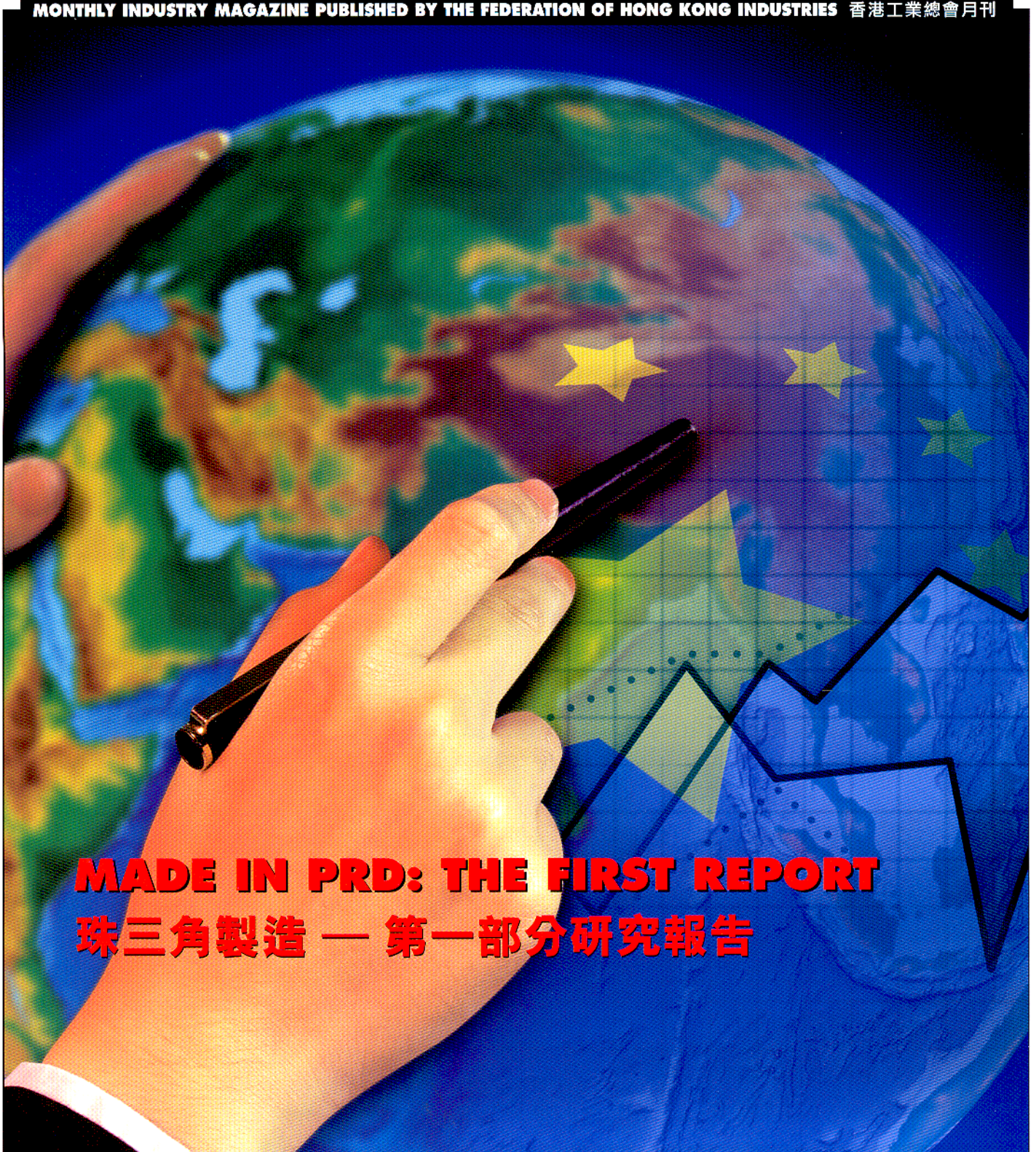


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MADE IN PRD: THE FIRST REPORT

珠三角製造 — 第一部分研究報告

From the director-general...

THE FIRST REPORT

The Federation recently released Part I of its study *Made in PRD — The Changing Face of Hong Kong Manufacturers*. *Made in PRD* is a survey of Hong Kong manufacturing and trading firms economically active in China's Pearl River Delta (PRD) region — easily one of the largest manufacturing centres in the world.

The report comprises of two parts, we expect Part II will conclude with the production of the final report in the first half of 2003; the findings of Part I feature as our cover story this month. They provide a good overview of the activities of Hong Kong manufacturers in the PRD, and clearly highlight the strong presence of Hong Kong companies in this region.

