

# 主席報告

## CHAIRMAN'S STATEMENT







大珠三角商務委員會(商務委員會)經歷了不平凡的一屆。在任期內，金融海嘯席捲全球，對各國經濟體系均帶來不同程度的衝擊，對大珠三角地區當然也不例外。不過，政府、工商界和社會各界人士戮力一心，紛紛出謀獻策，令粵港經濟得以走出陰霾，攜手克服和渡過此一前所未有的難關。

過去一屆，對商務委員會而言，亦是別具意義。中國經濟改革開放三十年、中華人民共和國成立六十周年，這些重要的歷史里程碑象徵著中國走向新的發展階段，對香港乃至珠三角未來的發展方向皆有著深刻的啟示。

### 粵港合作的歷史發展軌跡

香港經濟發展到現今階段，主要受惠於背靠祖國和面向國際。回顧香港與廣東經濟發展的軌跡，歷史上，香港是轉口港，為內地、尤其珠三角地區提供進出口服務。然而，在1949至1979年間，受到禁運等因素影響，香港與內地割裂，無法進行融通內地與全球的貿易業務，遂另闢蹊徑，發展成為工業基地。

The past term of office has been an unusual one for the Greater Pearl River Delta Business Council (the Business Council). Within this term, we witnessed the financial tsunami sweeping the entire world and impacting the economies of different nations in different degrees. The Pearl River Delta (PRD) region was obviously not spared, but with the concerted efforts and inputs of the Government, the business sector and the community, the economies of Hong Kong and Guangdong have been able to emerge from the shadow of the financial crisis and ride out this unprecedented storm together.

The past term has also been particularly meaningful to the Business Council as the 30th anniversary of China's introduction of economic reform and opening-up policy and the 60th anniversary of the founding of the People's Republic of China both fall within this term of office. These important historic milestones signify a new era in China's development and give profound insight into the way forward for Hong Kong and PRD.

### The History of Hong Kong/Guangdong Cooperation Development

That Hong Kong's economy can develop to the level of today is attributable mainly to our ability to leverage the Mainland while engaging ourselves globally. Looking back at the course of economic development in Hong Kong and Guangdong, Hong Kong was historically an entrepot providing import and export services for the Mainland, in particular PRD. However, during the period between 1949 and 1979, Hong Kong was segregated from the Mainland under the influence of embargo and other factors and could no longer play the role of conduit for the Mainland's trading business with the rest of the world. Consequently, Hong Kong developed itself into an industrial base.

But from the 1970s onward, due to increasing land premium and labour cost, Hong Kong began to come under the competitive pressure from the other "three Asian tigers" and the ASEAN region. It was at this critical time that China launched its reform and opening-up policy, giving Hong Kong a new drive for development. The opportunities afforded by the reform and opening-up of the Mainland in 1978 have allowed Hong Kong and PRD to develop close ties. With the relocation of manufacturing activities to PRD, the "front shop,



不過，自1970年代，香港的地價及人工成本日漸高昂，開始面臨其他「三小龍」及東盟地區的競爭。在此關鍵時刻，內地改革開放正為香港帶來新的發展動力。把握1978年內地改革開放的契機，香港與珠三角得以緊密發展，製造活動遷往珠三角，「前店後廠」的分工格局逐步形成。此後，珠三角的工業迅速發展，成為全國最重要的出口基地，香港亦回歸傳統貿易角色，向珠三角工業提供高增值服務，並成為重要的國際金融中心、貿易和航運中心。

發展至今，粵港經濟合作已從以香港輕工業轉移而帶動的「前店後廠」模式，發展到目前以香港生產性服務業與廣東省先進製造業緊密合作的階段。此經濟結構優化過程不僅帶動兩地經濟持續增長三十年，其結果亦促進了整個國家的改革開放。

### 把握《規劃綱要》機遇加強服務業融合

目前，廣東服務業佔其經濟份額只有四成左右，香港則超過九成。廣東經過三十年的高速發展，深明若要不斷創新和創造更高的價值，則必須發展先進的生產性服務業，將廣東打造為全國的服務業中心、面向全國市場；對香港而言，面對各種資源和條件的制約，亦須以廣東作為廣闊的發展腹地 and 市場延伸空間。

“back factory” model of division of work between the two places gradually took shape. Since then, PRD's industrial development has grown exponentially, and the region has become the most important export base of the country. Meanwhile, Hong Kong has resumed its traditional trading role, providing high value-added services for industries in PRD, and also developed into a major international financial, trade and maritime centre.

