



大珠江三角洲概览

An overview of the Greater Pearl River Delta

大珠江三角洲的定义

大珠江三角洲(大珠三角)地区包括香港特别行政区、澳门特别行政区，以及广东省的珠江三角洲(珠三角)经济区。根据广东省的界定，珠三角经济区包括九个城市，分别是广州、深圳、东莞、佛山、江门、中山、珠海，以及惠州和肇庆的市区(大珠三角的11个管辖区和所占的土地面积见图表1和地图)。

Definition of the Greater Pearl River Delta

The GPRD includes the HKSAR, the Macao Special Administrative Region, and the PRD Economic Zone portion of Guangdong Province. The PRD Economic Zone, as specified by Guangdong Province, includes nine municipalities, namely Guangzhou, Shenzhen, Dongguan, Foshan, Jiangmen, Zhongshan, Zhuhai, and the urban areas of Huizhou and Zhaoqing (see Exhibit 1 and map below for the 11 jurisdictions of the Greater Pearl River Delta and their land area).

广东省及珠江三角洲经济区

Guangdong Province and the Pearl River Delta Economic Zone

资料来源：投资推广署(www.investhk.gov.hk)
Source: Invest HK (www.investhk.gov.hk)



注：图内橙色区域为珠江三角洲
Note: The area shaded orange denotes the Pearl River Delta

图表1：大珠江三角洲管辖区和土地面积

Exhibit 1: Jurisdictions of the Greater Pearl River Delta and their land area

香港 Hong Kong	珠江三角洲经济区 Pearl River Delta Economic Zone		澳门 Macao
	东莞 Dongguan	深圳 Shenzhen	
	佛山 Foshan	肇庆 Zhaoqing	
	广州 Guangzhou	中山 Zhongshan	
	惠州 Huizhou	珠海 Zhuhai	
	江门 Jiangmen		
1,100平方公里 sq km	41,698平方公里 sq km		26平方公里 sq km

大珠江三角洲的主要管辖区

Main Jurisdictions in the Greater Pearl River Delta Region



资料来源：投资推广署(www.investhk.gov.hk)
Source: Invest HK (www.investhk.gov.hk)

大珠三角的发展

二十多年前，广东省珠三角大部分地区尚未发展。珠三角早期以务农为主，直到国家在七十年代末推行改革开放政策，才成为全球发展最快的地区之一。

八十年代初，邻近港澳的深圳和珠海成为经济特区，以特设的规定和税制吸引外资，促使不少港商把工厂迁往邻近的深圳特区以及珠三角其他地区，借助内地低廉的土地、工资和营运成本生产。劳工密集的工业北移至珠三角，而高增值的服务如管理、金融、物流、设计、科研、品质保证等行业则留港发展。

Development of the GPRD

Some twenty years ago, the PRD in Guangdong Province was largely undeveloped and largely engaged in agricultural activities. It was not until the introduction of the open-door policy and economic reforms in the late 1970s that the region has transformed into one of the fastest-growing areas in the world.

In the early 1980s, the areas next to Hong Kong and Macao became the Special Economic Zones (SEZs) of Shenzhen and Zhuhai respectively. These SEZs had special regulations and taxation to attract foreign investments. Hence, many Hong Kong manufacturers moved into the Shenzhen SEZ nearby as well as other parts of the PRD to take advantage of cheaper land, labour and operating costs. Whilst labour-intensive activities shifted to the PRD, higher value-added activities, such as management, finance, logistics, design, R&D, quality assurance etc. remained in Hong Kong.

