technology activities.

The Business Council

The Business Council's second term of office runs from 1 March 2006 to 29 February 2008. The Business Council is chaired by Dr Victor Fung and comprises 31 Members.

Five Sub-groups have been formed under the Business Council to study the major issues surrounding Hong Kong/Guangdong cooperation. The five Sub-groups are:

1. Cross-boundary Passenger and Cargo Flow Sub-group;
2. Services Industry Development Sub-group;
3. Sustainable Development Sub-group;
4. Joint Investment and Trade Promotion Sub-group; and
5. Technology, Education and Human Resources Sub-group.

此外，商務委員會成立由委員、香港主要商會代表、有關業界及學術界人士組成的「內地加工貿易政策對香港的影響」專責小組，就去年中央政府發布有關加工貿易政策的措施展開調研工作，探討這些政策調整對香港工商界的影響，並作出建議。

工作小組的工作

1. 跨境人流物流工作小組

去年小組的工作重點包括：

i. 使用深港西部通道的安排

工作小組建議深港西部通道在2007年開通後，准許現時持有沙頭角和文錦渡口岸「封閉道路通行證」的車輛，同時使用深港西部通道。小組亦建議為經常往返內地的持外國護照商人提供便利通關。

ii. 落馬洲口岸車輛過關

工作小組建議於陸路口岸增設「沒有載客」車輛專用通道，並簡化入境處及海關檢查。

iii. 旅客簽證問題

工作小組建議取消限制，讓持澳門通行證的內地旅客可以順道來港；而對於那些持「指定起落點」機票前往內地的旅客，工作小組建議可減低多程出入中國簽證費用，以鼓勵更多旅客順道來港。

iv. 提升跨境人流貨流效率

工作小組向廣東省口岸辦公室建議粵港政府考慮在各個口岸逐步全面實施「一地兩檢」、開通跨境直昇機服務、以「跨境過路費」取代發牌控制跨境車輛流量，和晚間在皇崗口岸開放更多通道，疏導跨境貨車。

2. 服務業發展工作小組

隨着 CEPA 措施逐步落實，工作小組去年繼續探討業界在進入內地市場時遇到的問題，包括在內地辦理營業手續時的困難、進入內地市場的門檻過高、兩地專業人士不同的執業觀念等。

In addition, a Task Group on the "Impact of Mainland Processing Trade Policy on Hong Kong", consisting of Business Council Members, representatives of major chambers of commerce, relevant industries and academia in Hong Kong, has been formed under the Business Council to undertake studies and researches on the policy adjustment on processing trade announced by the Central Government last year so as to assess the impacts of these policy changes upon the industrial and business sectors of Hong Kong and make recommendations accordingly.

Work of the Sub-groups

1. Cross-boundary Passenger and Cargo Flow Sub-group

Last year, the Sub-group focused its efforts on the following areas:

i. Arrangements on the use of the Hong Kong-Shenzhen Western Corridor

The Sub-group proposed that vehicles with Closed Road Permits of the Sha Tau Kok and Man Kam To Control Points should be allowed to use the Hong Kong-Shenzhen Western Corridor after it came into operation in 2007. The Sub-group also put forth the proposal of facilitating customs clearance for businessmen with foreign passports travelling frequently between Hong Kong and the Mainland.

ii. Vehicle clearance at the Lok Ma Chau Control Point

The Sub-group put forward the idea of assigning dedicated corridors at land boundary crossings for vehicles with no passengers and streamlining immigration and customs clearance.

iii. Visa related issues

The Sub-group proposed removing the restrictions on Mainland residents visiting Macao with a "Macao only" permit with a view to facilitating their visit to Hong Kong on the same trip. For overseas visitors who used "point-to-point" tickets into the Mainland, the Sub-group proposed a reduction in the multiple-entry visa fee for them in order to encourage more overseas visitors to the Mainland to make a side trip to Hong Kong.

iv. Enhancing the efficiency of cross-boundary passenger and cargo flow

The Sub-group put forward a number of proposals to the Port Administration Office of Guangdong Province, which include full implementation of co-location clearance progressively at all boundary control points for the HKSAR and Guangdong Governments' consideration; introduction of cross-boundary helicopter service; replacement of the existing licensing arrangements with the practice of levying of a "cross-boundary toll" as a means of cross-boundary traffic control; and opening of additional customs clearance lanes at the Huanggang Control Point at night to accommodate truck traffic.

工作小組亦與科技、教育及人才資源工作小組合作，致力把香港發展成為大珠三角區域的知識樞紐。小組正與貿易發展局探討設立一個網頁，讓香港的大專學院、專業機構和相關團體登載他們為珠三角企業員工提供的培訓課程，以吸引他們更多使用香港提供的培訓服務。

3. 可持續發展工作小組

小組去年工作重點如下：

i. 清新空氣約章

工作小組在去年繼續聯同香港總商會、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，推動大珠三角地區內企業簽署《清新空氣約章》，並鼓勵在區內設廠的粵港企業參與潔淨生產計劃。

ii. 參觀潔淨生產企業

工作小組與香港總商會、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於2007年3月組織考察團到廣東省參觀一家港資企業的生產線、熱電發電廠及污水處理廠等設施，藉此了解珠三角廠商如何運用環保潔淨科技和管理模式，控制生產過程中污染源的排放，並希望以這個成功經驗作為例子，推動區內的環保潔淨生產。

4. 聯合投資貿易推廣工作小組

工作小組去年的工作重點如下：

i. 吸引廣東省民營企業來港開業

工作小組於2006年5月及12月，與粵方工作小組、投資推廣署及駐粵辦合辦兩個廣東企業赴港考察團，分別有40及60家從事不同行業的廣東企業參與。考察活動的目標，是讓企業代表了解在港開業的審批程序、香港特區政府部門的運作以及本地專業團體和商會提供的支援。

2. Services Industry Development Sub-group

With the implementation of CEPA measures, the Sub-group made continued efforts in the past year to examine problems encountered by the industry when making inroads into the Mainland markets, including difficulties in going through the formalities required for business operation, high entry threshold, and differences in the mode of operation for professional practice in Hong Kong and the Mainland.

The Sub-group also worked in collaboration with the Technology, Education and Human Resources Sub-group to consider measures to turn Hong Kong into a knowledge hub for the Greater Pearl River Delta (GPRD) Region. The Sub-group and the Hong Kong Trade Development Council are making joint efforts to create a webpage for the tertiary institutions, professional bodies and relevant organisations in Hong Kong onto which they can upload their training programmes for staff of PRD enterprises to make greater use of the training services provided by Hong Kong.

3. Sustainable Development Sub-group

In the past year, the Sub-group focused its efforts on the following areas:

i. Clean Air Charter

Last year, the Sub-group continued to work with the Hong Kong General Chamber of Commerce (HKGCC), Hong Kong Business Coalition on the Environment (HKBCE), China Council for the Promotion of International Trade (CCPIT) Guangdong Sub-Council and the Guangdong Environmental Protection Industries Association (GEPIA) to encourage enterprises in the GPRD region to sign the Clean Air Charter and to urge both Hong Kong and local manufacturers in the region to join the scheme of clean production.

ii. Study visit to a clean production enterprise

In March 2007, the Sub-group, HKGCC, HKBCE, CCPIT Guangdong Sub-Council and GEPIA organised a joint study visit to the facilities of a Hong Kong-invested enterprise in Guangdong Province, including its production lines, thermal power plant and wastewater treatment plant. The visit aimed to gain an understanding of how environmental friendly and clean production technology and management model were employed by PRD manufacturers to control the emissions of polluting sources in the course of production. It was hoped that this successful case could be held up as an example to promote clean production in the region.

4. Joint Investment and Trade Promotion Sub-group

In the past year, the Sub-group focused its efforts on the following areas:

i. Attracting Guangdong privately-owned enterprises to set up business in Hong Kong

In May and December 2006, the Sub-group, together with

此外，工作小組等亦在2006年8月在佛山舉辦第二次赴港投資實務宣講會，為廣東省企業提供來港開業的實用資訊，講者包括香港特區政府人員、銀行、法律及會計行業的專家。

ii. 方便經商人士往來

工作小組繼續與香港特區政府相關部門探討簡化廣東省投資者來港的入境程序。工作小組將繼續探討如何鼓勵內地專業人士和人才來港創業。

iii. 機構支援

工作小組現正與在港的有關機構或商會共同探討可否在香港成立商會，為已在港開業的內地企業提供最佳的支援服務。

5. 科技、教育及人力資源工作小組

工作小組去年的工作重點如下：

i. 在教育及人才培訓方面，工作小組去年研究了兩個課題：

- 一、隨着留粵工作的港人日增，其子女對教育的需求也在增加。工作小組正探討如何配合這方面的需要，中央政策組亦將對此課題進行研究。
- 二、工作小組經與服務業發展工作小組共同研究後，認為可以設立網頁，集中處理香港院校及有關團體為珠三角企業提供的課程的資訊。這項計劃將由服務業發展工作小組跟進。

ii. 科技

工作小組支持香港特區政府和深圳市政府合力建立「深港創新圈」，並對下一步可以深化粵港兩地科技合作的措施，提供商業角度的參考意見。工作小組期望計劃能在加強科技發展合作和支援應用研發項目上取得佳績，有助推動大珠三角區域的經濟發展。

its Guangdong counterpart, Invest Hong Kong and the Hong Kong Economic and Trade Office in Guangdong (GDETO) co-organised two study visits to Hong Kong for delegations comprising 40 and 60 Guangdong enterprises respectively from various trades. The visits aimed at familiarising the delegates with the procedures for setting up business in Hong Kong, the operation of the HKSAR government departments, as well as the support offered by local professional bodies and chambers of commerce.

In August 2006, the Sub-group and its Guangdong counterpart held the second Hong Kong Investment Promotion Seminar in Foshan, through which practical information on how to set up business in Hong Kong was made available to Guangdong enterprises. The speakers included representatives of the HKSAR government and experts in the banking, legal and accounting professions.

ii. Facilitating movement of business persons

The Sub-group continued to discuss with the relevant HKSAR government departments on ways to streamline procedures for Guangdong investors to travel to Hong Kong. The Sub-group would further its efforts to explore how to encourage Mainland professionals and talents to set up business in Hong Kong.

iii. Institutional support

The Sub-group is engaged in discussion with relevant organisations and chambers of commerce in Hong Kong to explore the idea of setting up a chamber of commerce in Hong Kong to provide Mainland enterprises operating in Hong Kong with better support services.

5. Technology, Education and Human Resources Sub-group

In the past year, the Sub-group focused its efforts on the following areas:

i. On education and human resources training, the Sub-group worked on the following two issues last year:

- (a) The increasing number of Hong Kong residents working in Guangdong had led to an increase in their children's demand for education. The Sub-group was exploring ways to meet educational service needs of these children. The Central Policy Unit will also undertake a study on the matter.
- (b) A joint study by the Sub-group and the Services Industry Development Sub-group recommended the creation of a webpage to provide information on training programmes offered by tertiary institutions and relative organisations in Hong Kong for the benefit of PRD enterprises. This project will be followed up by the Services Industry Development Sub-group.

專題研究 — 「內地加工貿易政策對香港的影響」

內地在2006年底至2007年初，發布多項措施，加強對加工貿易的管理，包括降低或取消部分產品之出口退稅，並擴大加工貿易禁止類商品目錄的政策，對不能以加工貿易方式進出口的商品再作增減。同時將環保及能耗等指標納入核查範圍，作為對企業開展加工貿易業務的審批依據，建立加工貿易企業准入制度。報告認為這些政策調整是國家既定的政策方向和目標，目的是要促進加工貿易「轉型升級」和控制「兩高一資」（即高能耗、高污染、資源性）。

據內地統計，全中國現有加工貿易企業九萬多家，在廣東有超過七萬家。據估計，全廣東省在加工貿易企業的就業人員超過1 600萬人。2006年加工貿易進出口總額達到8,319億美元(66,327億人民幣)，佔中國對外貿易總額47.2%。而港商在內地的企業從事加工貿易非常普遍。因此，有關加工貿易政策的調整，將會對香港有很大的影響。

報告認為大部分港資企業明白國家對加工貿易進行調整的必要性並願意配合，亦認同轉型和升級才是長遠的發展方向。但是，港商要應付這些政策調整，不管是發展品牌、創新或遷移，均需大量資金。不少港商缺乏財政資源，特別是「來料加工」廠，較難向銀行取得貸款作轉型升級之用。即使港商的財政得以解決，但目前加工貿易政策前景未明，廠商亦不敢作長線投資。

ii Technology

The Sub-group supported the joint establishment of the Shenzhen/Hong Kong Innovation Circle by the HKSAR and Shenzhen Municipal Governments, and put forward its views based on a business perspective on further initiatives to deepen the Hong Kong/Guangdong technological collaboration. It was hoped that the Shenzhen/Hong Kong Innovation Circle could go a long way towards strengthening their cooperation in technology development and supporting applied research and development projects, which would in turn facilitate the economic development in the GPRD region.

Research Study - Impact of Mainland Processing Trade Policy on Hong Kong

Between late 2006 and early 2007, the Central Government announced a number of measures to tighten up the regulation of processing trade. These measures, which included reduction or removal of export tax rebate for certain products and expansion of the list of prohibited category under processing trade, aimed at further adjusting the list of products prohibited from import and export through processing trade. In parallel, indicators of environmental protection and energy consumption, among others, were included as criteria for approval of application for operation as processing trade. The report concluded that these policy changes were in line with the established national policy directions and targets for the purpose of facilitating the restructuring and upgrading of the processing trade and regulating high pollution, high energy and resource consumption activities.

According to Mainland statistics, there are more than 90 000 processing trade enterprises in China at present. Over 70 000 are operating in Guangdong with an estimated workforce of over 16 million workers. In 2006, the total volume of import and export of processing trade reached US\$ 831.9 billion (RMB 6,632.7 billion), accounting for 47.2% of China's total foreign trade. As many Hong Kong-invested enterprises in the Mainland engage in processing trade, the policy adjustment on processing trade will have significant impact on Hong Kong.

The report shows that the majority of Hong Kong-invested enterprises appreciate the necessity of the policy adjustments and are willing to go along with the changes. They are also convinced that restructuring and upgrading is the direction of long-term development. Nevertheless, enormous investment is required to cope with the policy changes, whether by development of brand-name products, innovation or relocation. Many Hong Kong operators lack the necessary financial resources, particularly the processing factories which have greater difficulty in securing bank loans for upgrading their business. Even if their financial problems can be taken care of, the factory operators will still be hesitant to make any long-term investments in view of the uncertainty of the processing trade policy at this stage.

對於仍以「來料加工」形式在珠三角生產和出口的港商來說，他們目前若要改以一般貿易方式生產和發展內銷，必須由「來料加工」改為「三資企業」。但目前內地對這些企業改為「三資企業」沒有明確一致的審批程序和手續，而且辦理有關手續需時，影響了正常生產。

為了協助企業面對政策調整帶來的困難及轉型升級，報告建議內地政府維持清晰穩定的政策大方向，並在推出具體政策調整前進行諮詢及提供合理過渡適應期，並加強與香港特區政府的溝通。另外，報告亦建議內地政府可以提供配套安排和協助，幫助企業由「來料加工」轉為「三資企業」，並鼓勵內銷。同時，報告建議內地政府可以考慮接受加工企業以「銀行保證」或「保險保單」為台帳保證金；以及支持加工企業在轉型時多作「自主創新」方面的投資。

報告建議廣東省政府提供「一站式」諮詢服務，協助企業加快辦理「來料加工」轉為「三資企業」的申請；及加快興建設有中央排污設施的環保園，讓企業作搬遷的選擇。

報告建議香港特區政府及有關機構加強與中央及香港商界聯繫，就加工貿易政策調整，做好溝通和諮詢工作。另外，香港特區政府與有關機構可以加強為企業提供市場資訊、協助更多企業發展自主品牌產品及調整現有的「中小企業信貸保證計劃」，協助紓緩轉型企業在過渡期的財政困難。

For Hong Kong business operators in the PRD who are still engaged in production and export through "processing with supplied materials", they must change their mode of operation to "foreign-invested enterprise" (FIE) if they wish to switch their operation to production under general trade mode and/or gear towards domestic market. However, at present, the Mainland does not have a set of clear and standard approval procedures and protocol of transformation for these enterprises. Besides, it takes time to go through the formalities concerned and this will affect their daily operation.

To help enterprises cope with the difficulties brought by the policy adjustment and undertake restructuring and upgrading, the report recommends the Central Government should maintain a clear, consistent policy direction, carry out advance consultation before introducing policy adjustments, allow for reasonable transition periods, and strengthen communication with the HKSAR Government. The report also suggests the Central Government to offer facilitating arrangements and assistance to help enterprises switch to FIEs and to encourage domestic sale. The report also recommends the Central Government to consider accepting "bank guarantee" or "insurance policy" from processing trade enterprises as customs duty deposit and supporting processing trade enterprises in order to alleviate their cash flow problem caused by the "actual payment" requirement and to encourage enterprises to direct their investments more towards pursuits of innovation in the process of restructuring.

The report recommends the Guangdong Government to provide "one-stop" consulting services for enterprises engaged in processing with supplied materials to facilitate their applications for switching to FIEs, and to speed up the construction of green industrial parks equipped with central sewerage disposal facilities as an option for relocation.

The report also recommends that the HKSAR Government and relevant organisations should strengthen their communication with the Central Government and the Hong Kong business community to strengthen communications on matters related to the policy realignment on processing trade. Besides, the HKSAR Government and relevant organisations can step up efforts to provide market information for enterprises, assist more enterprises in developing their own brand-name products, and finetune the existing "SME Loan Guarantee Scheme" to help enterprises tide over the transitional financial difficulties stemming from their restructuring.

商務委員會的對外聯繫

在過去一年，商務委員會及其工作小組與粵港政府、廣東省貿促會、兩地的商界組織、學術界及香港的專業團體等保持緊密的聯繫。

去年的主要聯繫活動包括：

- 跨境人流物流工作小組，在2006年5月與廣東省口岸辦招玉芳主任會面，就提升口岸通關效率提出意見。
- 馮國經主席在2006年6月與廣東省貿促會葉耀會會長會面，商討兩會的合作事宜。
- 商務委員會在2006年7月舉辦了簡報會，由香港特區政府律政司講解有關香港與內地法院交互強制執行民商事判決的安排。
- 馮國經主席於2006年8月的粵港合作聯席會議第九次會議上，匯報了商務委員會的工作進度和未來工作重點。
- 聯合投資推廣工作小組與廣東省聯合投資小組、投資推廣署及駐粵辦分別在2006年5月和12月，合辦了兩次「廣東省民營企業赴港考察團」，推動了廣東民企到港開業。有關機構並於2006年8月在佛山舉辦了「赴港投資實務宣講會」，向廣東民企介紹到港開業的手續。
- 商務委員會與貿易發展局、香港的主要商會、廣東省貿促會在2006年11月就廣東省產業轉型和珠三角西部發展的議題，舉辦了大型研討會。
- 可持續發展工作小組與廣東省貿促會、廣東省環保產業協會、香港總商會和香港商界環保大聯盟在2007年3月組織了「清潔生產考察團」，參觀珠三角的一家港資企業，了解該企業的減排措施。

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 Business Council

In the past year, the Business Council and its Sub-groups maintained close liaison with the HKSAR and Guangdong Governments, CCPIT Guangdong Sub-Council, business organisations and academia of the two places as well as professional bodies in Hong Kong.