After all these years of development, the economic cooperation between Hong Kong and Guangdong has evolved from the “front shop, back factory” model driven by the relocation of Hong Kong's light industries to the current mode of close cooperation between Hong Kong's producer services industries and Guangdong's advanced manufacturing industries. This process of optimisation of economic structure has not only brought about 30 years of continued economic growth in the two places, its success has also driven forward the reform and opening-up of the country.

### Leveraging the Opportunities Arising from the “Outline” to Strengthen Integration of Services Industries

At present, services industries account for only about 40% of Guangdong's economic share as compared with Hong Kong's figure of over 90%. After 30 years of rapid development, the Guangdong Government understands that the ability to keep innovating for higher values hinges on the development of advanced producer services industries and the transformation of Guangdong into a nationwide services industry centre catering for the entire domestic market. For Hong Kong, owing to its resources and conditional constraints, it needs to look to Guangdong for a wider hinterland for development and market expansion.







故此，我相信，粵港兩地在未來三十年將會在服務業加強融合，兩地經濟將走進新一輪以服務業為核心的合作階段。事實上，為促進和支持粵港服務業合作，國家和廣東近年相繼頒布一系列政策文件，其中，2009年初公布的《珠江三角洲地區改革發展規劃綱要(2008-2020年)》(下稱《規劃綱要》)正好為進一步的粵港合作打下強心針。

《規劃綱要》首次把粵港澳合作納入國家戰略，並賦予珠三角「先行先試」的發展空間和契機。在過去的合作基礎上，粵港社會各界應認清當前形勢，在互惠互利、平等共贏的大前提下，以更長遠眼光和更廣闊空間，發揮各自的優勢，實事求是地共同提升整個區域在世界經濟中的綜合競爭力。

### 全球經濟格局變化： 區域競合、重心轉向亞洲

事實上，全球的經濟格局正發生變化，區域競合已成為世界潮流，包括歐盟的建立和深化、東盟-中國自由貿易區已在2010年全面建成、兩岸三地關係愈趨密切、長三角和沿海地區的高速發展、中西部地區的崛起等。由此可見，未來將會是區域與區域之間的合作和競爭，個別的城市再難以單打獨鬥。不過，只要香港發揮好服務業的優勢，與珠三角融合成一個強大的經濟區域，前途仍然無可限量。

全球另一趨勢，是重心逐步轉向亞洲。亞洲地理形狀可比劃為一個大漏斗，粵港樞紐處於中間位置，漏斗上方是內地、日本、南韓，下方是東盟和印度，因此，對整個亞洲而言，粵港是溝通亞洲上下的橋樑，地位舉足輕重，我們只要居安思危，把握機會，不斷創新，香港的優勢絕不容易被取代。

基於上述趨勢，粵港加強合作、消除阻礙流通的壁壘障礙，有很大潛力發展成為真正的人流、物流、資金流和資訊流大樞紐。粵港融合，整體實力亦將大大增強，對香港、廣東，以至國家都可以帶來益處。

As such, I believe that integration between the services industries of Hong Kong and Guangdong will be on the rise in the next 30 years and the economies of both places will enter a new phase of cooperation centering upon services industries. Indeed, the Central and Guangdong Authorities have released a series of policy papers in recent years to facilitate and support Hong Kong/Guangdong cooperation in services industries. Among these, “the Outline of the Plan for the Reform and Development of Pearl River Delta (2008-2020)” (“Outline”) issued in early 2009 has been a booster for further cooperation between the two places.

The “Outline” has for the first time incorporated Hong Kong-Guangdong-Macao cooperation into the national strategy, endowing PRD with an opportunity for further developments under the “early and pilot implementation” arrangements. On the basis of past cooperation, the wider communities of Hong Kong and Guangdong should seek a clear understanding of the current situation. Under the preconditions of reciprocity, equality and mutual wins, both places should exercise their complementary strengths with a far-reaching foresight and wider vision to strengthen pragmatically the overall competitiveness of the whole region in the global economy.

### Changes in Global Economic Structure: Regional Coopetition and Shift of Attention towards Asia

It is a fact that the global economic structure is changing, and regional coopetition has become a worldwide trend. Examples are many, like the establishment of the European Union and its development, the establishment of the China-ASEAN Free Trade Zone in 2010, the closer relationship among the three places across the Taiwan Strait, the rapid development of the Yangtze River Delta and coastal regions, and the strong progress of China’s central and western regions. Foreseeably, regional cooperation and competition will become the norm, and it will be difficult for any individual city to compete on its own. That said, the future still holds unlimited possibilities for Hong Kong if it can leverage its strength in services industries and integrate with PRD into a strong economic region.