The project was the focus of the Federa-

tion's research work throughout last year. We hope our findings lay the foundations for more focused studies on the economic integration of Hong Kong and the PRD, as well as give the Hong Kong Government, industry support bodies and the business community some new insights.

V C Davies



V C Davies
Director-general of the
Federation
總幹事戴慧琪

總幹事說...

首份報告公布了

工總最近公布了《珠三角製造——香港製造業的蛻變》研究報告的第一部分。《珠三角製造》是一個關於在中國珠江三角洲地區(無疑是世界最大的製造業中心之一)有活躍商業活動的香港製造業公司和貿易公司的調查研究項目。

報告包含兩個部分。我們預期當最後報告在二〇〇三年上半年撰寫完成後，將會出版最後的總結報告。研究報告第一部分的主要內容已載入本月號的封面專題報道中。它描繪出香港廠商在珠三角活動的全

貌，清楚說明香港製造業在這個地區規模龐大。

這個研究項目是工總去年研究工作的重點。我們希望這項研究的結果能為關於香港與珠三角經濟融合的更專門研究奠定基礎，並為特區政府、工業支援機構和商界提供一些新的啟示。

戴慧琪

Since the 1980s, the majority of Hong Kong manufacturers have relocated their production lines to the Pearl River Delta (PRD) region. This move has allowed them to reduce their production costs, and Hong Kong's manufacturing industry to grow rapidly and maintain its competitive edge in the global market.

The relocation process has helped the service and financial sector to develop and prosper in Hong Kong. Although it is widely recognised that the rapid growth of this sector can be attributed to the increase in demand for support services by local manufacturing companies with expanded PRD operations, previously there had never been a systematic study to gauge the correlation between the two regions.

"Clearly there was a need to get more comprehensive research based statistics on the size, scale and nature of activities of Hong Kong firms operating in the PRD to help the business community to strategically develop," says Victor Lo, chairman of the Federation of Hong Kong Industries.

"In response, the Federation set out on a project to study the economic relationship between Hong Kong and the PRD region. The project commenced in April last year and we named it *Made in PRD—The Changing Face of Hong Kong Manufacturers*," he says.

The objective of the study is to determine the scale and nature of the manufacturing activities of Hong Kong based manufacturing and trading (HKM&T) firms in the PRD region. It also sets out to identify which technological, institutional and logistical infrastructures are required to better support the offshore production of these Hong Kong manufacturers and to assess the opportuni-

ties and challenges facing them.

Made in PRD comprises of two parts: Part I and Part II. The findings of Part I are detailed within this article. Part II of the study commenced in November 2002 and will be completed with the publication of the final report in the first half of this year.

The findings from Part I have been concluded from questionnaires that were sent out in April 2002 to approximately 120 thousand HKM&T firms to estimate the scale and scope of manufacturing activities in the PRD.*



Federation chairman Victor Lo (middle) with Prof Richard Wong (left) and director-general V C Davies at the press conference announcing the Part I survey findings.

工業總會主席羅仲榮(中)、王于漸教授(左)和總幹事戴慧琪在記者會中宣布第一部分研究報告的結果。

The research team of the Hong Kong Centre for Economic Research, led by Professor Richard Wong, collated and analysed the data from the returned questionnaires between April and May 2002.

"The data allowed the extent of HKM&T companies' investments in and co-operation with the PRD region to be gauged. It also provided important insights into what form these Hong Kong companies had invested in the PRD, what sectors, the size of their operations, and whether they produce goods for export and/or for the domestic mainland market," explains Prof Wong.

* The population of the survey was the full list of Hong Kong registered firms classified as manufacturing firms (codes: 311-391) and importing/exporting firms (codes: 631-632) by the Census and Statistics Department in December 2001. These firms are referred as HKM&T firms in the Report.

The questionnaire was test piloted before being sent to all manufacturing and trading firms. The target survey population was all firms in Hong Kong classified as either manufacturing or trading companies by the Census and Statistics Department of the HKSAR Government (these companies are referred as "HKM&T" firms and include foreign owned companies). There were 122,809 such establishments at the time of survey in Hong Kong.

In total, the sample consisted of 2,597 records.

"Trading firms account for 70 per cent of the sample, and are thus underrepresented in the sample, as 84 per cent of the establishments in our target population are trading firms," says Prof Wong.

The overall response rate was 2.1 per cent. The response rates for manufacturing and trading firms were 4.1 per cent and 1.7 per

cent respectively. "The different response rate implies that our sample is not a simple random sample. "In our analysis of the sample data, we have taken steps to deal with this by treating the sample as consisting of 96 strata (6X16), with each stratum representing an employment size class within a sector," explains Prof Wong.