Major liaison activities in the past year included:

- In May 2006, the Cross-boundary Passenger and Cargo Flow Sub-group met Ms Zhao Yufang, the Director General of the Port Administration Office of Guangdong Province to put forward its views on ways to enhance operational efficiency at boundary crossings.
- In June 2006, Council Chairman Dr Victor Fung met Mr Ye Yao, the President of CCPIT Guangdong Sub-Council, for discussion on the cooperation between the two Councils.
- In July 2006, the Business Council arranged a briefing by the Department of Justice of the HKSAR Government on the Arrangement on Reciprocal Enforcement of Judgments in Civil and Commercial Matters by the Courts of the Mainland and of the Hong Kong Special Administrative Region.
- At the ninth plenary meeting of the Hong Kong/Guangdong Cooperation Joint Conference held in August 2006, Council Chairman Dr Victor Fung reported the Council's work progress and work plan.
- In May and December 2006, the Joint Investment and Trade Promotion Sub-Group, together with Guangdong's GPRD Investment and Trade Promotion Sub-Group, Invest Hong Kong and GDETO, co-organised two study visits for delegations of Guangdong's privately-owned enterprises (POEs) to Hong Kong. The visits were designed to attract Guangdong POEs to set up business in Hong Kong. In August 2006, the two Sub-groups organised in Foshan a Hong Kong Investment Promotion Seminar to brief participants from Guangdong POEs on the procedures for setting up business in Hong Kong.
- In November 2006, the Business Council co-organised with the Trade Development Council, major chambers of commerce in Hong Kong and the CCPIT Guangdong Sub-Council a large scale seminar on Guangdong's industrial restructuring and development of western Pearl River Delta.
- In March 2007, the Sustainable Development Sub-group, together with the CCPIT Guangdong Sub-Council, the GEPIA, HKGCC and HKBCE, co-organised a clean production visit to a Hong Kong-invested enterprise in the PRD to see its emission reduction facilities.

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.



今年，粵港合作聯席會議將舉行第十次會議。在過去十年，香港與廣東省無論在經濟和社會發展方面的融合，均是與日俱增。作為粵港合作聯席會議框架下成立的商界組織，大珠三角商務委員會在過去三年，一直致力推動香港與內地的民間交流和合作，就粵港合作的各個範疇，提出了不少具體及有建設性的建議。

商務委員會匯聚香港多個主要界別的代表，研究粵港合作的課題。除了關注提升處理跨境人流貨流的效率、鼓勵廣東省民營企業來港開業、協助香港專業服務業進入內地市場，及促進可持續發展外，商務委員會在去年更積極探討廣東省經濟未來的發展方向，尤其在「十一五」規劃下的最新發展及對香港的影響，以及研究內地加工貿易政策對香港的影響等。這些課題，對於香港的未來發展，具有重大意義。



作為政府與商界之間的橋樑，商務委員會成功地聯繫了香港的商界，向粵港政府反映商界的關注，並提出了具體建議。商務委員會亦積極與廣東省貿促會合作，鼓勵粵港企業採用清潔生產技術，減低排污以改善大珠三角區內的空氣質素。此外，兩會在鼓勵廣東省民營企業來港開業的工作，也很有成效。

面對國家加入世界貿易組織後的開放政策，和廣東省在「十一五」規劃下的新發展，我期望商務委員會能繼續發揮香港商界靈活應變，以及極具創意的精神，支持及推動粵港合作。



唐英年
香港特別行政區政務司司長
二零零七年七月

香港特別行政區
政務司司長唐英年先生, GBS, JP
The Honourable Henry Tang, GBS, JP
Chief Secretary for Administration
Hong Kong Special Administrative Region

This year, the Hong Kong Guangdong Cooperation Joint Conference (Joint Conference) will hold its Tenth Plenary. Over the past ten years, the economic and social integration between Hong Kong and Guangdong has been gaining momentum. As a business committee established under the framework of the Joint Conference, the Greater Pearl River Delta Business Council (Business Council) has made enormous efforts in the past three years to promote private sector exchanges and cooperation between Hong Kong and the Mainland, putting forward a number of concrete and constructive proposals in a wide spectrum of areas of Hong Kong/Guangdong cooperation.

The Business Council brings together talents representing various major sectors of Hong Kong to carry out studies on issues related to Hong Kong/Guangdong cooperation. These include enhancing efficiency in handling cross-boundary passenger and cargo flows, attracting Guangdong's privately-owned enterprises to set up business in Hong Kong, assisting Hong Kong's professional services sector to gain access to the Mainland market and fostering sustainable development. Last year, the Business Council was also actively engaged in exploring the direction for Guangdong's future economic development, in particular its latest developments under the 11th Five-Year Plan and their implications for Hong Kong, as well as the impact of the Mainland's processing trade policy on Hong Kong. These issues are of significant

importance to Hong Kong's future development.

As a bridge between the Government and the business community, the Business Council has been successful in liaising with Hong Kong's business sector and bringing their concerns and concrete recommendations to the Hong Kong and Guangdong Governments. The Business Council has also worked in active collaboration with the China Council for the Promotion of International Trade Guangdong Sub-Council to encourage Hong Kong/Guangdong enterprises to adopt clean production technology to reduce emissions, with a view to improving air quality in the Greater Pearl River Delta region. Furthermore, the two Councils have made impressive achievements in attracting Guangdong's privately-owned enterprises to set up business in Hong Kong.

To tie in with the opening-up policy of China after its accession to the World Trade Organisation and the latest developments in Guangdong under the 11th Five-Year Plan, I look forward to the Business Council's continued efforts in supporting and promoting Hong Kong/Guangdong cooperation through the display of resilience and innovation, the legendary traits of the business community in Hong Kong.



Mr Henry Tang
Chief Secretary for Administration of HKSAR
July 2007



大珠三角商務委員會是粵港民間合作的重要機構，自成立以來為推動粵港合作發展做了大量有效工作。過去的2006年，大珠三角商務委員會緊緊圍繞粵港雙方達成的共識及合作重點，積極推動CEPA框架下的粵港合作，大力推進香港生產性專業服務與廣東製造業相結合和大珠三角區域經濟整合的研討合作，並在加強粵港清新空氣合作、幫助廣東企業走出去和支持在粵港資企業產業轉移等方面建言獻策，為粵港合作的深化發展作出了積極貢獻！2006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3500億美元。粵港服務業、旅遊、大型基礎設施、科技、文化等合作全面推進、成果豐碩。這些成績的取得，香港大珠三角商務委員會功不可沒！藉香港大珠三角商務委員會2006-2007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！

加強合作、攜手共進是粵港兩地政府和社會各界的共識。今年是香港回歸祖國十周年，進一步加強粵港合作意義重大、時機大好、商機無限、前景廣闊。希望大珠三角商務委員會在香港特區政府的領導下，進一步發揮“溝通、研討、建議、促進”的作用，為促進粵港合作和兩地共同繁榮發展作出新的貢獻！

廣東省人民政府常務副省長
二零零七年六月



廣東省人民政府常務副省長湯炳權先生

Mr Tang Bingquan
Executive Vice-Governor
People's Government of
Guangdong Province

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 cooperation and development between both places. In 2006, the Business Council has, building on the consensus and key areas of cooperation between the two places, strived to promote Guangdong/Hong Kong cooperation under CEPA, to foster the integration between Hong Kong's producer professional services and Guangdong's manufacturing industries and to promote the collaboration of research on the regional economic integration of Greater Pearl River Delta (GPRD) as a whole. The Business Council also provided advice and made proposals on various agendas, such as strengthening Guangdong/Hong Kong collaboration in taking forward the clean air initiatives, facilitating Guangdong enterprises' "go global" process, and assisting the relocation of Hong Kong's manufacturing enterprises in Guangdong. Its significant contributions had gone a long way towards enhancing Guangdong/Hong Kong cooperation. The total value of imports and exports between Guangdong and Hong Kong in 2006 reached an all-time high of more than US\$350 billion after successive growths in recent years. Guangdong/Hong Kong cooperation is also moving forward in various areas including services industry, tourism, major infrastructural development, technology

and culture. These outstanding achievements are attributable in no small part to the Business Council's work. On behalf of the People's Government of Guangdong Province, I wish to extend our warmest congratulations on the publication of the 2006-07 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.

It is a consensus between the governments and people of both places that Guangdong and Hong Kong should move ahead hand in hand on the basis of enhanced collaboration. This year marks the 10th anniversary of the reunification of Hong Kong with our Motherland. This is a momentous and golden time to enhance the cooperation between the two places, in view of the immense business opportunities and the promising future. I hope the Business Council, under the leadership of the HKSAR Government, will play an even greater role in "enhancing mutual communication, engaging dialogues, making recommendations and conducting facilitation" with a view to achieving new successes in promoting the cooperation, prosperity and development of Guangdong and Hong Kong.



Mr Tang Bingquan
Executive Vice-Governor
People's Government of Guangdong Province
June 2007

An aerial photograph of Hong Kong, showing the dense urban landscape, the Victoria Harbour, and the surrounding mountains. A large teal geometric shape, resembling a stylized 'X' or a large arrow, is overlaid on the left side of the image. The text '主席報告' and 'Chairman's Statement' is positioned within this teal area.

主席報告

Chairman's Statement

引言

粵

港合作開展多年；自內地於1978年經濟改革以來，兩地關係日趨緊密。時至今日，在粵的港資企業超過9萬家。香港在省內的累計實際直接投資額達到1,054億美元。

大珠三角商務委員會(商務委員會)於2004年3月成立，專責促進香港與珠三角地區在經濟上更緊密合作。商務委員會是一個民間機構，與特區政府和廣東省政府協力推動粵港合作。

過去數年，商務委員會一直與廣東省的對口機構——廣東省貿促會充分合作，加強兩地的經貿交流互動。我們已完成數個重要項目的研究工作，包括廣東省產業結構轉型及珠三角西部的发展，並於2006年11月舉行研討會，向政府及公眾介紹我們的建議。一直以來，我們致力協助香港企業了解內地一些將會影響其業務的發展。同時，我們亦讓內地企業認識香港可如何協助其開拓國際市場。



Introduction

Hong Kong/Guangdong cooperation is not new. Ties have been growing since China's economic reform started in 1978. Today, there are more than 90 000 Hong Kong enterprises in Guangdong. Cumulative actual direct investment in the Province from Hong Kong stands at US\$ 105.4 billion.

The Greater Pearl River Delta Business Council (the Business Council) was established in March 2004 to foster closer economic cooperation between Hong Kong and the Pearl River Delta (PRD) region. It is a private sector initiative and works alongside the Governments of the Hong Kong Special Administrative Region (HKSAR) and Guangdong Province.

In the past few years, the Business Council has been working with its counterparts in Guangdong to increase economic and trade interaction. We completed studies on several important projects including Guangdong's industrial restructuring and the development of the western PRD. We subsequently held a seminar in November 2006 to share our recommendations with government and the public. Throughout we have been helping Hong Kong enterprises understand developments in the Mainland that affect their business. In the same vein, we have created awareness among Mainland enterprises of the role that Hong Kong can play to help them grow internationally.

I am happy to see the Business Council entering its second term and am honoured to present to you this year's Annual Report. In it you will find highlights of our work and some of my own thoughts on the issues that we face.

我樂見商務委員會踏入第二屆任期，亦很榮幸能夠在此向大家介紹本年度之年報。年報載述我們在過去一年內的工作重點，而我也會對當前問題略抒己見。

香港與珠三角日趨融合對香港的影響

近三十年來，香港一直是協助珠三角轉型為區內主要製造中心的重要動力之一；故此，香港亦與珠三角日趨融合。

兩地融合推動珠三角的經濟更加向外擴展。珠三角已發展為包括香港和澳門特區在內的大珠江三角洲(大珠三角)，並成為中國增長最快及最富庶的地區之一。現在，大珠三角已進一步擴展成一個更大的合作區，即覆蓋九個省分及香港和澳門特區的泛珠三角區。

香港與珠三角至今仍不斷融合。由於兩地優勢互補，持續融合也是促進泛珠三角區域合作和發展的關鍵。香港繼續以國際金融、貿易及航運中心的地位，為地區提供金融、物流、旅遊及資訊科技等服務。與此同時，珠三角已成為全球首要生產和採購基地之一，不但匯聚了世界成功的產業群和服務群，亦有相當數量的中小企運作。彼此配合之下，珠三角具有很大的靈活性，可應付不斷轉變的市場狀況。

香港與珠三角之關係無疑已更趨緊密，但區內的未來發展亦難免會為香港帶來新挑戰。

限制與機遇

「四流」概念

香港經濟一向建基於流量：經港口及機場進出的流量、經股票市場及銀行業進出的流量、來自內地及世界各地的人才流量，以及造就香港成為管理協調中心的信息流量。這些流量正是香港經濟所依及持續繁榮的基石。

Increasing Integration with the PRD and Implications for Hong Kong

For almost three decades, Hong Kong has been one of the key driving forces behind the transformation of the PRD into a major regional manufacturing centre. As a result, Hong Kong and the PRD have become increasingly integrated.

This has been a catalyst for even greater expansion. We have witnessed the growth of the PRD into the Greater Pearl River Delta (GPRD), which includes Hong Kong and Macao SARs. The GPRD has become one of the

fastest growing and most affluent regions in China. Furthermore, we now see the emergence of an even wider cooperation, i.e. the Pan-PRD region embracing nine provinces and Hong Kong and Macao SARs.

Hong Kong is still in the process of integrating with the PRD. Because the strengths of these two regions are complementary, this on-going integration is also central to Pan-PRD regional cooperation and development. Hong Kong continues to be an international centre for financial services, trade, and shipping. It can provide financial, logistics, tourism and information technology services to the region. Meanwhile the PRD is already one of the world's leading manufacturing and sourcing bases. Its clusters of internationally successful industries and services as well as the healthy presence of small and medium enterprises, means that it has great flexibility in meeting changing market conditions.

The relationship between Hong Kong and the PRD has undoubtedly strengthened. Yet the region's future development will inevitably give rise to new challenges for Hong Kong.



Constraints and Opportunities

The Concept of Four Flows

Hong Kong's economy has always been built around flows: flows through our port and airport, flows through our stock market and banking sector, flows of talented people from the Mainland and the rest of the world, and information flows that have allowed Hong Kong to become a management and coordination centre. It is these flows that have built our economy and contributed to sustaining Hong Kong's prosperity.

長久以來，香港受惠於投放在港口和通訊系統等方面的基建投資，以確保香港具備足夠的吞吐能力以應付增長。若與區內大部分其他經濟體系相比，我們所受的限制較少；若與全球各地相比，我們與內地經濟蓬勃地區的連繫較密切；若與內地相比，我們與海外各國的連繫亦較為密切。

今天，我們須比以前更加留意我們的吞吐能力、限制和連繫；其原因有下列數個。

基本上，香港一如以往，只是一條供重要流量以不同方式流通的管道。我們雖然倚仗這些流量，卻非其源頭或最終目的地。

其他原因則與廣東的發展有關。香港的繁榮有賴上述提及的流量，而廣東的各項發展已改變了這些流量的本質。

流量本質不斷改變

對香港極為重要的流量，多以內地為源頭或目的地。經香港進出的貨物，絕大多數來自或運往內地。內地公司在香港上市籌資及持續融資，以及國際資金的流向，使香港成為全球主要的籌集股本資金中心和金融中心。大部分流入香港的人力資源，均與內地有關。此外，香港作為區內資訊協調管理中心，也促進了中港之間的資訊流通。

Historically, Hong Kong has benefited from investments in infrastructure such as our ports and telecommunications system to ensure sufficient capacity for growth. We have experienced fewer constraints than most other economies in the region. We have also been better connected to the economically vibrant portions of the Mainland than the rest of the world and better connected with the rest of the world than the Mainland.

Today, we need to be more concerned about capacity, constraints and connectivity than ever before. The reasons are several-fold.

Fundamentally Hong Kong remains only a conduit for the crucial content that flows through it in so many different ways. It is neither the source nor the destination of most of the flows that it relies upon.

Other reasons are related to developments in Guangdong that have changed the nature of the flows that Hong Kong relies on for its prosperity.

The Flow Dynamic is Changing

Most of the flows that are important to Hong Kong have their source or their destination in the Mainland. The vast majority of goods that flow through Hong Kong come from or go to the Mainland. Mainland company IPOs and other funds flows have made Hong Kong a leading centre for raising equity capital as well as a leading global financial centre. Most of our human resources inflows involve the Mainland. Hong Kong's role as a coordination and management centre underpins information flows between Hong Kong and the Mainland.

But things are changing. Hong Kong used to be better equipped than cities in the Mainland to interact with the rest of the world.



然而，世事瞬息萬變。以往，香港與世界各地的連繫，確比內地城市優勝，但隨着內地不少城市在港口、機場及通訊系統方面迅速發展，這個優勢日後將難以持續。雖然香港仍有其優勢，尤其在資金及資訊流量方面，但內地的運輸及通訊基建和清關系統的效率亦正不斷提升。

廣東省產業結構轉型

廣東省正大力推行產業結構轉型，首要發展重工業、高增值產業及服務業。

廣東省產業結構轉型將會對香港經濟產生深遠影響。假使香港的製造業及服務業不能適應廣東省產業結構轉型所帶來的新情況，長遠而言，香港的重要經濟支柱，例如港口貨運及商貿平台的功能，將會面對被邊緣化的危機。

出口加工貿易政策調整

最新出台的出口加工貿易政策調整，也會對現時在粵從事加工業的7萬多家廠商造成重大影響。為此，商務委員會已成立專責小組評估新政策對港資企業的影響，並會提出相應的政策建議。有關的研究摘要將在報告較後的篇章論述。

企業所得稅改革

中國政府全國人民代表大會在2007年3月發布新的《企業所得稅法》。新稅法將由2008年1月1日起實施，其主要目的之一是把外資企業和內地企業的所得稅率劃一定為25%，為兩類企業提供公平的競爭環境。大部分在粵的港資企業均屬外資企業，一直享有15%的較低稅率。在新稅法下，在五年過渡期後，港資企業將須繳付25%的稅率。調高稅率會對這些企業帶來額外的財政負擔。相反，由於新稅法同時適用於現正繳付33%稅率的內地公司，實施新劃一稅率將會加強這些公司的競爭力，而這將是港資公司須面對的另一挑戰。

Yet if we look at the rapid development of ports, airports and communications systems in many Mainland cities, we can see that that is not going to be the case in the future. Hong Kong still has an important advantage particularly in fund and information flows, but the Mainland is becoming increasingly efficient in transport and communications infrastructure and customs systems.

The Restructuring of Guangdong's Industries

Guangdong Province has embarked on a rigorous economic restructuring programme. Its priorities are heavy and high value-added industries and the service sector.

Guangdong's industrial restructuring will have a significant long-term impact on Hong Kong's economy. If Hong Kong's manufacturing and services industries fail to adapt to new business conditions resulting from Guangdong's restructuring, then key pillars of Hong Kong economy, such as its ports and trade platform risk being marginalised in the long run.

Changes in Export Processing Trade Policy

The latest announcement of a policy change on export processing trade will also have a huge impact on more than 70 000 factories that are currently in processing trade business in Guangdong. The Business Council has established a task group to assess the new policy's impact on Hong Kong-based enterprises and will make some policy recommendations accordingly. A summary of the study is featured in a later chapter.

Corporate Income Tax Reform

In March 2007, the National People's Congress of the Chinese Government announced a new Corporate Income Tax Law to come into effect on 1 January 2008. One of the main objectives of the Law is to standardise the income tax rates of foreign invested enterprises and domestic enterprises at 25% to provide a level playing field for both types of enterprises. Most Hong Kong-based enterprises operating in Guangdong are foreign invested enterprises and have been enjoying a lower tax rate of 15%. Under the new Law, the 25% tax rate will apply to them with a transition period of five years. The higher tax rate will impose an additional financial burden on them. Conversely, since the new Law also applies to domestic companies currently paying a tax rate of 33%, the new standard tax rate will increase these companies' competitiveness. This presents another challenge to Hong Kong-based companies.