珠三角的经济结构近年出现了新一轮的转变，由从前以制造业为主的，逐渐发展为知识型的经济体系。广东省一直积极拓展服务业，发展较高增值的服务。另一方面，又增加汽车制造、石油化工及设备制造等高增长和具有长增值链的高科技产业及重工业的比重。因此，珠三角正转型为生产力高、科研发展力强的经济重镇。

香港在金融、管理、会计、法律服务、产品设计、品牌创造、分销管理、市场推广和公共关系上的优势，结合珠三角在制造和科研发展方面的实力，使大珠三角成为实力雄厚的经济地区。

珠三角的国内生产总值由1980年的稍低于120亿元人民币(14.5亿美元)，上升至2003年的11,340多亿元人民币(1,370亿美元)(见图表2：珠江三角洲主要经济指标)。期间，珠三角的国内生产总值每年平均增长21.9%，增幅远较广东省(13.6%)和全国(9.6%)为高。2003年，珠三角的人均国内生产总值为39,782元人民币(4,806美元)，是广东省的2.3倍，全国的4.36倍。在珠三角地区，以广州、深圳、佛山和东莞这几个城市的发展最为蓬勃；2003年，这些城市的人均国内生产总值都超过4万元人民币(4,833美元)(图表3)。

珠三角是广东省的经济中心，虽然土地面积只占全省的25%，但2003年的国内生产总值却占全省的83.2%。此外，珠三角已逐渐成为一个具有吸引力的消费市场。过去二十多年，珠三角消费品的零售额由1980年的70.7亿元人民币(8.5亿美元)，激增至2003年的3,976.6亿元人民币(480.4亿美元)。2003年的消费品零售额较一年前增加11.8%，占全省总零售额的70%以上。

In recent years, a new wave of transformation of the PRD's economic structure - from one that has been predominantly manufacturing-based to one that is gradually becoming knowledge-based - has taken place. Guangdong Province has been keen in developing its service capabilities and diversifying into higher value-added services. Meanwhile, it has increased the proportion of high-tech and heavy industries such as automobiles, petrochemicals and equipment manufacturing industries, which feature high growth and long production industry value chains. Hence, the PRD is transforming into a dynamic place with high levels of productivity and considerable scientific R&D capabilities.

It is the combination of Hong Kong's strengths in financing, management, accounting, legal service, product design, branding, distribution management, marketing and public relations with the PRD's abilities in production and R&D research that has enabled the GPRD to emerge as an economic powerhouse.

The GDP of the PRD grew from just below 12 billion yuan (US\$1.45 billion) in 1980 to over 1,134 billion yuan (US\$ 137 billion) in 2003 (see Exhibit 2 for a summary of the major economic indicators of the PRD). During the period, the average annual growth rate of GDP in the PRD was 21.9%, well above that of Guangdong Province (13.6%) and the country as a whole (9.6%). The per capita GDP of the PRD amounted to 39,782 yuan (US\$ 4,806) in 2003, which is 2.3 times that of Guangdong Province and 4.36 times that of the whole country. Within the PRD region, Guangzhou, Shenzhen, Foshan and Dongguan are the most prosperous cities, and the per capita GDP of each of them was over 40,000 yuan (US\$4,833) in 2003 (Exhibit 3).

The PRD is the economic hub of Guangdong province. It accounted for 25% of Guangdong's land area but contributed to 83.2% of the province's GDP in 2003. Moreover, the PRD has increasingly become an attractive consumer marketplace. Over the past two decades, the retail sales of consumer goods in the PRD increased dramatically from 7.07 billion yuan (US\$ 0.85 billion) in 1980 to 397.66 billion yuan (US\$ 48.04 billion) in 2003. In 2003, the retail sales of consumer goods grew by 11.8% year-on-year, and accounted for over 70% of the provincial total.

图表2：珠江三角洲的主要经济指标(按当时价格计算)

Exhibit 2: Pearl River Delta Region Major Economic Indicators (at current prices)