SURVEY FINDINGS

The survey findings confirm that Guangdong Province is the most important production base for Hong Kong's manufacturing operations, most of which are concentrated in the PRD region.

"The findings of the survey estimated that as of December 2001, more than half (63,000 or 52 per cent) of the 122,809 HKM&T firms had economic activities in the Mainland," says Mr. Lo.

"Since our study focuses on manufacturing operations of these HKM&T firms in the Mainland, a firm is defined to be economically active in the Mainland if it is engaged in any of the following three activities: investing in factory facilities in the Mainland; having management and operation control of factory facilities; or making sub-contracting processing arrangements with foreign invested or local enterprises in the Mainland,"

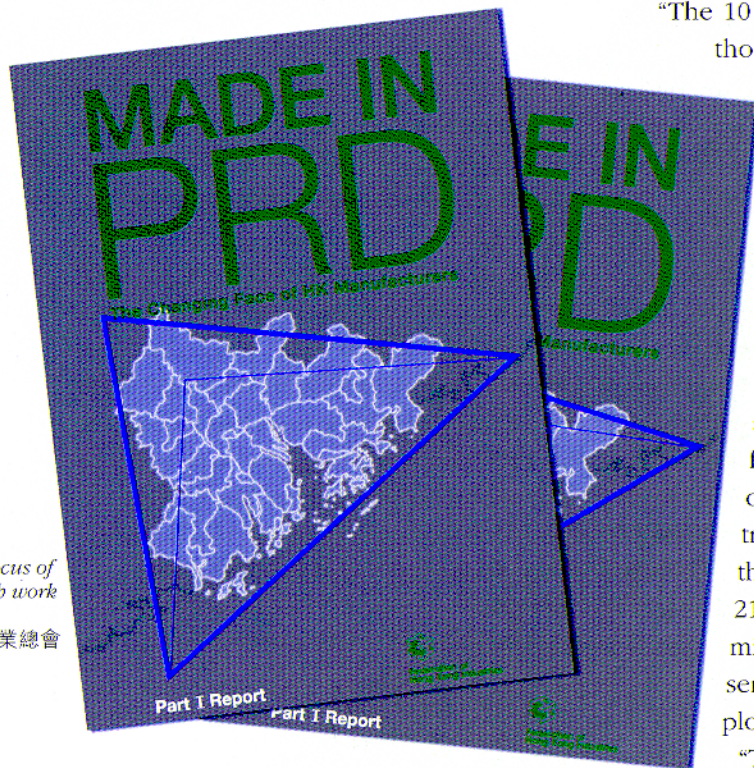
says Prof Wong.

The survey estimated that 59,000 factories and 11 million workers in the Mainland supported the manufacturing activities of these 63,000 firms. Out of these 59,000 factories, 53,000 (employing 10 million workers) were estimated to be in Guangdong, a high percentage of which were concentrated in Dongguan, Shenzhen and Guangzhou.

"The 10 million in Guangdong included those employed by foreign companies registered in Hong Kong," explains Mr Lo. According to the Federation's own estimation, companies of Hong Kong capital would employ 7-8 million people.

These factories were mainly categorised as foreign funded enterprises (FFE) and those operated under other contractual forms (OCFs), such as three forms of processing and compensatory trade. The survey estimated that of the 53,000 factories in Guangdong, 21,000 were FFEs, employing 4.75 million workers. The rest (32,000) served HKM&T firms in OCFs, employing about 5.59 million workers.

"This is the first time a serious effort



Made in PRD was the focus of the Federation's research work last year. 《珠三角製造》是香港工業總會去年的重點研究項目。

has been made to estimate how many people are employed under OCF arrangements," notes Mr Lo.

The survey found that 35 per cent of manufacturing firms and 55 per cent of trading firms have economic activities in the Mainland. Prof Wong explains that superficially the finding that more trading firms had economic activities in the Mainland than manufacturers may appear to be surprising.

"In fact, this finding implies that many firms that are classified by the Census & Statistics Department as traders are actually manufacturers. They are called traders because their production facilities are no longer in Hong Kong; they are in the Mainland. This shows that the contribution of manufacturing to Hong Kong's economy

tured in Mainland factories for HKM&T firms, the survey estimated that as of December 2001, about 71 per cent of the output of these firms was exported, 19 per cent was transferred to other facilities for further processing, and only 10 per cent was for domestic sales. "It was estimated that on average, 87 per cent of these firms used Hong Kong Port to export their products made in the Mainland to the world market," says Mr Lo.