在粵港資企業面對的其他挑戰

廣東省的營商成本不斷上漲。隨着整個地區致力應付急升的需求，港資企業亦要面對土地和勞工成本以至能源費用上升的問題。再者，人民幣升值亦導致經營成本增加。

另一方面，政府和社會亦明白加強保護環境的需要，因而推出新措施和標準，鼓勵採用環保生產方式及環保消費模式。我們支持這些環保措施，但很多企業在這方面既沒有認識，亦欠缺資金，因此較難採取行動以符合新的守則和規例。

香港應如何回應？

香港是享譽全球的國際金融、貿易和航運中心。香港要鞏固主要支柱產業的領導地位，以加強和維持長遠的競爭力，這對香港而言是十分重要的。為此，香港必須留意整個地區的變化，並採取相應措施以保持競爭力。

人才

香港的競爭力很大程度上取決於人才。若香港可以容許大量人才自由進出，將會提升我們的競爭力，吸引更多資金和創造更多就業機會。此外，除了提升本地教育水平外，我們必須吸引海外及內地人才來港，給予培育，從而增加香港的人才庫。不論在職場上還是在學校內，讓本地人才與海外人才共處，除了可以啟發思維外，更可以把香港塑造成為一個創意及創新中心，有助確保香港日後能維持其競爭力。為此，我們應鼓勵業界、學界及政府攜手合作，致力吸引和培育國際人才。

連繫

香港要保持長遠的競爭力，亦有賴與合適地點保持足夠的連繫。我們須確保本港能連接上文提及的重要流量的源頭和目的地。換言之，我們須進行基礎建設，把本港與珠三角城市、內地其他地方以至全世界連接起來。

Other challenges faced by Hong Kong-based enterprises in Guangdong

Doing business in Guangdong is getting more expensive. Hong Kong enterprises are finding themselves saddled with escalating land and labour costs and higher energy bills as the region endeavours to meet soaring demand. An appreciating RMB is another factor in increasing operating costs.

On another front, the government and community have perceived the need for greater environmental protection. New measures and standards promoting green manufacturing and green consumption have been introduced. While we support these environmental initiatives, most enterprises find coping with the new rules and regulations difficult as they lack both knowledge of the subject and capital to implement required changes.

How should Hong Kong react?

Hong Kong is well known for its status as an international centre for financial services, trade and shipping. It is of paramount importance that Hong Kong consolidates its leading position in key pillar industries to strengthen and sustain its long-term competitiveness. To do so, it must be alert to changes taking place in the entire region and must take measures to sustain its competitiveness.

People

Ultimately, Hong Kong's competitiveness rests very much on its people. A large pool of talent that can flow freely through Hong Kong will increase Hong Kong's competitiveness, attract more capital and create more jobs. Apart from elevating local education standards, Hong Kong must enlarge its talent pool by attracting and nurturing talent from overseas and the Mainland. In both work and study fields, the mixing of local and overseas talent not only generates intellectual stimulation but also brands Hong Kong as a nucleus for creativity and innovation. It will help to assure Hong Kong's future ability to remain competitive. As such, collaboration involving industry, academia and the government to attract and nurture international talent should be encouraged.

Connectivity

Our long-term competitiveness also depends on having sufficient connectivity to the right locations. We need to ensure that we are plugged into the sources and destinations of the critical flows that I mentioned before. This means building infrastructure linking us to cities in the PRD, to the rest of the Mainland and to the world.

現時，由香港前往珠三角的人士大多前往東部地區。我欣見落馬洲支線及深港西部通道將於本年內投入服務。連接兩地的新鐵路及道路將有助應付跨境交通日趨頻繁的需求。不過，我們仍須加快興建港珠澳大橋的步伐。我們也須進一步把本港和內地的公路及鐵路系統連接起來。

隨着綜合運輸系統的落成，日後由香港經陸路可於三小時內到達珠三角地區，形成一個「三小時經濟區」。就本港而言，本地公司要到珠三角投資；採購貿易公司要到區內搜尋貨源；服務業機構要到區內提供服務；抑或公司要進行相關管理工作，都可以借助這個經濟區獲得極大方便。

在連繫方面，我們的願景並不止於興建設施以連接珠三角地區或廣東省，而是把目光擴展至幅員更廣的內陸及泛珠三角地區。通過基建、清除貿易障礙和吸引外資、技術、管理人才及其他人才，我們便可鞏固泛珠三角作為二十一世紀中國及世界最具活力的經濟中心之一的地位。

CEPA

我們應探討如何善用CEPA的機遇。很多人都會認同，CEPA可加強中港合作，帶來新的商機，促進中港長遠發展，是一項雙贏的貿易協議。

內地開放市場為香港帶來更多商機。同時，香港的資金和人才北上，亦為內地企業注入一流水平的專業知識，並為他們開拓國際視野。要更全面了解CEPA，香港應建立一個諮詢平台，讓各大商會在促進貿易投資措施方面交流經驗，以及分享落實CEPA時所遇到的問題。與此同時，香港亦應進行更多研究，探討CEPA所帶來的利益，以促進CEPA的推廣工作。此外，因應國際多邊貿易談判及全球貿易新趨勢，內地在貿易和投資方面亦作出開放，香港應致力探討如何掌握這方面的新機遇。

At the moment, visitors from Hong Kong to the PRD mainly go to the east of the region. I am delighted that the Lok Ma Chau Spur Line and the Hong Kong-Shenzhen Western Corridor will start operation this year. The new train and road links will help meet the increasing demand of cross-boundary traffic. But we still need to push ahead with the construction of the Hong Kong-Zhuhai-Macao Bridge. We also need to further connect our road systems and our rail systems to those of the Mainland.

An integrated transportation system will open up the "Magic Three Hour Zone", the area in the PRD that can be reached from Hong Kong by land in three hours. This is the Zone in which it is easiest for Hong Kong companies to invest, for Hong Kong sourcing and trading offices to access, for Hong Kong service providers to serve, and for Hong Kong firms and offices to manage.

Our vision of connectivity goes beyond building links to the PRD or Guangdong and extends to a much larger hinterland: the Pan-PRD. Removing obstacles to trade, attracting foreign capital, technology, management and talent will reinforce the status of this region as one of the most dynamic economic centres of China and of the world in the 21st century.

CEPA

We need to look at optimising CEPA. Most would agree that CEPA is a win-win trade agreement that deepens cooperation, brings about new business opportunities and enables the long-term development of the Mainland and Hong Kong.

The opening of the Mainland market means more business opportunities for Hong Kong while investment and talent from Hong Kong to the Mainland bring first-class professional expertise and an international outlook to the Mainland enterprises. In order to have a fuller appreciation of the agreement, a consultative platform should be established to allow major business associations to share experiences on trade and investment facilitation measures and problems encountered relating to CEPA implementation. Meanwhile, more research on the benefits of CEPA should be conducted to facilitate CEPA promotional work, and ways should be explored to capture new opportunities in the light of the Mainland's trade and investment liberalisation arising from multilateral trade negotiations and new trends in world trade.

Air Quality

Deterioration to address environmental problems is a universal phenomenon. Hong Kong is no exception. The deterioration of air quality in the region threatens not only people's health and quality of life, but also the region's attractiveness to international business and tourists. I am

空氣質素

全球均決心正視環境問題，香港也不能置身事外。區內空氣質素惡化不僅影響人們的健康和生活質素，亦有損這個地區對國際商界和遊客的吸引力。我喜見香港和內地政府，以及商界一直致力解決這項問題；然而，我們需要採取更多措施以解決這迫切的問題。香港必須加強與廣東溝通，讓政府、商界和市民三方一起合作，並且牽頭落實措施，起示範作用。

總結

我們明白中港合作對兩地增長和發展是十分重要。誠然，要維持長遠的伙伴關係殊非易事，而這實有賴兩地長遠的規劃和協作。商務委員會將致力尋求短期和長期措施，以處理兩地共同關注的課題。屆時，有關措施將需要中港當局及商界鼎力支持。

鳴謝

在此，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，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。

馮國經

大珠三角商務委員會主席
馮國經
二零零七年六月



delighted to see that the Hong Kong and the Mainland governments as well as the business community have been working to solve this problem. Yet, more measures are needed to address this pressing issue. Hong Kong must strengthen its communication with Guangdong, build up a tripartite cooperation among government, business sector and the general public, and take the lead in implementing exemplary measures.

Conclusion

We recognise the importance of cooperation between Hong Kong and the Mainland to our mutual growth and development. Long-term partnership is no easy task. Long-term planning and coordination are pivotal in our relationship. At the Business Council, we are engaged in seeking both short and long-term initiatives addressing issues of mutual interest. These initiatives will require the support of the authorities and business communities in Hong Kong and the Mainland.

Acknowledgements

On behalf of the Business Council, I wish to extend my gratitude to each of our Members and Staff Officers for their commitment and dedication, their sound advice, and their generosity in sharing with us their invaluable experience. I would also like to thank the Secretariat for its hard work 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 for supporting the work of the Business Council and fostering cooperation between Hong Kong and Guangdong Province.

Victor Fung

Dr Victor Fung
Chairman
The Greater Pearl River Delta Business Council
June 2007

職權範圍及架構

Terms of Reference and Structure

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

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 channelling 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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2006-2008

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珠三角最新發展情況

An Overview of Recent Development in the Pearl River Delta



珠三角最新發展情況

An Overview of Recent Development in the Pearl River Delta

背景

珠三角位於廣東省，一直被視為推動中國在當今世界崛起的地區重鎮。珠三角包括九個市，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

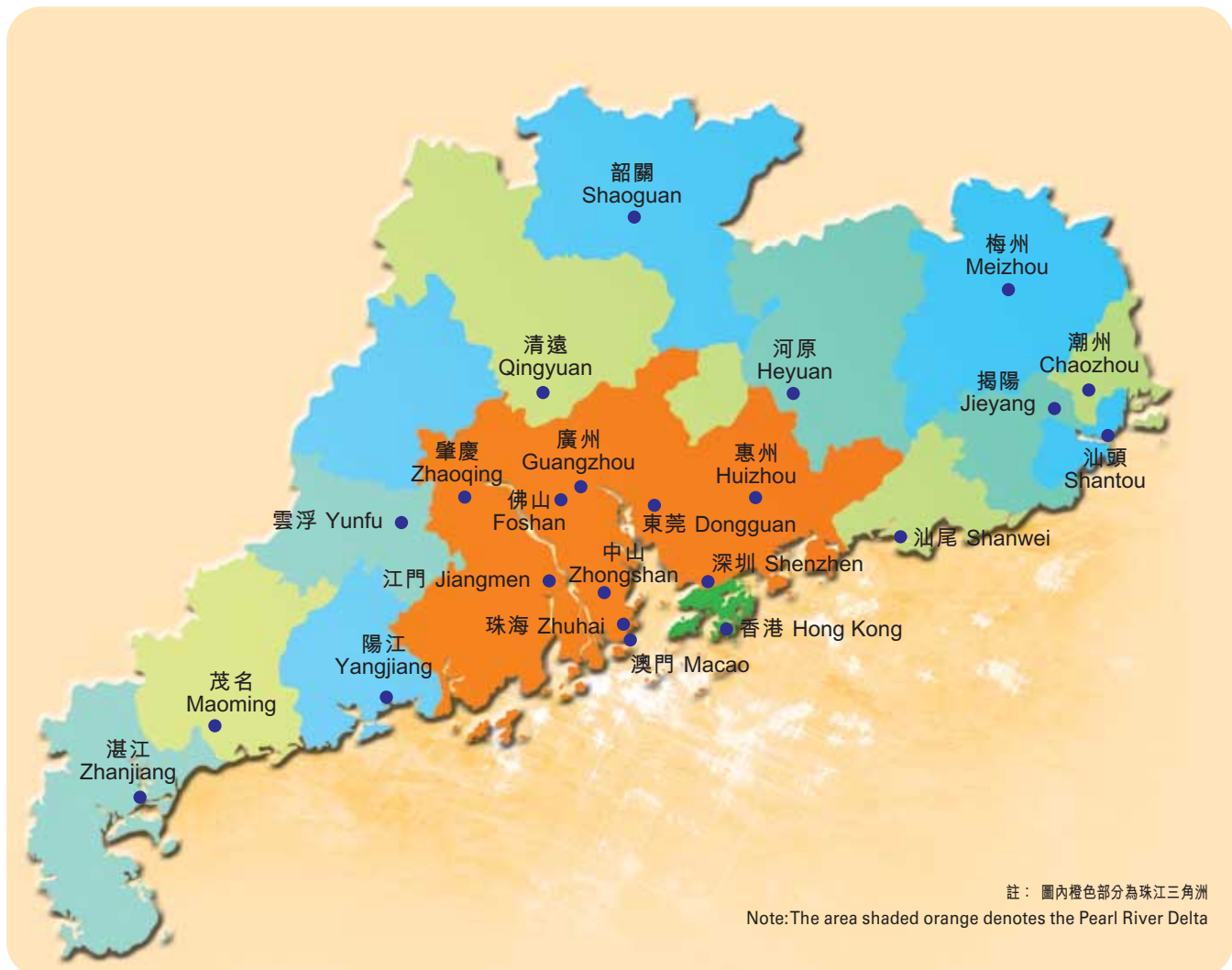
廣東省及珠江三角洲經濟區

General Background

The PRD, situated in the Guangdong province, has long been recognised as the regional powerhouse of China for its rise in the contemporary world. The region comprises 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



大珠江三角洲的主要管轄區

Main jurisdictions in the Greater Pearl River Delta Region



珠三角地區的經濟持續迅速發展。2005年的生產總值達18,059億元人民幣(2,206億美元)，按年增長15.8%。珠三角的主要經濟指標見圖表1及2。

The PRD region continues to experience robust economic development. The GDP in 2005 amounted to RMB 1,805.9 billion (US\$220.6 billion), with a year-on-year increase of 15.8%. 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 Pearl River Delta Region (at current prices)

指標 Indicator	1980	1985	1990	1995	2000	2001	2002	2003	2004	2005
戶籍人口(百萬人) ⁽¹⁾ Registered population (million persons) ⁽¹⁾	16.27	17.57	19.28	21.38	23.07	23.37	23.65	23.99	24.51	24.99
生產總值(億元人民幣) ⁽²⁾ Gross domestic product (0.1 billion yuan) ⁽²⁾	119.2	303.9	872.2	3,899.7	7,378.6	8,363.9	9,418.8	11,341.1	15,337.3	18,059.4
第一產業(億元人民幣) Primary industry (0.1 billion yuan)	30.7	57.3	129.4	314.9	428.5	445.2	465.0	470.5	489.4	498.8
第二產業(億元人民幣) Secondary industry (0.1 billion yuan)	54.0	148.7	404.6	1,957.1	3,657.3	4,139.0	4,688.1	5,939.6	7,629.8	9,196.0
第三產業(億元人民幣) Tertiary industry (0.1 billion yuan)	34.5	97.9	338.2	1,627.7	3,292.9	3,779.8	4,265.6	4,930.0	7,218.1	8,364.5
固定資產投資總額(億元人民幣) Total amount of investment in fixed assets (0.1 billion 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	5,296.8
消費品零售總額(億元人民幣) Total amount of retail sales of consumer goods (0.1 billion 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	5,630.5
出口總額(億美元) Total amount of exports (US\$ 0.1 billion)	6.2	16.3	81.4	461.1	847.4	908.3	1,126.1	1,450.6	1,818.5	2,271.2
外來直接投資額(億美元) Foreign direct investment (US\$ 0.1 billion) ⁽³⁾	1.0	7.4	15.4	85.8	125.4	141.9	150.2	170.3	110.7	115.1
地方財政收入(億元人民幣) Local government revenue (0.1 billion yuan)	23.4	49.9	95.9	315.3	595.6	745.7	768.7	848.0	932.0	1,211.5
地方財政支出(億元人民幣) Local government expenditure (0.1 billion yuan)	8.2	26.1	76.4	316.6	682.1	822.7	963.6	1,075.0	1,210.0	1,547.3
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 (0.1 billion 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	15,154.9

- 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則仍稱為「國內生產總值」。本圖表內的2004年生產總值數據，已按2004年全國經濟普查的統計範圍作出調整。
- (3) 2004年實際利用外來直接投資的數據曾作調整，因此不可與2003年或以前的有關數據相比。圖表內的2003年或以前的數據是指“實際利用外資總額”。

- 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”. Data of 2004 on GDP in this table have been adjusted in accordance with the statistical coverage of the 2004 National Economic Census.
- (3) The foreign direct investment actually used of 2004 was adjusted, which was not comparable with that of 2003 and prior to it. Figures of 2003 and prior to it in the table refer to "foreign capital actually used".

資料來源：廣東省統計局和2002至2006年的《廣東統計年鑑》。

Sources: Guangdong Provincial Statistics Bureau, Guangdong Statistical Yearbook 2002 to 2006.

圖表2 2005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 2005

主要城市 Major City	生產總值 (百萬元人民幣) (按可比價格計算的逐年增長率) GDP (million yuan) (yoy growth at comparable prices)	人均生產總值 (人民幣) (按可比價格計算的逐年增長率) Per capita GDP (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	515,423 (12.9%)	53,809 (14.3%)	189,874 (13.2%)
深圳 Shenzhen	495,091 (15.1%)	60,801 (11.6%)	143,767 (15.0%)
珠海 Zhuhai	63,495 (13.4%)	45,284 (10.7%)	22,014 (16.3%)
佛山 Foshan	238,318 (19.4%)	41,266 (17.8%)	64,773 (16.6%)
江門 Jiangmen	80,537 (12.8%)	19,636 (12.3%)	30,982 (12.3%)
東莞 Dongguan	218,162 (19.4%)	33,263 (19.4%)	50,001 (17.2%)
中山 Zhongshan	88,020 (23.2%)	36,207 (22.8%)	27,660 (17.9%)
惠州 Huizhou	80,343 (15.8%)	21,896 (12.9%)	25,151 (18.0%)
肇慶 Zhaoqing	45,057 (14.4%)	12,315 (12.7%)	14,229 (17.7%)

資料來源：《廣東統計年鑑—2006》。

Sources: Guangdong Statistical Yearbook 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2005年卻佔國內生產總值的9.8%、總出口的29.8%及外來直接投資的19.1%。這地區亦是廣東省的經濟樞紐：雖佔全省土地面積的23.2%，但在2005年卻佔該省生產總值的80.7%、總出口的95.4%及外來直接投資的93.1%。(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, 29.8% of total exports and 19.1% of foreign direct investment in 2005. This region is also an economic hub of Guangdong province: it accounted for 23.2% of the province's land mass but contributed 80.7% of its GDP, 95.4% of total exports and 93.1% of foreign direct investment in 2005. (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

	2005 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	31.6%	未能提供 Not available
普查人口(第五次全國人口普查) Census population (Fifth National Population Census)	47.8%	3.2%
生產總值 GDP	80.7%	9.8%
出口 Exports	95.4%	29.8%
外來直接投資 Foreign direct investment	93.1%	19.1%

資料來源：《中國統計年鑑－2006》、《廣東統計年鑑－2006》。

Sources: China Statistical Yearbook 2006, Guangdong Statistical Yearbook 2006.