指标 Indicator	1980	1985	1990	1995	2000	2001	2002	2003
登记人口(百万人) (注) Registered population (million persons) (Note)	16.27	17.57	19.28	21.38	23.07	23.37	23.65	23.99
国内生产总值(亿元人民币) Gross domestic product (billion yuan)	119.2	303.9	872.2	3,899.7	7,378.6	8,363.9	9,418.8	11,341.1
第一产业(亿元人民币) Primary industry (billion yuan)	30.7	57.3	129.4	314.9	428.5	445.2	465.0	470.5
第二产业(亿元人民币) Secondary industry (billion yuan)	54.0	148.7	404.6	1,957.1	3,657.3	4,139.0	4,688.1	5,939.6
第三产业(亿元人民币) Tertiary industry (billion yuan)	34.5	97.9	338.2	1,627.7	3,292.9	3,779.8	4,265.6	4,930.0
固定资产投资总额(亿元人民币) Total amount of investment in fixed assets (billion yuan)	16.6	128.4	231.4	1,491.0	2,291.6	2,566.8	2,886.6	3,739.7
消费品零售总额(亿元人民币) Total amount of retail sales of consumer goods (billion yuan)	70.7	198.0	445.7	1,544.7	2,781.4	3,120.1	3,481.3	3,976.6
出口总额(亿美元) Total amount of exports (US\$ billion)	6.2	16.3	81.4	461.1	847.4	908.3	126.1	1,450.6
实际利用的外资(亿美元) Amount of foreign capital actually utilized (US\$ billion)	1.0	7.4	15.4	85.8	125.4	141.9	150.2	170.3
政府收入(亿元人民币) Government revenue (billion yuan)	23.4	49.9	95.9	315.3	599.1	745.7	768.7	878.0
政府支出(亿元人民币) Government expenditure (billion yuan)	8.2	26.1	76.4	316.6	685.4	822.7	963.6	1,075.0
城乡居民年终储蓄存款(亿元人民币) Savings deposits by urban and rural residents at year-end (billion yuan)	21.0	112.0	552.7	2,810.4	6,641.0	7,670.6	9,240.2	11,068.9

资料来源：广东省统计局和 2001年、2002年、2003年及2004年的《广东统计年鉴》。

Sources: Guangdong Provincial Statistics Bureau, and Guangdong Statistical Yearbook 2001, 2002, 2003, 2004.

注：根据2000年进行的全国人口普查，珠三角经济区共有人口4 080万，与官方的登记人口数字有出入。两者出现差异的主要原因，是前者计算了外来人口和流动人口，而后者则没有把这两类人口计算在内。由于前往珠三角就业者人数众多，但却没有正式的‘登记’户籍，所以珠三角在这方面的人口差异较中国其他地区为大。

Note: 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.

图表3：2003年珠三角主要城市居民的生活水平

Exhibit 3: Living standard of local residents in major cities of the PRD in 2003

主要城市 Major City	国内生产总值 GDP (百万元人民币) (million yuan) (逐年增长率) (yoy growth)	人均国内生产总值 Per capita GDP (百万元人民币) (million yuan) (逐年增长率) (yoy growth)	消费品零售总额 Total Retail Sales of Consumer Goods (百万元人民币) (million yuan) (逐年增长率) (yoy growth)
广州 Guangzhou	349,687.87 (15.2%)	48,372 (14.2%)	149,427 (9.02%)
深圳 Shenzhen	289,540.70 (19.2%)	54,545 (9.3%)	80,177 (16.27%)
珠海 Zhuhai	47,327.42 (17.5%)	37,675 (16.3%)	15,918 (10.95%)
佛山 Foshan	138,159.51 (16.1%)	40,444 (14.7%)	47,319 (12.72%)
江门 Jiangmen	73,008.25 (11.1%)	19,131 (10.9%)	27,784 (11.86%)
东莞 Dongguan	94,796.54 (19.5%)	60,158 (17.6%)	33,800 (50.26%)
中山 Zhongshan	50,140.43 (18.6%)	28,645 (16.4%)	15,361 (14.35%)
惠州 Huizhou	59,097.72 (13.9%)	20,759 (12.7%)	18,167 (12.84%)
肇庆 Zhaoqing	46,639.14 (11.4%)	11,907 (10.9%)	17,120 (10.72%)

资料来源：《广东统计年鉴—2004》

Source: Guangdong Statistical Yearbook 2004

大珠江三角洲的竞争力

香港和珠三角在经济上互动互补，带动了大珠江三角洲地区发展各式各样具国际竞争力的工业和产业群。大珠江三角洲不仅是各种资源、物料和资本货物的重要工业市场，也是运输及贸易服务的主要市场。

(1) 制造业

大珠江三角洲在国际轻工业和科技制造业的市场上甚具竞争力，也许可以说已成为全球最重要的轻工业制品中心，以及全球高科技电子产品的主要装配点之一。大珠江三角洲在这些工业上具备的主要优势包括：低廉的土地和工资、高效率的劳工、妥善的基础设施、日益进步的技术，以及政府的政策支持。此外，这些产业亦借助本港的投资、管理、市场知识、科技和国际联系拓展业务。

Competitiveness of the GPRD

The economic interaction between Hong Kong and the PRD has fostered the development of a range of internationally competitive industries and clusters in the GPRD. The region is important as an industrial market for all sorts of inputs, materials, and capital goods. It is also a major market for transportation and trade-related services.