Another worldwide trend is the shift of attention towards Asia. Geographically, Asia looks like a large hourglass with Hong Kong and Guangdong located at the waist, China, Japan and South Korea being the upper bulb, and the ASEAN countries and India the lower bulb. Viewing the entire Asia in this light, Hong Kong and Guangdong are at a pivotal position that connects the upper and lower Asia. So as long as we remain vigilant, leveraging opportunities and breaking new ground, the strengths of Hong Kong can never be easily replaced.



## 商務委員會提建議冀促《規劃綱要》落實

在粵港融合的大趨勢下，商務委員會自2004年3月成立以來，一直致力促進香港與珠三角地區在經濟上更緊密合作。

為回應《規劃綱要》，商務委員會在2009年4月成立特別小組，圍繞產業和民生事務兩大範疇進行研究，並針對「硬軟基建對接，打通四流」、「制度創新，統一標準」、「簡化審批，降低准入門檻」、「謀求可持續發展，共建優質生活圈」、「整合社會服務資源，便利跨境生活」、「擴展教育和科技合作，提升整體人才質素」和「完善金融基建，防範金融風險」七個方面提出47項具體建議，藉此促進《規劃綱要》的具體落實。

粵港兩地政府正共同編制「共建優質生活圈」和「基礎設施建設」兩個專題合作規劃以及《粵港合作框架協議》，後者將會是粵港合作的綱領文件。商務委員會希望我們的建議能為粵港兩地政府提供參考，並能為國家現正制定的「十二·五」規劃，提供一定的背景意見。

With the above trend, Hong Kong and Guangdong will have great potential to develop into a colossal hub of human resources, goods, capital and information flows provided that the two places can step up cooperation and remove any barriers that obstruct the free flow of the above elements. Hong Kong/Guangdong integration will enhance our collective strength tremendously and bring benefits to Hong Kong, Guangdong and the country.


## Business Council's Recommendations Facilitating "Outline" Implementation

Following the mega-trend of Hong Kong/Guangdong integration, the Business Council has been endeavouring for closer economic cooperation between Hong Kong and PRD ever since its establishment in March 2004.

In response to the "Outline", the Business Council set up an ad hoc group in April 2009 to conduct studies on two major areas, namely industries and livelihood matters. With the objective of facilitating the implementation of the "Outline", the ad hoc group has put forward 47 specific recommendations under seven headings. These headings are "Coordinating Hard and Soft Infrastructures and Facilitating the Four Flows", "New Systems and Common Standards", "Streamlining Procedures and Lowering Entry Threshold", "Seeking Sustainable Development and Building a Quality Living Area", "Integrating Social Service Resources and Facilitating Cross-border Living", "Furthering







## 感謝各位對商務委員會的支持

在此，我謹代表商務委員會，衷心感謝各委員與事務主任盡心竭力為商務委員會服務。各委員高瞻遠足，不吝分享經驗，使商務委員會各項工作得以順利完成。我也要感謝大會秘書處人員不辭勞苦，擔當商務委員會的重要溝通橋樑。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的鼎力支持和鼓勵，共同促進粵港兩地經貿合作。



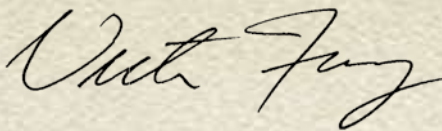
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馮國經

Collaboration in Education and Technology and Improving Overall Workforce Quality”, and “Optimising Financial Infrastructure and Preventing Financial Risks”.

The Hong Kong and Guangdong Governments are now jointly drafting two cooperative plans under the themes of “Building a Quality Living Area” and “Infrastructure Construction” and also the Framework Agreement on Hong Kong/Guangdong Cooperation. The latter will be the agenda for future Hong Kong/Guangdong cooperation. The Business Council hopes that the above-mentioned recommendations would serve as references for the governments of both places, and general views for Central Authorities in drawing up the National 12th Five-year Plan.

## Acknowledgements of the Support for the Business Council

On behalf of the Business Council, I wish to extend my heartfelt 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. Their contribution has brought the various tasks of the Business Council to successful completion. I would also like to thank the Secretariat for its hard work in serving as an important channel of communication for the Business Council. Finally, I wish to thank the HKSAR and Guangdong Governments, and the China Council for the Promotion of International Trade Guangdong Sub-Council for supporting and encouraging the work of the Business Council as well as fostering trade and economic cooperation between Hong Kong and Guangdong Province.



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