根據一份最近公布的中國城市競爭力報告¹，所有珠三角城市在2006年均位列全國首200個最具競爭力城市之內，其中三分二排名首50位，當中更有三個城市躋身首十位：深圳(第二位)、廣州(第五位)及佛山(第九位)。圖表4顯示2005年珠三角部分城市的主要經濟指標。

According to a recently released report on urban competitiveness¹, all the PRD cities were ranked within the top 200 competitive cities in China in 2006, with two-thirds ranked within the top 50, and three of the cities were even on the top ten list: Shenzhen (No. 2), Guangzhou (No. 5) and Foshan (No. 9). Exhibit 4 shows the major economic indicators of selected cities in PRD in 2005.

註：(1) 《中國城市競爭力報告》，倪鵬飛主編，社會科學文獻出版社(中國)，2007年。

Notes : (1) "Annual Report on Urban Competitiveness", N. Pengfei, Social Sciences Academic Press (China), 2007.

圖表4 2006年珠三角個別城市的經濟指標

Exhibit 4 Economic indicators of individual Pearl River Delta cities, 2006

主要城市 Major City	生產總值 ⁽¹⁾ (億元人民幣) GDP ⁽¹⁾ (0.1 billion yuan)	生產總值的組合成分 ⁽¹⁾ Composition of GDP ⁽¹⁾		
		第一產業 Primary industry %	第二產業 Secondary industry %	第三產業 Tertiary industry %
廣州 Guangzhou	6,068.4	2.4	39.9	57.7
深圳 Shenzhen	5,684.4	0.1	53.2	46.7
珠海 Zhuhai	749.6	2.7	55.4	41.9
佛山 Foshan	2,915.0	2.7	62.8	34.6
江門 Jiangmen	921.0	8.3	53.3	38.4
東莞 Dongguan	2,624.6	0.7	58.0	41.3
中山 Zhongshan	1,036.0	3.1	61.6	35.3
惠州 Huizhou	933.2	8.5	58.5	33.0
肇慶 Zhaoqing	526.2	28.1	28.8	43.1

註： (1) 初步帳目數據。

(2) 特定規模以上工業企業的數字(年銷售收入達人民幣500萬元以上的所有國有工業企業和非國有工業企業)。

Notes: (1) Preliminary data on the accounts.

(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).

資料來源：有關城市的統計公報和《廣東統計概要 - 2007》。

Sources: Statistical communiqués of relevant cities, 《廣東統計概要 - 2007》.

工業總產值 ⁽²⁾ (億元人民幣) Gross industrial output value ⁽²⁾ (0.1 billion yuan)	進出口總額 (億美元) Imports and Exports (0.1 billion US\$)	外來直接投資額 (百萬美元) Foreign direct investment (million US\$)	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 ⁽¹⁾ (人民幣) Per capita GDP ⁽¹⁾ (yuan)	消費品零售總額 (億元人民幣) Total retail sales of consumer goods (0.1 billion yuan)
7,272.5	637.7	2,923	19,851	暫時沒有數字 Not yet available	2,182.8
11,673.4	2,374.1	3,268	22,567	67,907	1,671.3
1,951.4	328.2	824	17,671	52,317	255.5
6,236.8	309.8	1,137	暫時沒有數字 Not yet available	暫時沒有數字 Not yet available	776.2
1,759.1	108.2	678	13,869	22,400	352.3
4,822.6	842.2	1,808	25,320	暫時沒有數字 Not yet available	584.5
2,724.5	231.3	713	18,897	42,047	331.1
1,793.1	212.3	1,045	15,991	24,996	297.2
452.6	27.9	672	11,547	暫時沒有數字 Not yet available	167.9



產業結構轉型

二十多年前，廣東省的經濟開始起步。廣東省當時的廉價土地及工資，以及政府為吸引外資而提供的種種政策優惠，吸引了大批香港及海外投資者前往當地設廠，成為經濟發展的主要動力。多年來，勞工密集的輕工業在推動廣東省的產業發展上發揮舉足輕重的作用，但時移世易，這種情況正出現多種轉變。

近年，廣東省的產業結構正逐步轉型，並朝着重工業和高增值產業方向發展。作為廣東省的經濟樞紐，珠三角地區的輕工業與重工業比例，已由1978年的56.6:43.4變為2005年的40.45:59.55。珠三角2005年的產業增值達8,147億元人民幣(995億美元)，佔全省的86.5%。廣東九大支柱產業中有三類(電子信息業、電器用品及機械工業和石油化工業)一直發展蓬勃，佔九大產業總生產值的70.8%。

與此同時，珠三角的經濟結構亦出現重大轉變：以地區生產總值計算，該區三類產業的比例由1978年的25.8:45.3:28.9發展為2005年的2.8:50.9:46.3，第三產業所佔的比例增加了60.2%。

根據國務院於2007年3月公布的《國務院關於加快發展服務業的若干意見》，中國將會加快發展服務業，以期加速產業結構轉型的步伐。國務院期望重整外貿增長結構，由現時以低增值製成品出口為主的局面，轉變為更加倚重服務業。推動服務業發展是為了把經濟增長模式，由工業主導轉為更加着重國內消費，藉以減輕對環境及出口造成的壓力。

Industrial Restructuring

The economy of Guangdong province began to take shape more than two decades ago, largely fuelled by a host of manufacturing operations set up by Hong Kong and overseas investors to exploit the cheap land and labour as well as other favourable conditions created by the government policy to attract foreign investments. For years, the labour-intensive light industries have played a key role in powering the industrial development of the province. However, changes are taking place.

The industrial structure in Guangdong has gradually been transforming in recent years. The province has geared its industrial structure towards heavy and high value added industries. As the economic hub of Guangdong province, the PRD region's proportion of light industries to heavy industries of the PRD region changed from 56.6:43.4 in 1978 to 40.45:59.55 in 2005. The value added of industry in PRD reached RMB 814.7 billion (US\$99.5 billion) in 2005, accounting for 86.5% of the whole province. The development of three of the nine pillar industries in Guangdong, namely electronic information, electrical appliances & machinery and petrochemicals, has been robust, representing 70.8% of the total production of the nine industries.

Meanwhile, the composition of economy of PRD has also experienced great changes: the ratio of the three sectors in GDP changed from 25.8:45.3:28.9 in 1978 to 2.8:50.9:46.3 in 2005, with the proportion of the tertiary industry increased by 60.2%.

According to the "Opinions of the State Council concerning Accelerating the Development of the Services Sector" released by the State Council in March 2007, China will speed up the development of its services sector so as to accelerate the pace of its economic restructuring. The State Council wishes to see foreign trade growth, now dominated by exports of low value added manufactured goods, be reconfigured by a larger reliance on the services trade. The idea behind the push of the services sector is to shift the economy's style of growth from being industry-driven to relying more on domestic consumption, thus alleviating the burden on the environment and exports.

此外，根據廣東省「十一五」規劃，廣東省將在2006至2010年期間加快發展服務業。

加工貿易政策的最新轉變

在2006年下半年至2007年年初，中國宣布對加工貿易政策作出調整，以示其引導加工貿易轉型升級的決心。新規定²取消和降低某些商品的出口退稅，以限制高污染、高耗能，以及耗用大量資源商品的出口。另一方面，高新科技商品的出口退稅則獲得上調，藉以鼓勵這類商品的出口，從而讓加工貿易加快轉型升級。此外，當局也頒布了經擴大的加工貿易禁止類商品目錄。

與禁止類商品有關的最新規管適用於所有企業，包括遵辦紀錄良好而出口貨量可觀的「A類」企業。至於限制類的商品，除「A類」企業外，其他企業一律須向海關「實際繳付」銀行保證金。此舉嚴重影響大部分相關企業的現金周轉。此外，這次擴大禁止類商品目錄所涉範圍甚廣，對經營鞋履、玩具、化工、食品、造紙、包裝、皮革、金屬以至電池等行業的港資企業，造成重大影響(詳情請參閱本年報第58頁的研究報告)。

Moreover, as stipulated in Guangdong's 11th Five Year Plan, the province will expedite the development of its service sector during 2006-2010.

Latest Policy Changes on Processing Trade

In the latter half of 2006 and early 2007, China announced changes on processing trade policy to show its determination to upgrade the processing trade. The new rules² stipulate the removal of and reduction in export tax rebate for certain products to restrict export of high pollution, high energy consumption and resource consumption products. There were also upward adjustments made to export tax rebates for new and hi-tech products in order to encourage the export of these products, thus expediting the upgrade of processing trade. An expanded list of prohibited category under processing trade was also introduced.

The latest regulations on products under the prohibited category apply to all enterprises, including 'Category A' enterprises with good compliance track record and considerable export volume. And for goods under the restricted category, "actual payment" of customs duty deposit is required unless the enterprise is a 'Category A' enterprise. This seriously affects the cash flow of most enterprises concerned. Moreover, the expansion of the prohibited category this time covers a wide scope, exerting huge impact on Hong Kong based enterprises ranging from shoes, toys, chemicals, food, papermaking, packaging, leather, metals and batteries. (For more details, please refer to study report on p.58 of this Report.)



註：(2) 國家財政部及其他部門發出的公告[2006]139及145號、商務部及其他部門發出的公告[2006]82號及[2007]17號。

Notes : (2) Circulars No. 139 and No.145 [2006] issued by Ministry of Finance and other ministries, Circular No.82 in 2006 and Circular No. 17 in 2007 issued by Ministry of Commerce and other ministries.

產業轉移

珠三角正在出現新一輪的產業轉移。這是廣東省政府為加快加工貿易轉型升級而推行的措施之一。自2006年起，當局已批准設立18個產業轉移園區³，範圍覆蓋珠三角區域與廣東省山區和東西兩翼的地區。這些地區的天然資源比較豐富，營運成本相對較低，適合設立勞動密集型的產業。此外，地方當局亦在土地用途、電力供應、基礎建設等方面提供支援，協助企業轉移。

加快跨界建設工程

香港和廣東政府明白兩地緊密融合對提升雙方競爭力至為重要，因此一直合作無間，致力改善跨界建設。以下是部分新近發展的主要跨界建設項目：

註：(3) 18個產業轉移園區包括：東莞石龍(始興)、中山火炬(陽西)、中山石岐(陽江)、佛山禪城(雲城都楊)、佛山順德(雲浮新興新成)、廣州白雲江高(電白)、東莞石碣(興寧)、東莞東坑(樂昌)、佛山禪城(陽東萬象)、中山(河源)、東莞大朗(信宜)、中山三角(滘江)、深圳鹽田(梅州)、東莞鳳崗(惠東)、順德龍江(德慶)、中山大涌(懷集)、東莞橋頭(龍門金山)及佛山順德(廉江)。

Industry Relocation

A new wave of industry relocation is in progress in PRD as this is part of the series of measures by which the Guangdong Provincial Government expedites the upgrade of processing trade activities. A total of 18 industry relocation parks³ had been approved covering the PRD, the mountainous regions and eastern and western parts of Guangdong since 2006. These areas have relatively richer natural resources and lower operating costs, which are suitable for labour-intensive industries to settle in. The local authorities also offer support in land use, electricity supply, infrastructure facilities and so on to help enterprises with the relocation.

Accelerating Construction of Cross-Boundary Infrastructure

Both Hong Kong and Guangdong governments have been working closely with each other to improve the cross-boundary infrastructure for they see the vital importance of a seamless integration of the two territories to the competitiveness of both places. The following are some highlights of recent developments of cross-boundary infrastructure:

Notes : (3) These 18 industry relocation parks are: Dongguan Shilong (Shixing) 東莞石龍 (始興)、Zhongshan Torch (Yangxi) 中山火炬 (陽西)、Zhongshan Shiqi (Yangjiang) 中山石岐 (陽江)、Foshan Chancheng (Yuncheng Duyang) 佛山禪城 (雲城都楊)、Foshan Shunde (Yunfu Xinxing Xincheng) 佛山順德 (雲浮新興新成)、Guangzhou Baiyun Jianggao (Dianbai) 廣州白雲江高 (電白)、Dongguan Shijie (Xingning) 東莞石碣 (興寧)、Dongguan Dongkeng (Lechang) 東莞東坑 (樂昌)、Foshan Chancheng (Yangdong Wanxiang) 佛山禪城 (陽東萬象)、Zhongshan (Heyuan) 中山 (河源)、Dongguan Dalang (Xinyi) 東莞大朗 (信宜)、Zhongshan Sanjiao (Zhenjiang) 中山三角 (滘江)、Shenzhen Yantian (Meizhou) 深圳鹽田 (梅州)、Dongguan Fenggang (Huidong) 東莞鳳崗 (惠東)、Shunde Longjiang (Deqing) 順德龍江 (德慶)、Zhongshan Dachong (Huaji) 中山大涌 (懷集)、Dongguan Qiaotou (Longmen Jinshan) 東莞橋頭 (龍門金山)、Foshan Shunde (Lianjiang) 佛山順德 (廉江)。

深港西部通道

2003年8月，香港特區政府展開深港西部通道工程，興建第四條中港跨境行車通道。深港西部通道的走線始於設有口岸過境設施的蛇口東角頭新填海區，橫跨前海灣而以新界西北區的鰲磡石為落點。深圳蛇口的新出入境管制站日後將會實施一地兩檢的客貨通關安排。深港西部通道已於2007年7月通車。

上水至落馬洲支線

上水至落馬洲支線全長7.4公里，用以紓緩羅湖過境旅客擠塞，以及配合過境鐵路乘客量的預期增長。該建築項目包括東鐵落馬洲支線、落馬洲支線管制站、公共交通交匯處及行人天橋，工程已竣工。預期支線可於2007年啟用。屆時，這條邊界通道每日最多可處理的旅客量約為15萬人次。

港珠澳大橋

2003年1月，國家發展和改革委員會與香港特區政府共同委託綜合運輸研究所進行一項「香港與珠江西岸交通聯繫研究」。研究認為港珠澳大橋將會有助縮短香港與珠江西岸之間的行車時間和距離；推動珠江西岸的社會經濟發展；鞏固香港的國際船運和航空中心地位；促進區內旅遊業的發展以及完善區內的交通網絡。2003年8月，港珠澳大橋前期工作協調小組成立，負責開展有關建設港珠澳大橋的前期工作。協調小組已就大橋的定線和着陸點達成協議，並已委

The Hong Kong-Shenzhen Western Corridor (HK-SWC)

The HKSAR Government commenced the construction of the HK-SWC in August 2003 with an aim of providing a fourth vehicular boundary crossing between Hong Kong and the Mainland. The alignment of the HK-SWC starts at the newly reclaimed area for the boundary crossing facilities at Dongjiaotou, Shekou. It spans across Deep Bay and land at Ngau Hom Shek in the Northwest New Territories. Co-location arrangement for both passenger and cargo clearance will be implemented at the new control point at Shekou in Shenzhen. The HK-SWC came into operation in July 2007.

The Sheung Shui to Lok Ma Chau Spur Line (Spur Line)

The 7.4km long Sheung Shui to Lok Ma Chau (LMC) Spur Line aims at relieving the congestion of cross boundary passengers at Lo Wu and coping with the anticipated growth in cross-boundary rail passenger traffic. The construction project, including the East Rail LMC Spur Line, LMC Spur Line Control Point, LMC Public Transport Interchange and the Passenger Bridge, has been completed. The Spur Line is expected to be commissioned in 2007. By that time, the boundary crossing will be able to handle up to about 150,000 passengers a day.

Hong Kong-Zhuhai-Macao Bridge (HZMB)

In January 2003, the National Development and Reform Commission and the Government of the Hong Kong Special Administrative Region commissioned the Institute of Comprehensive Transportation to conduct a study on "Transport Linkage between Hong Kong and Pearl River West". The study concluded that the HZMB will be instrumental in shortening the travelling time and distance between Hong Kong and the Pearl River West, promoting the socio-economic development of the Pearl River West, reinforcing Hong Kong's status as a international shipping and aviation centre, promoting the development of regional tourism industries and perfecting the regional transport network. In August 2003, the HZMB Advance Work Co-ordination Group (AWCG) was set up to press ahead with the advance work for the construction of the bridge. The AWCG has already reached agreement on the alignment and landing points of the bridge. It has also commissioned the China Highway Planning and Design Institute to conduct studies on the two outstanding issues, namely, the locations of boundary crossing facilities and the financing arrangements of the project, with a view to finalising the feasibility study report for submission to the Central People's Government as soon as possible. In January 2007, the Central People's Government set up the HZMB Task Force to help expedite the project.

託中交公路規劃設計院就過境設施選址及大橋項目融資安排這兩項有待定案的問題進行研究，以期盡快敲定可行性研究報告，提交中央政府審批。2007年1月，中央政府成立港珠澳大橋專責小組，協助加速推動大橋項目的進展。

北環線

北環線將由現時西鐵錦上路站伸延至落馬洲站，為新界西部提供直接通往邊界的鐵路服務。此外，北環線將在洲頭附近設置轉車站，以便乘客轉乘落馬洲支線經上水前往東鐵沿途各站。當九龍南線與北環線相繼落成後，東鐵和西鐵便連成一個完整的環形鐵路網絡，方便新界東西流向，同時可為新界西的居民提供更便捷的跨界鐵路服務，以便轉乘深圳地鐵。

廣深港高速鐵路

廣深港高速鐵路將會經深圳龍華站連接香港與廣州石壁新客站，組成國家快速鐵路網絡的一部分。經該城際鐵路通道，往來廣州與香港的行車時間可由現時的約一百分鐘縮短至一小時以內。有關鐵路的香港段將由建議的西九龍總站伸延至落馬洲邊界，與內地段連接。廣州石壁至深圳龍華段建設工程已於去年12月正式開展；香港段方面，九廣鐵路公司正積極進行研究，預計於本年7月向政府提交建議書。該項目的建設將配合國家「十一五」規劃加快發展鐵路運輸，可加強與珠三角及東部城市的聯繫。

The Northern Link

The Northern Link (NOL) will run between the existing West Rail at Kam Sheung Road Station and LMC Station and provide direct rail services between the western New Territories and the border. Moreover, an interchange station will be built near Chau Tau to allow NOL passengers to change to LMC Spur Line for all East Rail stations via Sheung Shui. The completion of the Kowloon Southern Link and the NOL will form a continuous railway loop connecting the East Rail and West Rail, which will not only facilitate travelling between eastern and western New Territories but also provide residents of western New Territories with more convenient cross-boundary rail services for easy transit to the Shenzhen Metro.

Guangzhou-Shenzhen-Hong Kong Express Rail Link

The Guangzhou-Shenzhen-Hong Kong Express Rail Link (ERL), linking Hong Kong to the Shibi Station in Guangzhou via the Longhua Station in Shenzhen, will form part of the national high-speed rail network. With this new inter-city rail corridor in place, the journey time between Guangzhou and Hong Kong will be reduced from the current 100 minutes or so to within an hour. The Hong Kong section of the ERL will run from a proposed terminal at West Kowloon to the boundary at Lok Ma Chau for connection with the Mainland section of ERL. The works on the section between Shibi and Longhua have commenced since December last year. As for the Hong Kong section, the Kowloon-Canton Railway Corporation is working on relevant studies actively and it is expected that a proposal will be submitted to the Government in July this year. In line with the aim to speed up railway development as set out in the National 11th Five Year Plan, the ERL will strengthen Hong Kong's connection with the PRD and cities in the eastern region.