(1) Manufacturing industries

The GPRD has achieved a high level of international competitiveness in light manufacturing and technology-based manufacturing. The region has become perhaps the world's leading centre for a wide range of light-manufactured goods and one of the leading locations for assembling manufacturing of high-tech electronics products. The region's greatest strengths in these industries include low land and labour cost, productive workforce, reasonable infrastructure, improving technical skills, and a supportive policy regime. The industries also benefit from the investment, management, market knowledge, technology, and international connections obtained through Hong Kong.

(2) 运输服务

大珠三角地区的运输服务主要由国际贸易带动。大珠三角是全球主要的制造业和出口基地之一，而且地位日益重要，因而成为全球海空货运服务的最大市场之一。一直以来，本港拥有全球最繁忙的货柜港和国际航空货运机场。最近，珠三角(特别是深圳和广州)的港口和机场发展非常迅速，为付运人提供更多的货运容量和选择，也为区内的运输服务带来发展动力。

(3) 贸易和商业服务

大珠三角的出口量在过去二十多年大幅增长，使区内的贸易、采购、货运代理、物流、贸易融资、法律及其他相关服务的需求上升。香港是国际贸易和金融中心，具备发展完善的服务业，吸引大量跨国企业的采购部门，以及物流、资讯和其他贸易服务公司进驻香港。类似服务亦在珠三角发展，数量与日俱增。时至今日，大珠三角已经成为内地贸易服务的主要中心。

至于商业服务方面，香港资金自由流动、有效率的规管制度，又汇聚世界各地的技术专业人才，足以提供大量的专业和商业服务，供应大珠三角的庞大需求。

(4) 产业羣

大珠三角发展的一个明显特徵是涌现了一大批各行各业的产业羣，如制衣和纺织、鞋履、塑胶制品、电器、电子、印刷、运输、物流、金融服务等。这些产业羣大多分布在范围较小的地方(图表4显示各行各业往往集中在珠三角的某些城市和乡镇)。

产业羣已经成为大珠三角的主要竞争优势。在产业羣中，企业可共用相关的生产资源、具有专门技能的劳工、分销和讯息渠道，以及联系网络等，从而

(2) Transportation services

Transportation services in the GPRD region are driven largely by international trade. Given the growing prominence of the GPRD as one of the world's leading manufacturing and export bases, the region has become one of the largest markets for sea and air cargo services in the world. Hong Kong has long been the world's busiest container port and airport for international airfreight. Recently, the ports and airports in the PRD, particularly those in Shenzhen and Guangzhou are developing very fast. This provides shippers with additional capacity and additional choice, as well as impetus for development of transportation services in the region.

(3) Trade-related and business services

The massive export surge of the GPRD region over the last two decades has increased demand for trading, sourcing, freight-forwarding, logistics, trade finance, legal, and other related services in the region. Hong Kong being an international trade and finance centre, with a well-developed service industry, has become a magnet to the buying and sourcing offices of multinational enterprises, as well as to logistical, information, and other services related to trade. Increasingly, similar services are developing in the PRD. Hence, the GPRD has become a major centre for trade-related services in the Mainland.

As for business services, Hong Kong's free flows of capital, efficient regulatory system and skilled professionals from all over the world have greatly contributed to a good supply of professional and business services to meet the enormous demand for such services in the GPRD.

(4) Industrial clusters

A distinctive feature of the development of the GPRD is the emergence of a broad range of clusters in various industries such as garments and textiles, footwear, plastic products, electrical goods, electronics, printing, transportation, logistics, financial services, etc. Many of these clusters can be found in relatively small geographic areas. (Exhibit 4 shows a wide range of industries in which there is a strong geographic concentration in individual cities or towns in the PRD).