Regarding raw materials, on average, half of the raw materials used by Mainland factories with a connection to HKM&T firms were imported, 17 per cent were transferred from other factories in the Mainland and 33 per cent were attained from domestic suppliers. Of those firms that imported raw materials,

78 per cent imported through Hong Kong.

"The survey highlights that although many Hong Kong companies carry out their manufacturing activities in the PRD, the usage of Hong Kong Port has remained significant with output and raw materials being transported via Hong Kong. Our container terminals, together with related logistics and transportation sectors, have continued to pro-



It was estimated that the 63,000 HKM&T firms that were economically active in the Mainland employed a total of 477,000 people in Hong Kong.

takes many different forms, and might help correct the common misperception that the contribution of manufacturing to Hong Kong's economy is rapidly declining," he says.

Although many HKM&T firms have exported their manufacturing investment to the Mainland, the survey findings indicate that they still make a significant contribution to employment in Hong Kong. It was estimated that the 63,000 HKM&T firms that were economically active in the Mainland employed a total of 477,000 people in Hong Kong.

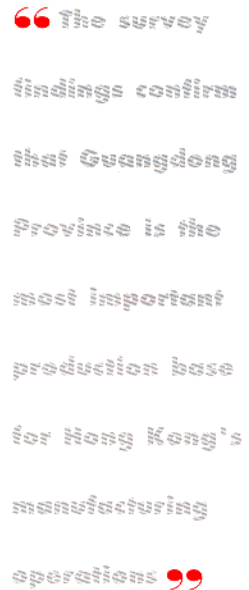
As for the movement of products manufac-

Kong people," says Mr Lo.

He emphasises that in order to facilitate a more efficient flow of merchandise between Hong Kong and the PRD, it is imperative that our terminal operators continue to improve efficiency and upgrade their service levels; the SAR Government should also speed up the development of Hong Kong's logistics infrastructure.

USEFUL FINDINGS

The findings of Part I have been used by the Hong Kong Centre for Economic Research to design a more intensive





The survey found that although many Hong Kong companies carry out their manufacturing activities in the PRD, the usage of Hong Kong's port has remained significant with output and raw materials being transported via Hong Kong.

這次研究調查發現，雖然有許多香港公司在珠三角從事製造業活動，香港口岸作用依然甚大，因為不少產品出口和原材料進口是經香港進行的。

questionnaire. In November 2002, the questionnaire was sent to companies with economic activities in the PRD.

Mr Lo says *Made in PRD* has and continues to be the focus of Federation research work. "I am mindful that the project would not have been possible without the generous support of the Innovation and Technology Fund and 31

sponsor organisations," he says.

Aside from businesses themselves, the findings will help the Hong Kong Government and industry-support bodies to define the development needs of manufacturers, in particular for the technological advancement of Hong Kong's manufacturing industry.

"By making reference to the prevailing R&D capabilities of Hong Kong manufacturing companies and the growing economic ties between Hong

Kong and the PRD, policy makers will be able to use the project's deliverables when formulating the strategic direction of Hong Kong's technological and economic development," says Mr Lo.

"I am sure they'll find the report makes interesting reading and highlights how economically active Hong Kong companies are in this region," he concludes.



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「工廠北移又助長了
香港金融業和服務業
的蓬勃發展。」

珠三角製造 — 第一部分研究報告

去年四月，香港工業總會的研究項目《珠三角製造 — 香港製造業的蛻變》開展。最近，項目發表了第一部分研究報告，內容有以所有香港製造商和貿易商為對象的問卷調查結果。

自一九八〇年代以來，大多數香港製造商已把生產線北移珠江三角洲（珠三角）地區。工廠北移使製造商的生產成本得以降低，香港的製造業得以迅速增長，並在環球市場維持競爭優勢。

工廠北移又助長了香港金融業和服務業的蓬勃發展。許多人承認，這些行業之所以能夠快速增長，是因為本地製造業公司在珠三角的業務日益擴大，引發了對支援配套服務的需求大幅增加；然而，此前一直缺乏系統性研究去評估兩地區的經濟關係。

工業總會主席羅仲榮說：「要能幫助香港商界有策略地發展，就要做一些比較廣泛的研究工作，掌握關於在珠三角營運的香港公司在規模、範疇和性質方面的統計資料，這是一個明顯的需要。」

他說：「工總就是因應這個需要而開展這個研究項目，研究香港與珠三角兩地之間的經濟關係。這個項目去年四月開始進行，我們把它定名為《珠三角製造 — 香港製

造業的蛻變》。」

這項研究的目的是要了解香港工貿公司*在珠三角的工業生產活動的規模與性質。項目亦試圖確定需要提供什麼科技、機構、物流基建才能更好地支援這些境外香港製造公司的境外生產，也試圖評估香港製造公司當前的機會和挑戰。