深港合作

為促進CEPA的落實，以及加快實施粵港合作聯席會議第六次會議就深港合作議定的具體措施，深港當局於2004年6月簽署《加強深港合作的備忘錄》。備忘錄列明深港同意加強合作，推動兩地的長期共同繁榮。雙方同時簽署八份合作協議書，以加強不同領域的合作。

深港合作關係自此越見緊密，合作範疇由貿易與基建擴展至旅遊、金融及環保等領域。行政長官在2005年10月發表的施政報告中提及，香港會加強與深圳在不同領域的交流和合作，包括發展邊境管制站、基建規劃、改善食物安全及生態。在國家「十一五」規劃框架下，深圳「十一五」規劃訂明重點加強與香港在跨界建設、環保及資訊科技等多方面的合作。2006年年中，深圳當局亦在《深圳2030城市發展策略》文件中，重申其目標是加強與香港合作，把深圳建設為世界級城市。

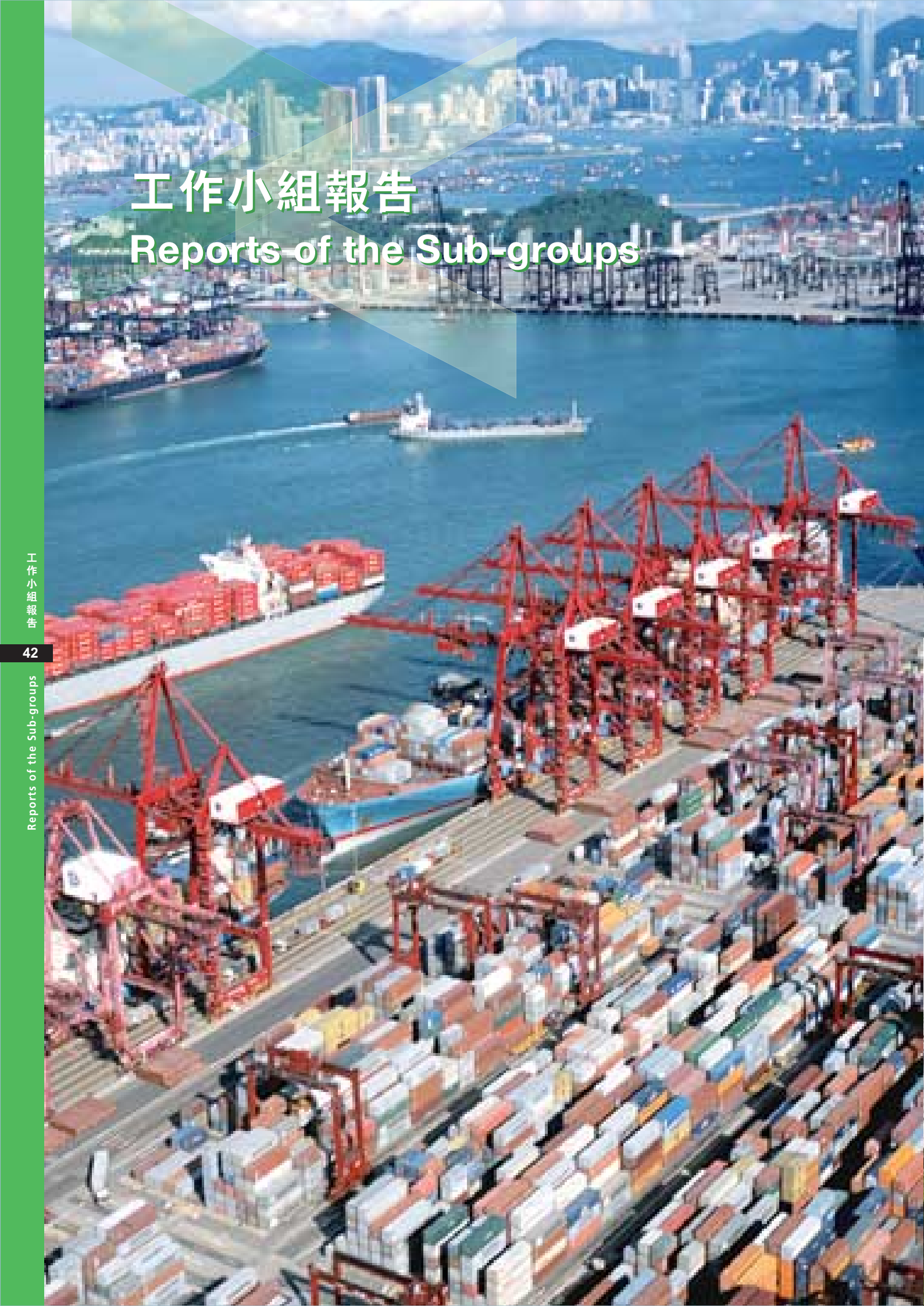
創新科技是深港加強合作的主要領域之一。內地與香港科技合作委員會已把設立深港創新圈的建議列為重點工作之一。該委員會屬高層次組織，成立於2004年，專責制訂和統籌內地與香港的科技合作及交流計劃。隨着深港兩地於2007年5月21日簽署「深港創新圈」合作協議，兩地政府將致力加強創新科技方面的專門知識、資訊及資源交流，從而推展設立「深港創新圈」的建議。至於長遠目標，是把深港這兩個毗鄰地區建設為創新科技活動的世界級地區樞紐。

Shenzhen-Hong Kong Cooperation

To facilitate the implementation of Mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA) and expedite the implementation of cooperation initiatives agreed at the Sixth Plenary of Hong Kong Guangdong Cooperation Joint Conference in relation to Hong Kong and Shenzhen, the Hong Kong and Shenzhen authorities signed the Memorandum on Closer Cooperation between Hong Kong and Shenzhen (MOU) in June 2004. The MOU states that Hong Kong and Shenzhen agreed to strengthen cooperation to promote long-term prosperity in both places. Eight cooperation agreements were also signed at the same time to strengthen cooperation in various areas.

Since then, cooperation between Hong Kong and Shenzhen has become even stronger, with areas extended from trade and infrastructure to tourism, finance, environmental protection etc. In his Policy Address delivered in October 2005, the Chief Executive mentioned Hong Kong would enhance communication and cooperation with Shenzhen in different areas including border control point development, infrastructural planning, food safety and ecological improvements. Against the backdrop of the National 11th Five Year Plan, Shenzhen's 11th Five Year Plan stipulates its emphasis on strengthening cooperation with Hong Kong in various fields such as cross-boundary infrastructure, environmental protection, IT and etc. Shenzhen also reiterated its goal of enhancing its cooperation with Hong Kong to build a world-class city in the "Shenzhen 2030 City Development Strategy" in mid 2006.

One of the major areas of further cooperation between Shenzhen and Hong Kong is innovation and technology. The proposal of building a Shenzhen-Hong Kong Innovation Circle has been included as one of the major initiatives of the Mainland/Hong Kong Science and Technology Co-operation Committee, which is a high-level body established in 2004 to formulate and coordinate programmes for technological collaborations and exchanges between Hong Kong and the Mainland. With the signing of the Shenzhen-Hong Kong cooperation agreement on 21 May 2007, the two governments will strive to enhance exchanges in expertise, information and resources in innovation and technology, with a view to taking forward the proposal of building a "Shenzhen-Hong Kong Innovation Circle". The long-term target is to develop the two neighbouring localities into a world-class regional hub for innovation and technology activities.



工作小組報告

Reports of the Sub-groups

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。

工作小組去年討論的議題

1. 使用深港西部通道的安排

有見於深港西部通道將於2007年中開通，工作小組與香港特區政府有關政策局和部門會面，了解深港西部通道在深圳和香港兩方的接駁道路，以及深圳灣新口岸的通關安排，並希望准許現時持有沙頭角和文錦渡口岸「封閉道路通行證」的車輛使用深港西部通道。

工作小組也建議入境處考慮為經常往返內地的持外國護照商人提供便利通關，例如使用自助過關通道。

Objective and Scope of Work

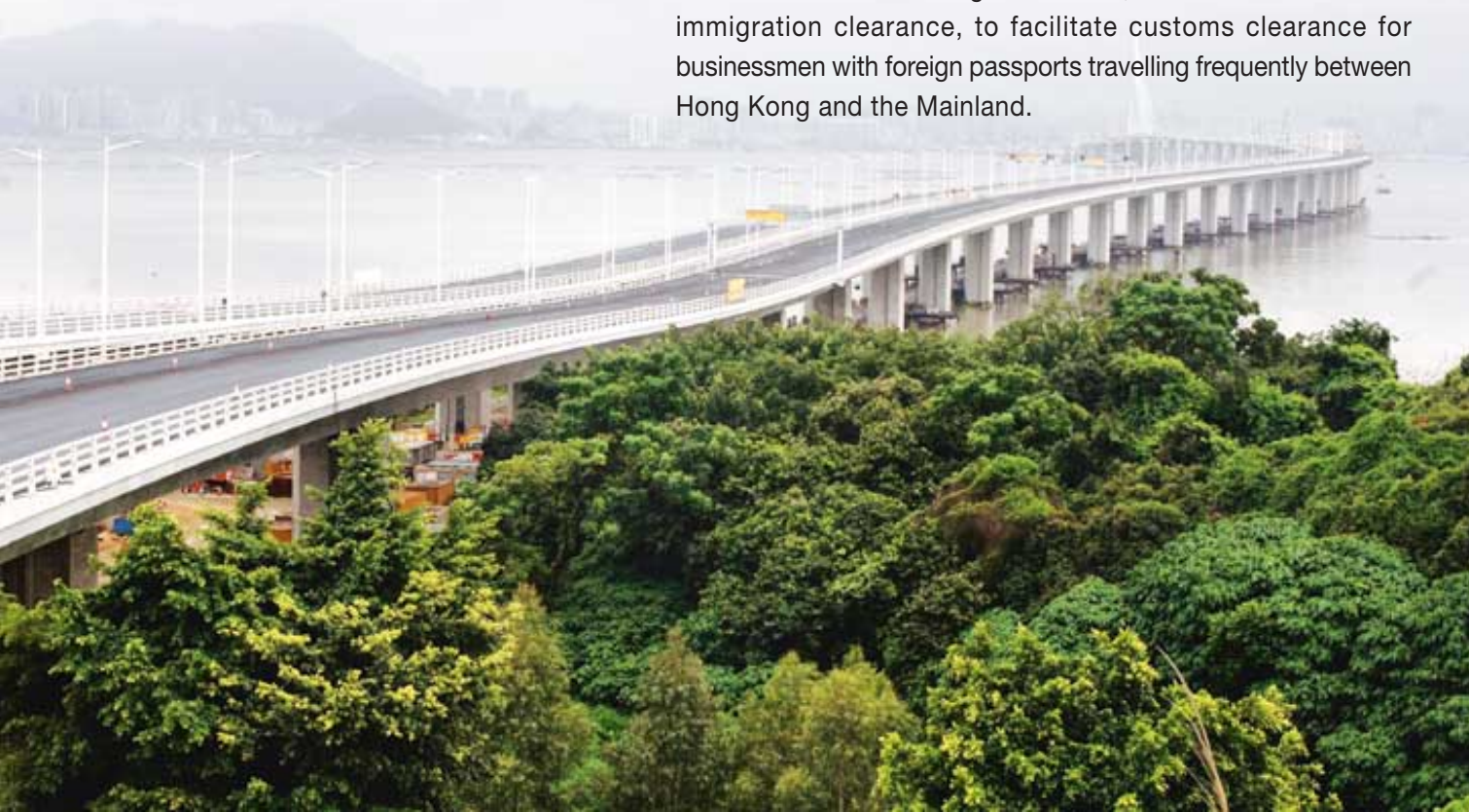
To advise on measures to improve clearance arrangements for smoother passenger and cargo flows between Hong Kong and Guangdong, with a view to enhancing the overall efficiency in business operation of the GPRD as an economic entity.

Issues Covered by the Sub-group during the Year

1. Arrangements on the use of the Hong Kong-Shenzhen Western Corridor:

In view of the commissioning of the Hong Kong-Shenzhen Western Corridor in mid-2007, the Sub-group met with the relevant bureaux and departments of the HKSAR Government to obtain an idea about the feeder roads in Shenzhen and Hong Kong connecting to the Corridor and the customs clearance arrangements of the new control point at Shenzhen Bay. The Sub-group also expressed its view that vehicles with Closed Road Permits of the Sha Tau Kok and Man Kam To Control Points should be allowed to use the Corridor.

In addition, the Sub-group proposed the Immigration Department to consider introducing measures, such as self-service immigration clearance, to facilitate customs clearance for businessmen with foreign passports travelling frequently between Hong Kong and the Mainland.



2. 落馬洲口岸汽車過關情況

由於過境私家車數目有很大增長，工作小組建議於陸路口岸增設「沒有載客」車輛專用通道，以及簡化入境處及海關檢查的安排。

3. 旅客簽證問題

工作小組也就持澳門通行證的內地旅客不能順道來港一事提出建議，希望有關當局能取消限制；而那些持「指定起落點」機票前往內地的旅客，如欲順道來港，必須申請多程出入中國的簽證，費用為單程簽證的兩倍。工作小組建議多程簽證費用可減低，以鼓勵更多旅客順道來港。

2. Vehicle clearance at the Lok Ma Chau Control Point

The Sub-group suggested assigning dedicated corridors at land boundary crossings for vehicles with no passengers and streamlining immigration and customs clearance, having regard to the substantial growth in the cross-boundary private vehicle flow.

3. Visa related issues

The Sub-group also made a proposal for removing the restrictions on Mainland residents visiting Macao with a "Macao only" permit prohibiting them from visiting Hong Kong on the same trip. In addition, overseas visitors who used "point-to-point" tickets to travel into the Mainland were required to apply for a multiple-entry visa if they wanted to visit Hong Kong as part of their China trip, and the fee was double that of a single entry visa. The Sub-group therefore proposed a reduction in the fee of multiple-entry visa in order to encourage more overseas visitors to the Mainland to make a side trip to Hong Kong.



其他工作

工作小組去年5月約見了廣東省外經貿廳副廳長兼口岸辦公室主任招玉芳，向她提出了一些增進跨境人流貨流效率的具體建議，包括粵港兩地政府考慮在各個口岸逐步全面實施「一地兩檢」、容許跨境直昇機載客服務、和以「跨境過路費」取代發牌控制跨境車輛流量。此外，工作小組也建議現時24小時開放的皇崗口岸，在晚上10時至凌晨2時期間，因應貨車流量開放更多通道，舒緩這時段的擠塞情況。

工作小組於去年5月與粵港城市規劃及發展專責小組的「大珠江三角洲城鎮群協調發展規劃研究」小組會面，就研究範圍和探討課題提出了意見。

未來工作重點

工作小組將繼續關注跨境人流貨流效率事宜，例如深港西部通道於今年7月開通時的過境安排和接駁交通情況。

結語

粵港兩地經貿關係愈來愈密切，加上內地更多城市容許內地居民以「個人遊」來港旅遊，深港跨境人流貨流肯定愈來愈繁忙，必須盡快提升通關效率，加開深港口岸，以配合所需。粵港政府合作，共同向中央政府爭取簡化和完善口岸進出境政策，並致力發展通關基建，將可強化大珠三角地區的競爭力，維持地區繁榮增長。

Other Work

In May 2006, the Sub-group met with Ms Zhao Yufang, Deputy Director-General of the Department of Foreign Trade and Economic Cooperation of Guangdong Province and Director General of the Port Administration Office of Guangdong Province. At the meeting, the Sub-group put forward a number of concrete proposals for enhancing the efficiency of cross-boundary passenger and cargo flow, including full implementation of co-location clearance progressively at all boundary control points for the HKSAR and Guangdong Governments' consideration; introduction of cross-boundary passenger helicopter service; and replacing the existing licensing arrangements with a "cross-boundary toll" to control cross-boundary traffic. The Sub-group also proposed that additional customs clearance lanes be opened at the 24-hour Huanggang Control Point between 10 pm to 2 am to accommodate truck traffic and relieve congestion during that period of time.

In May 2006, the Sub-group met with the study group on "Coordination and Development Plan of the Greater Pearl River Delta City Cluster", set up under the Expert Group on Hong Kong/Guangdong Town Planning and Development, and put forward its views on the scope of the study and the issues to be covered.

Future Work Focus

The Sub-group would continue to keep a close watch on cross-boundary passenger and cargo flow, e.g., the cross-boundary measures and the operation of feeder transport service upon the commissioning of the Hong Kong-Shenzhen Western Corridor in July this year.

Conclusion

With the closer economic and trade relations between Hong Kong and Guangdong, and the introduction of more Mainland cities of which residents are allowed to visit Hong Kong under the Individual Visit Scheme, the cross-boundary passenger and cargo traffic between Hong Kong and Shenzhen would be getting heavier. It is therefore important to enhance customs clearance efficiency and build additional boundary control points to meet the growing needs. Collaboration between the HKSAR and Guangdong Governments in lobbying for streamlined and comprehensive policies on cross-boundary clearance and their joint efforts in developing customs clearance infrastructure would enhance GPRD competitiveness and promote its prosperity and economic growth.

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

年內，工作小組已跨越商議階段，進而採取具體行動，協助廣東投資者來港。工作小組與由黃志煒先生擔任組長的粵方工作小組舉行多次會議後，在投資推廣署及駐粵經濟貿易辦事處(駐粵辦)的協助下，曾安排數次聯合投資及貿易推廣宣講會和考察團。從這些活動中，我們逐漸摸索出一個推廣模式，就是先接觸廣東民營企業，再邀請他們來港親身體驗香港的營商環境。

工作進度及意見

協助內地投資者來港

不少廣東企業現時尚未完全了解借助香港「走出去」的優勢。因此，商務委員會的當前要務是協助內地企業，特別是中小型企業，加深認識香港的營商環境，增加他們來港投資的信心。

繼2005年9月於廣州舉辦首個赴港投資實務宣講會後，工作小組再於2006年5月與粵方工作小組、投資推廣署及駐粵辦合辦首個廣東民營企業代表團訪港。是次訪問約有40名廣東企業代表參加，讓他們可直接了解在港開業的審批程序、相關的香港特區政府部門的運作情況，以及本地專業團體和商會提供的支援。

Objectives and Scope of Work

During the year the Sub-group has moved beyond communication to concrete action in facilitating Guangdong investors to come to Hong Kong. Following several meetings with our Guangdong counterpart chaired by Mr Huang Zhiwei, and with the help of Invest Hong Kong and the Hong Kong Economic and Trade Office in Guangdong (GDETO), the Sub-group organised a few seminars and delegations on joint investment and trade promotion. From these activities, a "template" has begun to emerge, namely, reaching out to private enterprises in Guangdong and then bringing them to Hong Kong for first-hand experience of the Hong Kong business environment.

Work Progress and Suggestions

Facilitating Mainland investors to Hong Kong

Many Guangdong enterprises had yet to fully appreciate the strengths of Hong Kong as a platform for "going out". A priority for the Council was thus to help Mainland enterprises, especially small and medium enterprises, gain a better understanding of the business environment of Hong Kong and enhance their confidence to invest in the territory.

Following the first Hong Kong Investment Promotion Seminar in Guangzhou in September 2005, the Sub-group and its Guangdong counterpart, together with Invest Hong Kong and GDETO jointly organised the first delegation of Guangdong privately-owned enterprises to Hong Kong in May 2006. With about 40 delegates participating, the visit enabled the

Guangdong enterprises to understand first-hand the approval procedures for setting up business in Hong Kong, the operation of the relevant HKSAR government departments, as well as the support offered by local professional bodies and chambers of commerce.