Industrial cluster has become a major source of the GPRD's competitiveness - enterprises within a cluster can enjoy economies of scale from sharing related production inputs, specialized labour pools, distribution and communication channels, and also networking. Moreover, such clustering can also spur competition, which encourages information, knowledge and technology transfer among related

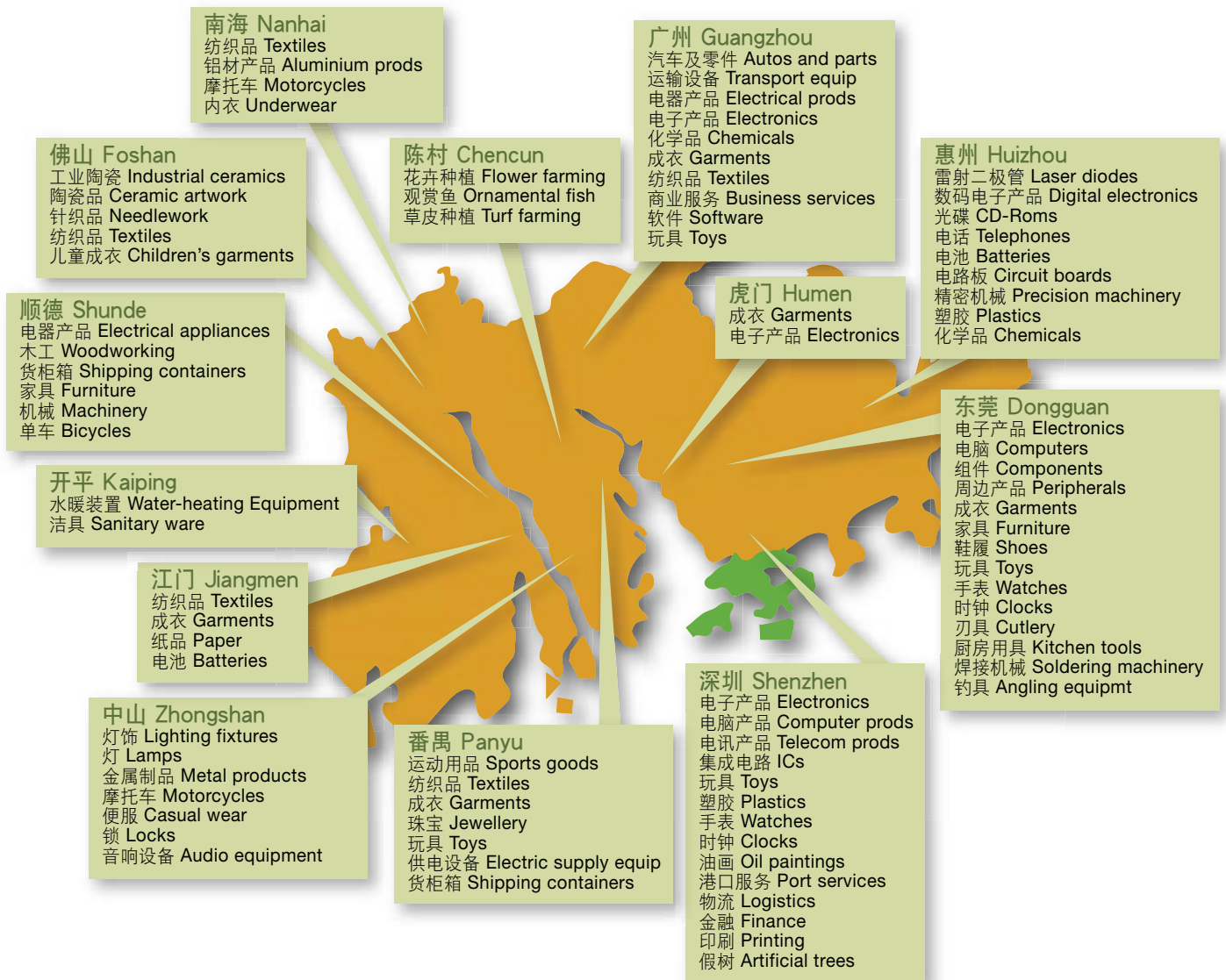
受惠于规模经济效益。此外，这些产业羣亦可推动竞争，促进相关企业互通资讯、知识和技术。这种知识与技术的转移有助发展新的产业，从而带动产业羣的整体发展。