2006年8月，工作小組連同粵方工作小組、投資推廣署及駐粵辦在佛山舉辦第二次赴港投資實務宣講會，參加者多達200人。講者包括廣東省及香港特區政府人員，以及銀行、法律及會計行業的專家；宣講會為廣東企業提供來港開業的實用資訊。

繼佛山的宣講會後，工作小組、投資推廣署及駐粵辦於2006年12月舉辦為期兩天的「立足香港，邁向國際」研討會及考察活動，吸引60間從事零售、貿易、酒店、印刷，以及電子的廣東企業參加。我們以借助香港進軍國際市場為題，向參加者講述在港開業的程序及相關法規，以及如何利用本港推廣產品及服務；此外，我們亦闡述業務拓展策略和各項中小企資助計劃，並介紹有關移居本港的實用意見。此外，我們更安排一個同業洽談會，讓參加者與一批本港商人會晤，交流行業資訊及實際經驗，並探討合作的可能性。

方便經商人士往來

工作小組在先前一項研究中發現一個重要問題，就是廣東民營企業為員工申請來港工作簽證方面遇到困難。因此，簡化廣東投資者來港的入境程序，是工作小組持續跟進的工作。

工作小組曾與香港特區政府相關部門進行正式及非正式討論，研究「資本投資者入境計劃」及「輸入內地人才計劃」等移居計劃所起的作用。工作小組會繼續研究方法，促使內地人才通過公司內部調職安排來港出任行政及管理職位，並鼓勵內地專業人士和人才來港創業。

In August 2006, together with its Guangdong counterpart, Invest Hong Kong and GDETO, the Sub-group presented the second Hong Kong Investment Promotion Seminar to a 200-strong audience in Foshan. With speakers from both the Guangdong and HKSAR governments and private sector experts in the banking, legal and accounting professions, the seminar provided practical information for Guangdong enterprises on setting up in Hong Kong.

The Foshan event was followed in December 2006 by the two-day seminar and study programme entitled "Hong Kong - Platform for Guangdong Enterprises to Go Global". Organised by the Sub-group, its Guangdong counterpart, Invest Hong Kong and GDETO, the event brought 60 Guangdong enterprises ranging from retail, trading, hotel to printing and electronics. Under the broad theme of using Hong Kong as the platform to enter the world market, the delegates were briefed on procedures and regulations on setting up in Hong Kong, product and services promotion via the Hong Kong platform, business expansion strategies, various funding schemes available for SMEs, and practical advice on immigration matters. A matching session was also added in which the delegates meet with a group of Hong Kong businessmen to exchange sector information and practical experience, as well as explore possible cooperation among themselves.

Facilitating movement of business persons

One major issue identified in a previous study conducted by the Sub-group was the difficulty encountered by Guangdong private enterprises in seeking approval for employment visas in Hong Kong for their staff. The facilitation of immigration procedures for Guangdong investors to travel to Hong Kong is thus an ongoing issue pursued by the Sub-group.

Through both formal and informal discussion with the relevant HKSAR Government departments, the Sub-group considered the relevance of the various immigration schemes such as the Capital Investment Entrant Scheme and the schemes of

機構支援

工作小組認為協助廣東企業來港，應由其所在地著手。工作小組經詳細討論及研究後得出結論，認為香港商貿團體的各個機構(包括投資推廣署、駐粵辦、香港貿易發展局、各大商會及業界團體)極需在廣東設立一個聯合平台，用以統籌資訊、避免工作重疊和加強各項推廣工作的成效；商務委員會對此亦表贊同。工作小組會繼續研究整體策略規劃的需要，確保各方的努力可優勢互補，取得更理想成效。

至於已在港植根的內地企業，工作小組認為有需要更深入查找和分析他們所面對的特定問題，從而為他們提供最佳的支援服務。工作小組現正與相關商業機構合力探討可否在港成立商會，協助已來港開業的廣東企業。

總結

截至2006年12月，共有754家廣東企業已獲廣東省政府批准來港開業，涉及的總合約投資額為33.25億美元(265億元人民幣)。若把過去以較非正式渠道來港開業的企業也一併計算，則投資額將遠超此數。投資者對廣東企業並不陌生，因為現時已有56家廣東企業在本港上市。隨着珠江三角洲一帶的經濟不斷融合，粵港雙向貿易和投資的前景一片光明。商務委員會和工作小組會不斷努力探討相關事宜和計劃，務求兩地建立更緊密的經濟關係。

admission for Mainland talents and professionals. The Sub-group would continue to explore ways of facilitating intra-company transfer arrangements for Mainland professionals to take up executive and management positions in Hong Kong, as well as encourage Mainland professionals and talents to set up business in Hong Kong.

Institutional support

The Sub-group considered that facilitation of Guangdong enterprises should start from their home territory. After thorough discussion and deliberation, the Sub-group has concluded, with the support of the Council, that there was a strong need for a unified platform for different organisations of the Hong Kong Inc in Guangdong - including Invest Hong Kong, GDETO, the Trade Development Council, and the various chambers of commerce and industry bodies - to coordinate information, avoid duplication of work, and amplify the effect of various promotional efforts. The Sub-group would continue to study the need for an overall strategic planning to ensure that the effort of different parties are complementary and to achieve better results.

For Mainland enterprises already setting foot in Hong Kong, the Sub-group considered that there was a need to identify and analyse in greater depth the specific problems they encountered, so as to provide them with better support services. The Sub-group was engaging relevant business organisations to explore the concept of setting up a chamber of commerce in Hong Kong to assist Guangdong enterprises operating in Hong Kong.

Conclusion

As of December 2006, 754 Guangdong enterprises had been approved by the Guangdong Provincial Government to set up in Hong Kong, involving a total contractual investment amount of US\$3.325 billion (RMB 26.5 billion). The figures would be much higher if enterprises that came to Hong Kong through less formal channels in the past were also counted. To the investing public, Guangdong enterprises are familiar entities, 56 of them being listed in Hong Kong. With continual economic integration among the Pearl River Delta, bright prospects beckon in the two-way trade and investment between Guangdong and Hong Kong. The Council and the Sub-group would continue to pursue the ongoing issues and projects to help facilitate this closer economic relationship.

目標

隨着更多促進服務業發展的CEPA措施得到落實，工作小組繼續探討如何加強推廣CEPA，就業界所遇到的問題和風險提出可行的解決辦法，並尋找更加創新的方法把CEPA措施轉化為高回報商機，讓大珠三角區域(包括香港)的專業人士和社會大眾一同受惠。

此外，工作小組認為，香港與內地的合作必須做到雙向互惠，而香港正發揮協助全國向前發展的作用。

工作進度

工作小組繼續致力探討如何解決有關香港服務業進入內地市場的困難，包括：

- 申領開業所需的批文／牌照手續繁複；
- 進入內地市場關卡重重，例如門檻很高，又需要在內地獲取專業資格；以及
- 中港兩地專業人士執業的模式各異。

工作小組樂見粵港兩地政府已建立更緊密的合作關係，以提升相關政策及規例的透明度。此外，某些專門行業申請在內地開業的程序亦已簡化。兩地商會及專業團體經常接觸溝通，交流活動已成定制。對於某些難題，我們明白省政府能夠做的工作受到限制，問題必須交由較高層面處理。儘管如此，各方竭力協助尋求可行的解決方法，實在值得讚賞。

Objectives

With more CEPA measures on facilitation of trade in services implemented, the Sub-group continued to explore ways to step up the promotion of CEPA, suggest possible solutions to problems and risks encountered and look for more innovative ways to translate the CEPA measures into high treasure values for the professionals as well as the community in the GPRD region including Hong Kong.

The sub-group also took the attitude that it is important for Hong Kong/Mainland cooperation be a two-way traffic and that Hong Kong is taking its role in contributing to the development of the whole country ahead.

Work progress

The sub-group has continued to work upon the difficulties for the Hong Kong services industry to enter the Mainland market as identified in the past. Those difficulties include:

- the complex procedures in obtaining the necessary approval/licences to start operation;
- the high barriers of entry such as the high entry threshold and the need to obtain professional qualification in the Mainland; and
- the different modes of operation for professional practice in Hong Kong and the Mainland.

The Sub-group was happy to see that the HKSAR and Guangdong governments have forged closer cooperation to enhance the transparency of relevant policies and regulations. Some of the application procedures for setting up professional practice in the Mainland have also been streamlined. Frequent exchanges between chambers of

工作小組也很高興能與科技、教育及人力資源工作小組緊密合作，致力把香港發展成為大珠三角區域的知識樞紐。要進一步發展這區域，我們必需提升本身的教育／專業水準，與世界其他地方現時廣泛採用的標準和準則看齊。兩個工作小組均視此為大珠三角區域的長遠需要，並認為須努力把優點體現出來，此舉亦會惠及下一代。要達到這個目標，我們首先要建立電子平台，讓各大學、專業機構、貿易發展局和其他相關團體，可以把所開辦的各項專業服務訓練課程的資料匯集起來；此舉的主要目的是盡量減少資源重疊，而另一方面是促進不同專業和院校交流開辦這類課程的經驗。

未來路向

工作小組會繼續探討不同途徑及方法，以協助專業人士能掌握CEPA措施到廣東執業，同時亦盡量利用各種方法推動香港發展為區內的知識樞紐。

commerce and professional bodies in both places have become a norm rather than an exception. On some difficult issues, it was appreciated that there were constraints on what a provincial government could do and hence the problems had to be addressed at a higher level. However, the great effort put in to help figure out a possible solution was commended.

The Sub-group was also very happy to work closely together with Technology, Education & Human Resources Sub-group to turn Hong Kong into a knowledge hub for the GPRD region. Further development of the region required upgrading of our educational/professional standards to those widely adopted in many other parts of the world. The two Sub-groups identified this as a long-term need of the region and efforts had to be put in to bring out the benefits which would also be useful for generations to come. The very first step towards this goal was to create an electronic platform where different universities, professional institutes, Trade Development Council and other interested parties could pool together information on the training programmes they run for professional services. The main purpose of this exercise was to minimise duplications of resources. An additional purpose was to provide for cross-discipline and cross-institute experience sharing in organising such training courses.

Way forward

The Sub-group would continue to explore ways and means to facilitate professional practice in Guangdong under CEPA. Moreover, the Sub-group would try all sorts of way to make Hong Kong a knowledge hub of the region.

目標

在「十一五」規劃時期，國家著重環保節能策略的大方向下，香港與大珠三角地區的城市該積極利用既有的經濟資源，為國家的可持續發展任務奠定優良的基礎。故此，可持續發展工作小組認為，除卻要積極加強香港與大珠三角區域的合作外，亦該同時加強香港境內的可持續發展工作，進一步將可持續發展概念，貫徹在日常的經濟行為和生活之中，以促進未來大珠三角經濟的持續增長，為區內城市締造更全面及優質的營商和生活環境。

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，小組認為必須加強區內潔淨生產的意識、改善區域性空氣質素、深化香港與大珠三角的多元交流及各項跨境的社會支援服務。

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2006 - 2007年度共舉行了三次會議，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。其中，包括邀請環保署代表簡介有關在2007年初正式發表《珠江三角洲火力發電廠排污交易試驗計劃》實施方案，和目前香港所推行各項改善空氣質素措施的進展，藉此了解粵港雙方於2010年達致減排目標的可行性和進程。

Objectives

During the 11th Five-Year Plan period, the State's broad strategic direction is to promote environmental protection and energy conservation. To tie in with this direction, Hong Kong and GPRD cities should proactively deploy our existing economic resources to lay a solid foundation for our country's sustainable development. In this connection, the Sustainable Development Sub-group held that, on top of the vigorous efforts in forging closer Hong Kong/GPRD cooperation, we should also promote our sustainability measures in Hong Kong to have the concept of sustainable development further built into our social and economic fabric, thereby fueling continuous economic growth and creating a more well-connected and favourable business and living environment for GPRD cities.

The Sub-group was highly concerned about regional air pollution and growth in cross-boundary people flow, and considered it necessary to raise awareness in the region of clean production, improve the regional air quality, intensify multi-disciplinary exchanges between Hong Kong and GPRD, and strengthen cross-boundary social support services.

Work Plan and Suggestions

To achieve the above objectives, three meetings were held in 2006-07, to which representatives from government departments, research institutions and business associations were invited to provide input on air quality improvement. Among them, representatives of the Environmental Protection Department (EPD) were invited to brief Members on the implementation framework of the Emissions Trading Pilot Scheme for Thermal Power Plants in the Pearl River Delta Region announced officially in early 2007 as well as the progress of existing air quality improvement measures in Hong Kong. The purpose was to gain an understanding of the feasibility and progress of achieving the 2010 emission reduction targets in Hong Kong and Guangdong.

此外，小組亦於去年六月前往廣州，與粵方主事可持續發展工作單位的成員舉行工作會議，就《清新空氣計劃》和《環保潔淨生產》等議題進行工作安排商討和交流意見。2006年 - 2007年度可持續發展工作小組的工作重點如下：

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持續嚴重，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，香港除要加強與廣東省加強溝通，及建立官、商及民三方的合作外，香港亦必須先行作則，藉此內外同步的方式積極推廣及規管潔淨生產的實務工作、改善空氣質素，加速「減排減污」的理想成效早日達致。

1. 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，在去年共同攜手推動區內企業簽署《清新空氣約章》。另外，在2006年11月舉行，以香港總商會、商界環保大聯盟和藍天行動聯合主辦；大珠江三角洲商務委員會為策略性伙伴的「商界攜手共享藍天論壇」上，行政長官曾蔭權代表香港特區簽署《清新空氣約章》，標誌著香港對抗空氣污染的決心。

香港總商會及廣東省貿促會將繼續在大珠三角城市向企業派發這份約章，積極鼓勵在區內設廠的兩地企業以身作則，自願參與這項潔淨生產計劃，減排減污，全面改善空氣質素及提升大珠三角地區的營商和生活環境。

The Sub-group also visited Guangzhou in June last year for a working conference with its Guangdong counterpart to discuss preparatory arrangements and exchange views on issues such as the Project CLEAN AIR and clean production. In 2006-07, the Sub-group focused its efforts on the following areas:

Reducing regional air pollution

The Sub-group considered that environmental pollution in the GPRD, especially air pollution, remained serious and agreed that improvement of regional air quality should top the list of their agenda. In view of the exponential growth of population and industries in the GPRD, Hong Kong must, in its drive to improve regional air quality, strengthen its communication with Guangdong, build up a tripartite cooperation among government, business sector and the general public, and take the lead in implementing exemplary measures. Through the concerted internal and external efforts, we should endeavour to proactively promote and regulate clean production and improve air quality in order to achieve an early success in the reduction of emissions and pollution.

1. Clean Air Charter

The Greater Pearl River Delta Business Council (the Business Council), Hong Kong General Chamber of Commerce (HKGCC), Hong Kong Business Coalition on the Environment (HKBCE), CCPIT Guangdong Sub-Council and the Guangdong Environmental Protection Industries Association joined hands to encourage GPRD enterprises into signing the Clean Air Charter last year. In addition, at the "Business for Clean Air" Joint Conference co-organised in November 2006 by HKGCC, HKBCE and Action Blue Sky with the Business Council as a strategic partner, Chief Executive Donald Tsang signed the Clean Air Charter on behalf of the HKSAR to underline its determination to combat air pollution.

The HKGCC and CCPIT Guangdong Sub-Council will continue their efforts to distribute the Charter to enterprises in GPRD cities and work vigorously to urge both Hong Kong and local manufacturers there to set a good example by joining this voluntary scheme of clean production to reduce emissions and pollution, improve overall air quality and make GPRD a better place to do business and live.



2. 潔淨生產企業參觀

2007年3月，可持續發展工作小組與香港總商會共同組織考察團到位於廣東省佛山高明，參觀當地一家港資企業的生產線、熱電發電廠及污水處理廠等設施，藉此了解珠三角廠商如何運用環保潔淨科技和管理模式，控制生產過程中所產生的廢氣和污水等污染源的排放。這家潔淨生產廠商的例子清楚表明，企業在營商同時兼顧環境保育和高效生產的理想營運模式，不但切實可行，而且更有助經營利潤和品牌價值之提升。小組希望以此企業的成功經驗作為例子，全面推動區內環保潔淨生產的新趨勢。

未來工作

展望未來，工作小組將繼續與兩地政府及各專業部門緊密合作，並就減排減污的政策和技術進行建設性交流，以透過官商民三方的全方位渠道，推廣及推動大珠三角地區的環保潔淨生產工作。此外，小組亦期望促進兩地社會各界多就區內長遠的發展事宜，從全方位的社會政策規劃角度，為區內城市實現可持續發展的理想建立更完備的基礎。其他的重點工作包括：



2. Study visit to a clean production enterprise

In March 2007, the Sub-group and HKGCC paid a joint study visit to a Hong Kong-invested enterprise in Gaoming of Foshan City, Guangdong Province to see its clean production facilities, including its production lines, thermal power plant and wastewater treatment plant. The visit was arranged to facilitate an understanding of how environmental friendly and clean production technology and management model were employed by PRD manufacturers to control the emissions of polluting sources like exhaust and wastewater generated in the course of production. This clean production enterprise was a testimony to the fact that a well-designed business model was not only possible for environmental conservation and efficient production but also instrumental in boosting profits and brand value. The Sub-group hoped that the success of this enterprise could serve as an example to set extensively in the region a new trend of clean production.

Future Work

Looking forward, the Sub-group would continue to work closely with the governments and professional agencies of both places and facilitate constructive exchanges on policies and technologies pertaining to emissions and pollution reduction with the aim of promoting environmental friendly and clean production in the GPRD region through multi-dimensional measures on the basis of a tripartite partnership among government, business sector and the general public. The Sub-group would also strive to encourage different sectors in both places to approach the planning of long-term regional development more from a panoramic social policy perspective with a view to laying a more solid foundation for the sustainable development in GPRD cities. The Sub-group would also focus its attention on other areas including:



粵港潔淨生產研討會

可持續發展工作小組將在廣州與中國國際貿易促進委員會廣東省分會及廣東省環保產業協會，聯合主辦「節能減排培訓研討會」。研討會將就香港與廣東省企業推行潔淨生產的情況進行技術交流，時間為2007年6月。

《清新空氣約章》簽署運動

除繼續在大珠三角地區推廣《約章》的簽署運動之外，為進一步推展《清新空氣約章》新一階段的工作，香港總商會正籌劃於2007年下旬推出自願性參與的「認證制度計劃」，藉此鼓勵簽署約章的企業積極推行及達成潔淨生產或營運計劃的指標，小組將繼續支持這方面的工作。

跨境的社會支援服務

在促進兩地社會融合發展方面，小組將繼續保持與粵港兩地的政府和民間團體緊密交流，推動兩地社會各界收集更多有關跨境流動人口的數據資料，就區內長遠的發展規劃提出更全面及可行的政策建議，為兩地社會的可持續發展及和諧融合的未來，創造更穩健的基礎。

Seminar on clean production in Guangdong and Hong Kong

The Sub-group would co-organise a seminar in Guangzhou with the CCPIT Guangdong Sub-Council and the Guangdong Environmental Protection Industries Association. The seminar, tentatively named "Seminar on Clean Production", sought to foster technological exchanges in clean production adopted by Hong Kong and Guangdong enterprises. The seminar was scheduled in June 2007.

Clean Air Charter signature campaign

On top of the continued efforts to promote the Clean Air Charter signature campaign in the GPRD region, new initiatives would be introduced to take the Clean Air Charter forward in the next phase. In this connection, the HKGCC was working on a plan under which a Clean Air Certification Scheme would be launched in second half of 2007, a voluntary scheme aimed at encouraging Charter signatories to take active measures to implement and meet the targets of clean production or operation.

Cross-border social support services

For better social inclusion of the two places, the Sub-group would continue to maintain close communication with the governments and non-governmental organisations of the two places and incentivise different sectors in both places to collate more information on cross-boundary floating population with a view to making more comprehensive and practical policy recommendations for long-term regional development and planning, hence laying a more solid foundation for sustainable development and social inclusion of both places.



科技、教育及人才資源工作小組 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；
以及
3. 與廣東省及各主要城市就有關範疇建立更緊密的連繫。

工作進度及意見

教育及人才培訓

工作小組去年致力研究商務委員會可如何協助粵港政府配合大珠三角區整合經濟體系的教育及培訓需要。小組集中討論兩項議題，第一是與家人居於內地的港人兒童人數不斷上升，如何配合這方面的教育需要；第二是使廣東現有人才培訓課程更加透明和聚焦。

對於第二項議題，我們與服務業發展工作小組緊密攜手研究，而推展相關措施的工作則會由該工作小組負責。此外，我們與香港的大專院校討論時，發現珠三角地區的人力資源及專業培訓課程並非廣為人知，亦未有廣泛宣傳。我們認為設立網站集中處理這類課程的資訊，並提供連接有關大學網站的超連結，將會是一項有用的措施。香港貿易發展局亦同意與商務委員會合作，就建議設立一個專為跨境學員提供人力資源及專業培訓資訊的網頁，進行研究。此舉無疑對有關工作有所裨益，但要取得成效，在營運網站方面必定需要開支，參與的大學亦須積極提供資料。服務業發展工作小組將會負責推展這項計劃。

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 course of the year, the Sub-group considered ways in which the Council could support efforts by the Governments of HKSAR and Guangdong to serve the educational and training needs of an integrated regional economy. Discussion focused on two issues: meeting the educational demand of an increasing number of Hong Kong children who with their families now reside in the mainland, and providing greater transparency and focus to existing programmes on human resources training in Guangdong.

On the latter issue, we worked closely with the Services Industry Development Sub-group, which will spearhead initiatives going forward. In discussions with Hong Kong's tertiary institutions, we found that human-resources and professional training programmes in the Pearl River Delta are often not widely known and publicised. We agreed upon the usefulness of establishing a web site that would serve as a clearinghouse for information about such programmes, with hyperlinks to sites maintained by individual universities. Hong Kong Trade Development Council agreed to cooperate with the Business Council to look into the proposal of creating a webpage to provide information on human-resources and



本港部分兒童因家長選擇而居於廣東，要為這些兒童提供港式教育服務殊非易事，當中牽涉為境外港人提供香港社會服務的可行性問題。小組在討論於廣東設立港式課程學校時，得悉香港特區政府有關部門會在有需要時為回港就讀學生提供支援和作出入學安排，小組亦明白這個課題會對香港特區政府其他社會政策帶來廣泛的連帶影響。中央政策組將會展開研究，探討在珠三角三個城市(深圳、東莞和廣州)定居港人的需要、求助模式，以及融入當地社區的情況。這項研究相信會有助了解相關課題及其政策影響。

professional training, aimed at cross-boundary participants.

Clearly, such a programme adds value but to be effective will incur maintenance costs and active input from participating universities. The Services Industry Development Sub-group would take this project forward.

The question of providing Hong Kong-curriculum educational services to children residing in Guangdong as a result of family choice is not an easy one. It touches on the general issue of the feasibility of providing Hong Kong's social services outside of Hong Kong. During discussion of the issue of establishing Hong Kong curriculum schools in Guangdong, the Sub-group noted that intensive support programmes and school placement services would be available for returning students, if needed, and that this issue had wide and read-across implications for other social policies of the HKSAR government. The Central Policy Unit will be conducting a study to examine the needs, help-seeking patterns, and integration into local communities of Hong Kong people in three municipalities (Shenzhen, Dongguan and Guangzhou) in the Pearl River Delta. The study is expected to throw light on relevant issues and their policy implications.



科技合作

去年，工作小組得悉粵港兩地政府繼續加強兩地科技合作。特別值得一提，是粵港科技合作資助計劃自2004年至今已連續推行三年。該計劃旨在鼓勵兩地的研究機構和企業加強協作，攜手進行應用研發項目，從而鞏固兩地的研發實力，協助提升大珠三角地區的科技水平。此外，香港特區政府和深圳市政府正加強合作，就興建「深港創新圈」的建議商討推行措施。工作小組支持這方向的發展，並會從商界角度，對可深化粵港科技合作的任何進一步措施提供意見。

創意產業範圍廣闊，包括設計、電影和文化活動等。工作小組得悉香港特區政府各決策局正致力有關工作，並已着手與珠三角地區合力推動創意產業發展。

未來工作

工作小組會謀求方法協助政府發展新的教育政策思維。至於香港及珠三角的創意工業發展方面，工作小組亦會協助當局採取措施，以提高政策清晰度和爭取更多商界支持和合作。

Technology Cooperation

In the past year, the Sub-group noted that the HKSAR and Guangdong Provincial Governments continued to strengthen technological cooperation between the two places. In particular, the Guangdong-Hong Kong Technology Cooperation Funding Scheme has been implemented for three consecutive years since 2004. The Scheme aims to encourage more collaboration between research institutions and enterprises in Hong Kong and Guangdong in carrying out applied research and development projects, thereby consolidating the respective strengths of the two places and facilitating technology upgrading in the GPRD region. Moreover, the HKSAR and Shenzhen Municipal Governments were working to strengthen cooperation and discussing measures to take forward the proposal to build the "Shenzhen-Hong Kong Innovation Circle". The Sub-group supports the development in this direction and would provide feedback, from the business perspective, on any further initiatives which could be pursued to further Hong Kong/Guangdong technological cooperation.

In the area of creative industries which covered a wide range of activities including design, film and cultural activities, etc, the Sub-group noted that various bureaux in the HKSAR Government were working on these aspects and already engaged in cooperation within the PRD region.

Future Work

The Sub-group will seek ways to support any Government efforts to develop new initiatives in the education sector. It will also support initiatives aimed at providing greater policy clarity and scope for business support and cooperation in the development of creative industries in Hong Kong and in the Pearl River Delta.

專題研究報告

Report on Research Study

內地加工貿易政策對香港的影響

Impact of Mainland Processing Trade Policy on Hong Kong

2006年底內地降低及取消部分產品的出口退稅，擴大加工貿易禁止類商品目錄，並提出對加工貿易禁止類商品目錄實行動態調整。據此，商務部於2007年4月再公佈新的加工貿易禁止類商品目錄，對不可以加工貿易方式進出口的商品再作增減。同時商務部於4月發出通知，要求各級商務主管部門將環保、能耗、用工、設備水平等指標納入加工貿易企業經營狀況及生產能力核查範圍，作為對企業開展加工貿易業務的審批依據，建立加工貿易企業准入制度。

內地調整加工貿易政策目的是要促進加工貿易「轉型升級」和控制「兩高一資」。為了達到這政策目標，據瞭解，內地將進一步對加工貿易的產品分類管理目錄進行調整，研究將勞動密集、產業鏈條短、增值低、容易引起國際貿易摩擦和海關難以監管的產品納入加工貿易限制類目錄。

內地調整加工貿易政策的原因

加工貿易對推動內地出口增長和就業貢獻重大。有專家認為加工貿易是中國貿易增長的主要動力，為中國帶來新產品、新技術，使中國形成了符合國際市場要求的製造業平臺，為產業結構的進一步升級打下良好基礎。亦有研究指出加工貿易總額每增長1%，中國的生產總值大概增長0.29%。

據內地統計，全中國現有加工貿易企業9萬多家，在廣東有超過7萬家。據估計，全廣東省在加工貿易企業的就業人員超過1 600萬人。2006年加工貿易進出口總額達到8,319億美元(66,327億元人民幣)，佔中國對外貿易總額47.2%。

At the end of 2006, China reduced and removed the export VAT rebates for certain products, expanded the prohibited category under processing trade, and announced that the prohibited category will be adjusted from time to time. In April 2007, the Ministry of Commerce (MOFCOM) published the adjusted prohibited category under processing trade, making additions and deletions to the list of products prohibited from import and export in the form of processing trade. In the same month, MOFCOM also issued a circular calling on commerce departments at all levels to take environmental protection, energy consumption, employment conditions, equipment level and other factors into consideration in evaluating the business operation and production capacity of processing trade enterprises applying for approval to engage in processing trade activities, thereby establishing the threshold for participating in processing trade.

Promoting the transformation and upgrade of processing trade and restricting the production of products with high pollution, high energy consumption and resource consumption are China's objectives in adjusting its processing trade policy. To achieve these targets, it is understood that further adjustments will be made to the catalogue of products managed by category under processing trade. Steps will also be taken to include products that are labour-intensive, low in value-added, short in industry chain, easy to cause trade friction and difficult for customs supervision in the restricted category under processing trade.

Reasons for Processing Trade Policy Change

Processing trade has made a significant contribution to export growth and job creation in the Chinese mainland. One expert reckons that processing trade is the key driver of China's trade growth and has brought in new products and new technologies which have helped turn the country into a manufacturing platform that meets the requirements of the international market, and lays a solid foundation for furthering China's industrial structure upgrade. A study has also found that for every 1% growth in processing trade there will be a corresponding 0.29% increase in China's GDP.



近年內地貿易順差大幅上升，一方面加大了人民幣升值的壓力，亦引發了與外國的貿易摩擦增加。與此同時，中國的工業能源與資源消耗過高，製造業環境污染嚴重。鑒於加工貿易與中國龐大的貿易順差關聯度大，而且是中國開放初期鼓勵投資的一種優惠政策，對企業不設門檻，因此國家因應形勢，對加工貿易進行調整。

調整對珠三角港資加工業的影響

港商在內地企業從事加工貿易非常普遍。據香港工業總會的最新調查顯示，港商目前在珠三角以各種形式投資的工廠共57 500家，僱用工人共960萬名。接受調查的企業出口結構中，15.5%屬於一般貿易，34.0%屬於進料加工，47.4%屬於來料加工，其餘3.2%屬於其他方式。

加工貿易政策改變，對國家進出口的影響立竿見影。2006年9月內地將部分常用原材料包括皮革、紙和部分金屬產品列入加工貿易禁止類目錄，雖然後二者在11月已可恢復進行加工貿易，但已對受影響的港商帶來很大的衝擊，包括無法進口或從其他工廠轉入所需生產用原料/半製成品，使供應鏈中斷。2006年10月廣東省進口和出口分別較上一個月下跌11.7%及4.4%，相信很大程度就是受這個原因所致。

珠三角加工業發展多年，已形成很長的產業鏈，而各產業集群之間的相互依存關係亦非常大。因此生產鏈中任何一個加工環節斷裂，其影響面可以很大。根據貿發局的調查，目前在珠三角的加工企業日常生產運作需要其他企業提供配套的一般涉及1-5個不同產品或工序，主要包括包裝、模具、五金配件、五金電鍍、塑膠配件和漂/印染等。而42.4%的加工企業表示他們的製品會在內地透過轉廠形式供應其他下游生產商，一般轉給下游企業的產品約佔其總生產的三成。

According to mainland statistics, more than 90 000 processing trade enterprises are currently operating in China, of which 70 000 are located in Guangdong. Over 16 million people are estimated to be working for processing trade enterprises in Guangdong. In 2006, total imports and exports related to processing trade amounted to US\$831.9 billion (RMB 6,632.7 billion), accounting for 47.2% of China's total foreign trade.

The surge in China's trade surplus in recent years has not only exerted great pressure on the Renminbi to appreciate in value but has also triggered increasing trade friction. At the same time, the rate of energy and resource consumption by China's industries is excessively high, and environmental pollution caused by manufacturing activities is serious. As processing trade was first introduced as a preferential policy to attract foreign investment in the early days of China's opening-up, no access requirements were set. In view of the strong correlation between processing trade and China's huge trade surplus, adjustments of the processing trade policy are necessary to cope with changing circumstances.

Impact on Hong Kong-invested Processing Activities in PRD

Hong Kong companies are extensively involved in processing trade in the Chinese mainland. According to the latest survey conducted by the Hong Kong Federation of Industries, 57 500 Hong Kong-invested factories are operating in the PRD in various forms employing 9.6 million workers. In terms of the export structure of the surveyed companies, 15.5% fall under general trade, 34% are processing with imported materials, 47.4% are processing with supplied materials, and 3.2% are others.

The impact of processing trade policy change on China's import and export has proven to be immediate. In September 2006, certain commonly used raw materials including leather, paper and certain metal products were added to the prohibited category under processing trade. Although processing activities using the latter two subsequently resumed in November 2006, the disruption already dealt a severe blow to Hong Kong investors concerned. For instance, they were unable to import or transfer from other factories the raw materials/semi-manufactures needed for production, which in turn disrupted their supply chain. In October 2006, the imports and exports of Guangdong fell 11.7% and 4.4% from the previous month respectively. This decrease is believed to be largely attributable to the processing trade policy change.



加工貿易政策進一步調整的方向和港商應對策略

促進加工貿易「轉型升級」，控制「兩高一資」已是國家既定的政策方向和目標。有關部委將會繼續對加工貿易進行動態調整。調整方向是要有針對性地對國家不再支持或者是要限制的行業/出口，取消進口保稅優惠（加工貿易禁止類），取消或降低出口退稅，和提高加工貿易的企業准入門檻。調整原意是提高企業出口成本，將原本屬於企業承擔的社會成本內部化。

事實上，過去數年港商在珠三角已因工資上升、人民幣升值等要面對生產成本大幅上升的壓力。另一方面，由於市場競爭激烈，出口價格無法上升，加工貿易的邊際利潤目前一般只有10%，較五年前18%大幅下降。

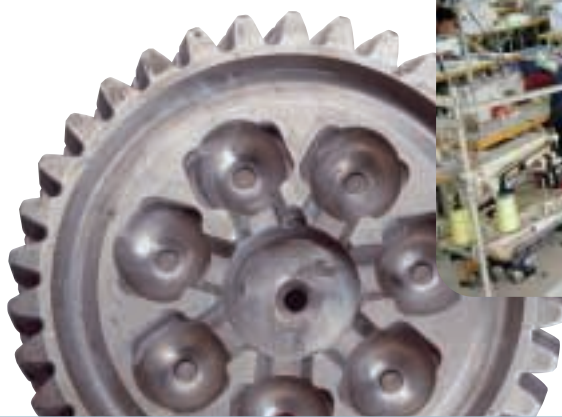
為了降低成本，據貿發局調查，有37.3%在珠三角的企業已有計劃將全部或部分生產遷離珠三角，主要是希望遷到珠三角以外的廣東其他地區和廣東以外的泛珠三角地區。但長遠而言，大部分港商認同轉型升級才是他們的發展方向。在貿發局的調查中，53.1%的港商表示會選擇透過開發質素更佳的产品令企業升級；45.1%表示會改善產品設計，進行創新；35%更會考慮開發自有品牌。另外，超過三成半的港商亦表示會加強內部管理，包括庫存管理、生產自動化等幫助企業升級和控制成本。

After long years of development of processing trade activities in the PRD, a long industry chain has been formed in the region characterised by a high degree of inter-dependence among various industry clusters. Hence, any disruption in the processing link along the production chain will have serious repercussions. According to the study conducted by TDC, a processing trade enterprise in the PRD generally works with one to five different products or production processes in their daily operation that involve other enterprises. These mainly include packaging, moulds, hardware parts, electroplating, plastic parts, and bleaching/dyeing. About 42.4% of the processing trade enterprises indicate that their products would be supplied to other downstream manufacturers in the mainland in the form of factory transfer. Such transfer-out products account for about 30% of their total output.

Directions of Further Policy Change and Recommendations for Hong Kong Companies

Promoting the transformation and upgrade of processing trade and restricting the development of high pollution, high energy consumption and resource consumption industries are China's policy directions and objectives. To this end, the relevant ministries will continue to make adjustments to processing trade from time to time. The major directions include abolishing the bonded treatment of imports for industries and exports that are restricted or no longer supported by the state (such as those under the prohibited category in processing trade), removing or reducing export tax rebates, and raising the access threshold for processing trade enterprises. These adjustments were intended to increase the export cost of enterprises and "internalise" the social cost which should have been borne by the enterprises.

Indeed, Hong Kong companies operating in the PRD have been facing immense cost pressures in the past few years due to rising wages and Renminbi appreciation. At the same time, fierce market competition means that there is no room for export price increase. As a result, the profit margin of processing trade has dropped from 18% five years ago to 10% at present.



轉型升級是需要大量資金的長線投資。對大部分企業而言，他們的主要考慮是產品的市場潛力、本身的財政資源和管理/技術專業知識。此外，內地穩定明確的政策也很重要，讓企業可以清楚計算投資成本和回報。

加工貿易受損對大珠三角經濟的影響

加工貿易的發展對香港的進出口以至相關的運輸服務有著重要的影響。2006年，原產內地經香港轉口往其他地區的貨品當中，有80.7%屬於外發加工貿易，達1,045億美元(8,332億元人民幣)，約佔香港轉口總值的35%。同期，香港從內地進口的貨品總值中，有64.5%屬於外發加工貿易，達986億美元(7,861億元人民幣)，佔香港進口總值的30%。

雖然絕大部分的香港製造業已把生產活動遷移至內地，但據貿發局的調查顯示，大部分企業仍以香港為營運總部或管理指揮中心。根據香港中文大學與貿發局的共同研究，分別運用投入產出模型及經濟計量模型進行分析，證明香港工業即使北移，其帶動的貿易及服務業需求，對香港的經濟和就業貢獻良多，所創造的間接就業職位，不能忽視。

根據貿發局對在珠三角從事生產的企業調查，31%企業最受加工貿易政策和出口退稅降低所影響，而當中10.5%的企業表示，如果所需原輔料件/產品不再享受加工貿易保稅進口政策，他們將會因成本上升無法競爭而將會停產或收縮。此外，55.3%的企業表示如果他們進口原材料件時要繳付全數的關稅和增值稅作保證金，即「實轉」，將對他們的流動資金構成沉重負擔，以至影響公司經營。



The TDC study has found that in order to cut costs, 37.3% of the enterprises in the PRD have plans to relocate all or part of their production activities to other parts of Guangdong province or other Pan-PRD provinces. But most Hong Kong investors agree that in the long run transformation and upgrade are the ultimate direction for development. In the TDC study, 53.1% of the responding Hong Kong companies indicate they will seek upgrade through developing better quality products, 45.1% through improving product design and engaging in innovation, and 35% through building their own brands. Over 35% of the respondents say they would strengthen internal management, including inventory control and production automation, to achieve corporate upgrade and better cost control.

Transformation and upgrade involve huge amount of long-term investment. To most companies, their major concerns are the market potential of their products, their financial resources, and their professional management/technical expertise. Moreover, clear and consistent mainland policies are vital in enabling them to work out the cost and return of their investments.

Impact of Suppressed Processing Trade on Greater PRD

The development of processing trade has significant implications for Hong Kong's import-export trade as well as the related transport services sector. In 2006, 80.7% of Hong Kong's re-exports of China origin were related to outward processing. Such re-exports were worth US\$104.5 billion (RMB 833.2 billion), accounting for 35% of Hong Kong's total re-exports. During the same period, 64.5% (or US\$98.6 billion) (RMB 786.1 billion) of Hong Kong's imports of China origin were related to outward processing, accounting for 30% of Hong Kong's total imports.

The TDC study has found that although the vast majority of Hong Kong manufacturers have relocated their production facilities to the mainland, most of the surveyed companies have maintained their operation headquarters or control centre in Hong Kong. According to a research project undertaken jointly by the Chinese University of Hong Kong and TDC, technical input and output tables as well as economic models were used for conducting analysis and it was found that despite the relocation of Hong Kong's industries across the boundary, the demand for trade and business services generated by the move has made a significant contribution to Hong Kong's economy and employment market. In particular, the number of indirect jobs created cannot be underestimated.