产业羣是地区经济的重要一环，大珠三角的经济一直受惠于各地区产业羣的稳步发展。

enterprises within the cluster. Such type of knowledge and technology transfer may lead to new industry growth, thereby helping to drive the overall growth of the cluster.

Industrial cluster is an integral part of the regional economy. The GPRD economy has been benefiting from the steady growth of the local clusters.

图表4：珠三角的地区工业
Exhibit 4: Localised Industries in the Pearl River Delta Region



资料来源：《香港与珠江三角洲：经济互动》，恩莱特等著，2003年
Source: "Hong Kong and the Pearl River Delta: the Economic Interaction", M. Enright et al., 2003.

近期影响大珠三角发展的措施

(1) 世贸和CEPA

国家持续进行经济自由化和改革开放，对大珠三角的经济带来重要影响。2001年国家加入世界贸易组织(世贸)，2003年签署《内地与香港关于更紧密经贸关系的安排》(CEPA)，以及多项促进粤港经济合作的政策措施，均有助增强大珠三角的经济增长。

根据世贸协议，中国须逐步开放服务业市场。不少跨国企业将会把握这个机会，开拓庞大的中国市场。由于珠三角毗邻以香港为基地的世界级服务机构，因此会大大受惠。

在CEPA框架下，预期大珠三角会通过货物和服务贸易、投资便利化和旅游业，加速融合。CEPA准许香港多个服务界别以先于内地对世贸订下的开放时间表进入内地市场，使以香港为基地的企业可以早着先机，赴内地发展。

(2) 泛珠三角区域合作

2003年8月，广东省政府提出泛珠三角区域合作的构思。泛珠三角包罗九个省份，再加上香港和澳门两个特别行政区¹。整个地区的面积占全国面积的五分之一，人口超过全国的三分之一，国内生产总值合计达到52,145亿元人民币(6,300亿美元)。

今天，国际间的竞争已不再局限于一个城市，而是以区域为单位，同时，每个经济区亦必须拥有独特的优势(“核心”)和腹地。泛珠三角区域合作成功，将可大大增强区内的经济实力、地位和影响力，并有助达致区域协调发展的目标。香港和广东是区内经济最发达的两个地方，当可携手合作，戮力开拓和利用这个巨大经济区域的潜力和机遇。

¹ 泛珠三角由广东、福建、湖南、广西、海南、四川、贵州、江西和云南九个省份，再加上香港和澳门两个特别行政区组成，又称为“9+2”。

Recent initiatives shaping the development of the GPRD

(1) WTO and CEPA

China's continuing process of economic liberalisation and opening will have an important influence on the economies of the GPRD. China's accession to the WTO in 2001, the signing of CEPA between the Mainland and Hong Kong in 2003, and the various policy initiatives to enhance economic cooperation between Guangdong and Hong Kong have helped strengthen economic growth of the GPRD.

Under WTO's agreement, China has to gradually open up its service sector to the world. Many multinational enterprises will make use of this opportunity to tap the huge Chinese market. In this connection, the PRD, with its proximity to world-class service providers based in Hong Kong, shall be a strong beneficiary.

With CEPA, the GPRD is expected to integrate even faster through trade in goods and services, investment facilitation and tourism. In many service sectors, CEPA is lowering barriers of entry into the Mainland for Hong Kong service providers before China's WTO commitments take effect, allowing enterprises based in Hong Kong an early mover advantage.

(2) Pan-PRD cooperation

The concept of Pan-Pearl River Delta (Pan-PRD) regional cooperation was proposed by the Guangdong Government in August 2003. The Pan-PRD region comprises nine provinces and the Hong Kong and Macao Special Administrative Regions¹. The region makes up one-fifth of China's landmass, contains more than one-third of its population and a combined GDP of \$5,214.5 billion yuan (US\$630 billion).

Nowadays, international competition is no longer on a city basis, but rather on a regional basis, and that each economic region possesses unique strengths ('core') and a hinterland. A successful Pan-PRD regional collaboration will give a huge boost to the economic strength, status and influence of the region concerned and help realise the objective of coordinated regional development. Hence, Hong Kong and Guangdong, being the two most developed economies in the region, must together play a very critical role in exploring and utilising the potentials of and opportunities brought by this growing regional giant.

¹ The Pan-PRD region is made up of nine provinces including Guangdong, Fujian, Hunan, Guangxi, Hainan, Sichuan, Guizhou, Jiangxi and Yunnan as well as Hong Kong and Macao special administrative regions. The region is also known as "9+2".

(3) 改善运输基建

为了促进大珠三角的合作，我们必需发展一系列运输基建和相关设施，以配合随着区内贸易投资大幅增长而激增的需求。最近，粤港两地正不断推动多项跨界基建的发展。举例来说，港珠澳大桥的前期规划工作进展良好，三方已就大桥的定线和落脚点达成共识。此外，两地政府正进行广深港高速铁路的前期工作，并正全力兴建深港西部通道，以期在2006年下半年前落成启用。在泛珠三角区域进行类似的合作，对进一步促进区内的融合至为重要。

大珠三角面临的挑战

大珠三角地区诚然拥有庞大的潜力，具备实力成为全球最有活力的地区之一，但前路并非毫无障碍，仍有不少问题和挑战足以左右未来的发展。事实上，很多挑战都是区内急速发展所致。发展迅速对珠三角的基建、环境、能源和其他公共服务造成压力，其中环境恶化等问题已在粤港两地引起很大的关注。

此外，大珠三角正面对内地其他地区的激烈竞争。十多年前，长江三角洲（长三角）的经济发展落后于珠三角，但现已急起直追，成为推动内地经济发展的另一个重要动力源头。长三角近年的出口增长更超越珠三角。另一方面，华北的环渤海地区亦正在冒起，将在内地的经济发展方面担当重要的角色。

事实上，大珠三角面对种种挑战和问题，将会促使区内各地更加紧密合作。总而言之，大珠三角端赖区内各政府和私人机构紧密合作，才能持续兴旺发展。

(3) Improvement in transport infrastructure

To facilitate GPRD cooperation, it is important to develop a range of transport infrastructure and related facilities to keep pace with the surging needs resulting from substantial growth of trade and investment in the region. Recently, the Hong Kong and Guangdong authorities have been making progresses concerning cross-boundary infrastructure developments. For example, the advanced planning work of the proposed bridge linking Hong Kong, Zhuhai and Macao has been progressing well, with consensus reached on the alignment and landing sites. They are also taking forward the preparatory work of the Guangzhou-Shenzhen-HK Express Rail Link and working at full steam on the construction of HK-Shenzhen Western Corridor with the objective of ensuring its opening by the second half of 2006. Similar cooperation in the Pan-PRD region would be important to facilitate better regional integration.

Challenges faced by the GPRD

There is no doubt that there is enormous potential for the GPRD region to extend its position as one of the most dynamic regions in the world. Yet the region is not growing without challenge – the region is facing a number of issues and challenges that can influence its future development. In fact, many of these challenges stem from the rapid growth of the region. The rapid pace of development has placed great strains on the infrastructure, environment, energy and other public services in the PRD. Some issues, for instance, the problem of environmental degradation, have become a major concern for both Hong Kong and Guangdong.

Besides, the GPRD is facing strong competition from other regions in China. The Yangtze River Delta (YRD), whose economy lagged behind the PRD some ten years ago, is surging as another major economic engine of China. The YRD's export growth recently overtook that of the PRD. The Bohai Rim in Northern China is also going to play a key role in economic development.

Indeed, the challenges and issues that the GPRD faces would provide incentive for different parts of the region to work together even more closely. All in all, it is through close cooperation between governments and private sector in the region that the GPRD can continue to prosper in the future.