雖然大部分深受影響的港資加工企業持觀望態度，但有73.2%的企業表示若內地加工貿易政策調整在最壞情況下發展至取消所有進口保稅的優惠待遇，他們可能會因不能適應而被迫結業或收縮。

按以上調查結果推算，國家如全面取消加工貿易稅務優惠待遇，最壞的情況可能導致：

According to the TDC survey on production enterprises in the PRD, 31% are the hardest hit by the processing trade policy change and export tax rebate reduction. Among them, 10.5% indicate that if the imported raw and auxiliary materials and products needed for production are no longer eligible for bonded treatment under processing trade, they will have to stop or scale back their production as their competitiveness is eroded by the cost hike. Another 55.3% of the surveyed companies indicate that if they are required to make "actual payment" of customs duty and VAT as deposit for the importation of raw materials, it will pose a heavy burden on their cash flow which will in turn affect the operation of their company.

While most of the affected Hong Kong-invested processing enterprises adopt a wait-and-see attitude, 73.2% of them indicate that if the mainland authorities further tighten the processing trade policy to the extent of abolishing processing trade altogether, they may be forced to cease or downsize their operations.

According to the above-mentioned survey findings, if China removes all preferential tax treatments for processing trade, the worst scenario will be as follows:

1.45萬家香港企業將受嚴重影響 14 500 Hong Kong companies will be seriously affected	
<ul style="list-style-type: none"> 1 500家企業將會停產 1 500 enterprises will cease production 	<ul style="list-style-type: none"> 1萬家企業可能停產或收縮 10 000 enterprises may cease or scale back production
<ul style="list-style-type: none"> 37.5萬內地生產工人面臨失業 375 000 mainland production workers will lose their jobs 	<ul style="list-style-type: none"> 250萬內地生產工人職位受威脅 2.5 million mainland production worker jobs will be under threat
<ul style="list-style-type: none"> 1萬在港企業員工面臨失業 10 000 Hong Kong employees of the enterprises concerned will lose their jobs 	<ul style="list-style-type: none"> 7萬在港企業員工受影響 70 000 Hong Kong employees of the enterprises concerned will be affected

港商應對調整的困難

港商應對加工貿易政策調整，不管是發展品牌、創新或遷移，均需要大量資金。不少港商由於缺乏財政資源，特別是來料加工廠向銀行貸款困難多，對轉型升級可能有心無力。即使財政可以解決，但目前內地加工貿易政策前景未明，港商亦不敢作長線投資。此外，由於大部分香港企業都缺乏品牌管理、產品及技術研發的經驗和知識，轉型升級所涉的市場風險對他們形成很大障礙。

Difficulties Facing Hong Kong Companies

In coping with the mainland's processing trade policy change, the strategies adopted by Hong Kong companies, such as brand development, innovation or relocation, all involve huge capital. For the many Hong Kong companies which lack financial resources, in particular factories engaging in processing with supplied materials which have great difficulties in obtaining bank loans, transformation and upgrade are something beyond their means. Even if the problem of finance can be solved, the current uncertainties brought about by the mainland's processing trade policy change have kept Hong Kong companies off from making long-term investment. Moreover, since the majority of Hong Kong companies do not have the experience or knowledge in brand management and product and technology R&D, the risks involved in transformation and upgrade are great hurdles for them.

不少港商目前仍以「來料加工」形式在珠三角生產和出口，他們要改以一般貿易方式生產和發展內銷，必須由來料加工改為「三資企業」。但目前內地對這些企業改為三資企業沒有明確一致的審批程序和手續，且辦理解除海關監管的時間長達6-9個月，影響正常生產。

根據現行台帳分類管理辦法，部分A類企業憂慮從「來料加工」轉為「三資企業」時，因新成立企業沒有出口業績而被評為B類企業，因而要付出龐大的進口保證金，構成資金壓力。

建議

香港大部分企業都明白加工貿易調整的必要性並願意配合。「轉型升級」是內地和香港的共同願望，實際數據亦表明內地加工貿易除了規模擴大外，其產品結構已經在升級，產業鏈也在延長。本報告深信市場力量會繼續推動加工貿易升級，遷移或轉型。在過程中，報告建議內地必須維持清晰穩定的政策大方向，並在推出具體調整前進行諮詢及提供合理過渡適應期，並加強與香港特區政府的溝通。

在協助企業轉型升級方面，報告希望有關方面能因勢利導，提供配套安排和協助，幫助企業由來料加工轉為三資企業，鼓勵內銷。動態調整政策時，要避免令產業鏈中任何一個環節的企業因無法過渡而影響大珠三角產業鏈的完整性和競爭力。

At present, many Hong Kong companies are still engaging in production and export in the PRD in the form of processing with supplied materials. To shift to production in the form of general trade and domestic sales development, they must change their operation mode from processing with supplied materials to foreign-invested enterprise (FIE). However, at the moment the mainland does not have a set of clear and unified procedures for examining and approving such processing enterprises applying for conversion into FIEs. Moreover, since it takes six to nine months for these processing enterprises to apply for removal of customs supervision, their normal production will be affected.

Under the current customs duty deposit system whereby enterprises are managed by category, some Category A enterprises are worried that to convert from the operation mode of processing with supplied materials to FIE, they may be downgraded to Category B since they will become newly established enterprises with no export performance track record. And as such, they will have to pay a large sum of import duty deposit which would create considerable cash flow pressure.

Recommendations

Most Hong Kong companies recognise the necessity of the processing trade policy change and are willing to take the appropriate action to cope. In fact, "transformation and upgrade" of processing trade are the common goal of Hong Kong and the mainland. Statistics also show that processing trade in the mainland has not only expanded in scale but its product structure has also been upgraded and industry chain extended. It is the projection of this report that market forces will continue to drive processing trade forward in terms of structural upgrade, relocation and transformation. It is also recommended that during this process the mainland authorities should maintain a clear, consistent policy direction, carry out advance consultation before introducing policy adjustments, allow for reasonable transition periods, and strengthen communication with the HKSAR Government.

In providing assistance to enterprises in transformation and upgrade, this report recommends that the authorities concerned should, based on actual circumstances, give support and guidance to help enterprises convert from the operation mode of processing with supplied materials to FIE, and encourage them to develop domestic sales. In introducing policy changes from time to time, efforts should be made to avoid forcing enterprises in any link of the industry chain out of business as this will break the continuity and undermine the competitiveness of the industry chain in the Greater PRD region.





建議中央政府：

- 為企業由「來料加工」改為「三資」提供清晰指引和特別寬鬆安排，使企業可在短時間內原地、原廠、原工人、原業績改變註冊模式和法人登記繼續生產經營並發展內銷。
- 接受加工企業以「銀行保證」或「保險保單」為台帳保證金，減少企業因實轉要求而面臨資金周轉困難。
- 為彌補以產品稅號分類進行調整的可能缺陷，考慮在調整時加入考慮「生產技術水平」、「自主品牌」、「自主設計」等因素，以支持加工企業在轉型時多作「自主創新」方面的投資。

建議廣東省政府：

- 提供「一站式」的諮詢服務，統一各地方的執行措施，幫助企業加快辦理「來料加工」改「三資」的申請。
- 加快興建一批有中央排污設施的環保園，讓企業作搬遷的選擇。

建議香港特區政府及有關機構：

- 就加工貿易政策調整加強與中央及香港商界聯繫，做好溝通和諮詢工作。
- 加強為企業提供市場資訊，協助港商將業務重心由出口轉至內銷市場。
- 加強推廣「香港品牌」，協助更多企業發展自主品牌產品。
- 調整現有「中小企業信貸保證計劃」，協助紓緩企業在轉型過渡期的財政困難。

The Central Government is recommended to:

- Provide clear guidelines and lenient arrangements for enterprises operating in the form of processing with supplied materials to convert into FIEs so that these enterprises can change their business registration and legal person registration and continue their existing production activities and develop domestic sales within a short period of time by keeping their original location, original factory, original workforce and original export records.
- Allow processing enterprises to provide "bank guarantee" or "insurance policy" as customs duty deposit in order to alleviate their cash flow problem caused by the "actual payment" requirement.
- Take factors such as "production technology level", "proprietary brand" and "proprietary design" etc into consideration when making policy changes in order to encourage processing enterprises to make more investment in "proprietary innovation" in the course of transformation. This can also serve to compensate the shortcomings caused by policy changes involving the categorisation of products by tariff code.

The Guangdong Provincial Government is recommended to:

- Provide "one-stop" consulting service, unify the implementation measures of different localities, and expedite the processing of applications for conversion from "processing with supplied materials" to "FIE".
- Expedite the construction of eco parks featuring centralised sewage treatment facilities to give enterprises more options for relocation.

HKSAR Government and related organisations are recommended to:

- Strengthen the ties between the Central Government and the Hong Kong business community and step up communication and consultation work.
- Strengthen the provision of market information to Hong Kong enterprises and assist them in shifting their business focus from export to domestic sales on the mainland market.
- Step up the promotion of "Hong Kong brands" and assist more enterprises to develop their own brands.
- Adjust the existing "SME Loan Guarantee Scheme" to help alleviate the financial difficulties of enterprises in the course of transformation.

對外聯繫

External Liaison



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有關促進粵港合作的議題和交流意見，亦與香港的主要商會、專業團體、大學，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、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。馮國經主席於2006年8月粵港合作聯席會議第九次會議上，向兩地政府匯報工作進度及介紹未來工作重點。

此外，商務委員會的跨境人流物流工作小組於2006年5月到廣州與廣東省口岸辦招玉芳主任會面。小組召集人梁君彥議員及小組委員向招主任提出對提升口岸通關效率的意見，尤其是關於跨境貨櫃車的清關事宜，並得到招主任的正面回應。

與廣東省貿促會的聯繫

廣東省貿促會是粵港合作聯席會議框架下商務委員會的對口商界組織，兩會一直保持聯繫，共同推動務實的合作工作。

In the past year, the Business Council exchanged views on various issues concerning Hong Kong/Guangdong cooperation 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, professional bodies and universities in Hong Kong as well as the organisations involved in forging cooperation between the two places. The Business Council would like to thank these organisations for their support.

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 ninth plenary meeting of the Joint Conference held in August 2006, Council Chairman Dr Victor Fung reported work progress to HKSAR and Guangdong governments and gave a briefing on the Council's work plan.



廣東省貿促會葉耀會長於2006年6月與馮國經主席會面，就兩會的合作事宜交換意見。

工作小組聯繫

商務委員會的聯合投資貿易推廣工作小組於去年與廣東省聯合投資小組舉行多次會議，並在2006年5月首次合辦「廣東省民營企業赴港考察團」。二十多家廣東民營企業的代表參加了為期兩天的投資考察活動，探討如何利用香港作為進軍國際市場的跳板，及在香港開辦業務的機會。另外，兩個小組在2006年8月再接再厲，在佛山舉辦第二次「赴港投資實務宣講會」，向超過200位佛山及廣東省其他地方民營企業代表，介紹到香港開業的手續及香港的投資環境。有興趣在港開業的參加者，更在2006年12月參與第二次的「廣東省民營企業赴港考察團」。

In May 2006, the Business Council's Cross-boundary Passenger and Cargo Flow Sub-group met Ms Zhao Yufang, the Director General of the Port Administration Office of Guangdong Province in Guangzhou. At the meeting, Hon Andrew Leung, the Convenor of the Sub-group, and other group members put forward their views on ways to enhance operational efficiency at boundary crossings, particularly on matters relating to customs clearance of cross-boundary container trucks, and received positive response from Ms Zhao.

Liaison with CCPIT Guangdong Sub-council

The Business Council and the CCPIT Guangdong Sub-Council, its Guangdong counterpart under the framework of the Joint Conference, had stayed in close contact and worked in concerted efforts to take forward substantive cooperation items.

In June 2006, Mr Ye Yao, the President of CCPIT Guangdong Sub-Council, met Council Chairman Dr Victor Fung to exchange views on the cooperation of the two Councils.



商務委員會的可持續發展工作小組在去年繼續與廣東省可持續發展小組保持聯繫，商討如何攜手合作改善大珠三角地區的空氣質素。兩個小組與香港總商會及香港商界環保大聯盟在2007年3月組織了「清潔生產考察」。考察團參觀佛山一家港資企業的生產線、熱電發電廠及污水處理廠等設施，藉此了解珠三角廠商如何運用環保潔淨科技和管理模式，控制生產過程中所產生的廢氣和污水等污染源的排放。兩個小組將會繼續合作，並計劃舉辦「清潔生產研討會」，與廣東省的企業探討如何進一步推行清潔生產，以改善區內空氣質素。

律政司簡報會 - 香港特區與內地交互強制執行商事判決

商務委員會與香港特區政府政制事務局內地事務聯絡辦公室於2006年7月舉辦了簡報會，由署理法律專員向商界代表解釋內地與香港特區簽署的兩地法院相互認可和執行當事人協議管轄的民商事案件判決的安排。當日共有超過五十位商務委員會委員及商會代表出席，了解新的安排。

Liaison between Hong Kong and Guangdong Sub-groups

The Business Council's Joint Investment and Trade Promotion Sub-Group held a number of meetings with Guangdong's GPRD Investment and Trade Promotion Sub-group last year. In May 2006, they co-organised a study visit for the first delegation of Guangdong privately-owned enterprises (POE) to Hong Kong. Representatives from more than 20 Guangdong POEs joined the two-day investment tour to explore how Hong Kong could be leveraged as a springboard for them to go global and the opportunities for setting up business in Hong Kong. In August 2006, the two sub-groups collaborated again and organised in Foshan the second Hong Kong Investment Promotion Seminar, attracting more than 200 POE representatives from Foshan and others areas in Guangdong. The participants were briefed on the setting up procedures and the investment environment in Hong Kong. Subsequent to the event, those interested in establishing a presence in Hong Kong joined the second study programme entitled "Hong Kong - Platform for Guangdong Enterprises to Go Global" organised in Hong Kong in December 2006.



廣東省產業結構轉型及珠三角西部發展 為香港帶來的機遇和挑戰研討會

Seminar on Clarifying the Economic Restructuring and
Development of Western Pearl River Delta
Opportunities and Challenges for Hong Kong

The Business Council's Sustainable Development Sub-group continued to work with its Guangdong counterpart last year to explore cooperation in improvement of air quality in the GPRD region. In March 2007, the two sub-groups co-organised a clean production visit to a Hong Kong-invested enterprise in Foshan in collaboration with the Hong Kong General Chamber of Commerce and the Hong Kong Business Coalition on the Environment to see its production lines, thermal power plant and wastewater treatment plant. The visit was arranged to facilitate an understanding of how environmental friendly and clean production technology and management model were employed by PRD manufacturers to control the emissions of polluting sources like exhaust and wastewater generated in the course of production. The two sub-groups would continue to deepen their cooperation. As part of the efforts in this direction, they were planning a Clean Production Seminar to explore with Guangdong enterprises on how to further promote clean production for improvement of the regional air quality.

Briefing by the Department of Justice: Reciprocal Enforcement of Judgments in Commercial Matters between HKSAR and the Mainland

In July 2006, the Business Council and the Mainland Affairs Liaison Office of the Constitutional Affairs Bureau, HKSAR Government invited the acting Law Officer of the Department of Justice to give a briefing to representatives of the business community on the Arrangement on Reciprocal Enforcement of Judgments in Civil and Commercial Matters by the Courts of the Mainland and of the Hong Kong Special Administrative Region pursuant to Choice of Court Agreements between Parties Concerned, which had been signed by the two places. More than 50 Members of the Business Council and representatives of chambers of commerce attended the briefing to gain an understanding of the new arrangement.

「廣東省產業結構轉型及珠三角西部發展為香港帶來的機遇和挑戰」研討會

商務委員會在2005-06年研究了兩個重要課題，包括「廣東省產業結構轉型對香港的影響」和「珠三角西部的發展及其與香港的合作前景」，兩個研究報告在去年中完成。商務委員會與香港貿易發展局、香港多個主要商會及廣東省貿促會在2006年11月舉辦了研討會，邀請香港特區政府代表、香港業界代表及內地學者參與，就不同界別的角度，分析兩地政府及企業在新挑戰下應作的準備。研討會有超過二百位來自商界的代表出席，並作了熱烈討論。

與內地學者及香港團體交流

廣東省「十一五」規劃與香港

商務委員會在2006年6月的會議，邀請了暨南大學封小雲教授介紹廣東省在「十一五」規劃下的未來發展，特別是基建規劃和經濟發展方向，讓香港對廣東省的未來發展，有更好的掌握，為日後的發展機遇及挑戰作好準備。

與香港專業、學術及有關團體的交流

商務委員會的工作小組，就各自關注的不同課題，與香港的不同機構，包括多個專業團體、大學、培訓機構及商會等舉行了會議及交流意見。

Seminar on Guangdong's Economic Restructuring and Development of Western Pearl River Delta - Opportunities and Challenges for Hong Kong

In 2005-06, the Business Council conducted two major studies, namely, "Guangdong's Economic Restructuring - Opportunities and Challenges for Hong Kong" and "The Development of Western Pearl River Delta and its Prospects of Cooperation with Hong Kong", and the reports of both studies were completed in the middle of last year. In November 2006, a seminar was organised by the Business Council, the Hong Kong Trade Development Council, major chambers of commerce of Hong Kong and the CCPIT Guangdong Sub-Council. Among the participants were representatives from the HKSAR Government and various sectors of Hong Kong as well as Mainland academics. They were invited to explore, from the perspectives of their respective sectors, what preparatory measures the governments and enterprises of the two places should take in face of the new challenges. More than 200 business representatives attended the seminar and engaged in lively discussion.

Exchanges with Mainland Academics and Organisations/Institutions in Hong Kong

Guangdong's 11th Five-year Plan and Hong Kong

At its meeting in June 2006, the Business Council invited Professor Feng Xiaoyun of Jinan University to give a briefing on Guangdong's developments under its 11th Five Year Plan, particularly on its infrastructure planning and the directions of economic developments in order for Hong Kong to grasp the province's developments and to prepare for the opportunities and challenges ahead.

Exchange with professional bodies, academic institutions and related organisations in Hong Kong

The Business Council's sub-groups held meetings and exchange sessions on issues of respective concerns with various organisations in Hong Kong, including professional bodies, universities, training institutions and chambers of commerce.



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	http://www.tid.gov.hk	enquiry@tid.gov.hk
投資推廣署 Invest Hong Kong	(1) http://www.investhk.gov.hk (2) http://www.thegprd.com.cn (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) enq@InvestHK.gov.hk (2) enq@InvestHK.gov.hk service@gddoftec.gov.cn
香港駐粵經濟貿易辦事處 The Hong Kong Economic and Trade Office in Guangdong	http://www.gdeto.gov.hk	general@gdeto.gov.hk

有關機構和商會 Related Organisations and Associations	網站 Website	電郵地址 E-mail Address
香港工業總會 Federation of Hong Kong Industries	http://www.fhki.org.hk	fhki@fhki.org.hk
香港中華出入口商會 Hong Kong Chinese Importers' and Exporters' Association	http://www.hkciea.org.hk	info@hkciea.org.hk
香港中華廠商聯合會 The Chinese Manufacturers' Association of Hong Kong	http://www.cma.org.hk	info@cma.org.hk
香港中華總商會 The Chinese General Chamber of Commerce	http://www.cgcc.org.hk	cgcc@cgcc.org.hk
香港旅遊發展局 Hong Kong Tourism Board	http://www.discoverhongkong.com	info@discoverhongkong.com
香港貿易發展局 Hong Kong Trade Development Council	http://tdctrade.com	hktcdc@tdc.org.hk
香港總商會 Hong Kong General Chamber of Commerce	http://www.chamber.org.hk	chamber@chamber.org.hk