《珠三角製造》分為兩部分。第一部分的調查結果已詳見本文，第二部分的研究工作則在去年十一月才開始，預計今年上半年發表最後報告，完成整個研究項目。

第一部分的調查工作，在二〇〇二年四月進行，向共約12萬家香港工貿公司發出問卷，蒐集數據以估計這些公司在珠三角的生產規模和範疇。

香港經濟研究中心的研究小組在王于漸教授領導下整理和分析了在二〇〇二年四、五月間收回的問卷。

*是次調查的對象為二〇〇一年十二月在香港按《商業登記條例》登記，而所有被政府統計處界定為製造商（編碼：311-391）及入口／出口商（編碼：631-632）的公司。這些公司在此報告為簡稱為「香港工貿公司」。

有了這些數據，我們就能夠評估香港工貿公司在珠三角地區的投資範圍和合作程度，也可從中獲得這些香港公司在當地的投資模式、業務規模，以及產品是否外銷和／或供應內地市場等營運情況的資料。」

王于漸說：「有了這些數據，我們就能夠評估香港工貿公司在珠三角地區的投資範圍和合作程度，也可從中獲得這些香港公司在當地的投資模式、業務規模，以及產品是否外銷和／或供應內地市場等營運情況的資料。」

調查問卷的設計在發給所有工貿公司之前先進行試點調查。這次問卷調查的對象是所有經香港特區政府統計處界定為製造業或貿易商的公司，總數為122,809家（這些工貿公司包括海外擁有或資本公司）。在

估計53,000家設在廣東（僱用工人約共1,000萬），而且有很大的百分比集中在東莞、深圳和廣州。

羅仲榮說：「在廣東受僱的1,000萬工人當中，部分受僱於在香港註冊的外資公司。」據工業總會自己的估計，港資公司僱用的工人為數在七至八百萬之間。」

這些工廠主要分為外資企業和以其他合同形式（例如「三來一補」）經營的公司。調查估計，廣東53,000家工廠當中，21,000家屬外資企業，僱用工人4,750,000名；其

司設在廣東的製造業工廠佔總數的84%。

在問卷調查對象總數中，84%是貿易公司，但樣本中貿易公司只佔70%，因此，代表性被低估。至於整體回應率，則為2.1%。製造業公司和貿易業公司的回應率分別為4.1%和1.7%。這兩個相異的回應率說明這個樣本不是簡單的隨機取樣。

王于漸說：「在樣本資料分析中，我們對回應率差異採取了適當的統計步驟處理，把樣本分為96個層面（6X16），每一層面都代表著一個界別裡一個聘用人數等級。」

王于漸說：「在樣本資料分析中，我們對回應率差異採取了適當的統計步驟處理，把樣本分為96個層面（6X16），每一層面都代表著一個界別裡一個聘用人數等級。」



Since the 1980s, the majority of Hong Kong manufacturers have relocated their production lines to the Pearl River Delta (PRD) region.

自一九八〇年代以來，大多數香港製造商已把生產線北移往珠江三角洲地區。

調查結果

調查結果証實了廣東

省是香港工業最重要的生產基地。這些作業主要集中在珠三角地區進行。

工總主席羅仲榮說：「根據研調結果估計，在香港註冊的122,809家工貿公司當中，超過一半（63,000家，佔總數的52%）在內地有經濟活動。」

王于漸解釋：「由於我們的研究只集中調查這些香港工貿公司在內地的製造業生產活動，因此一家公司必須在內地參與下列三種活動其中之一才算是內地有經濟活動：（一）在內地投資設廠；（二）直接擁有內地廠房的管理權及營運權；（三）把加工工序分判給內地的外資或內資工廠。」

調查估計內地有59,000家工廠，1,100萬工人支援著這63,000家香港工貿公司的製造業活動。內地這59,000家工廠當中，

餘32,000家以其他合同形式經營，僱用工人5,590,000名，為香港工貿公司服務。

羅仲榮指出：「此前從來沒有人如此認真地估計有多少工人受僱於那些按照其他合同形式的安排，為香港工貿公司的製造業務工作。」

調查發現35%的製造業公司和55%貿易公司在內地有經濟活動。王于漸指出，在內地有經濟活動的公司當中，貿易公司比製造業公司多，這個發現從表面看來是出人意表的。

他解釋：「事實上，這個發現意味著許多經香港政府統計處界定為貿易商的公司實際上是製造商，它們之所以被稱為貿易商，只是因為它們的生產活動已經不在香港，已經遷入內地；這表明製造業可以以不同形式為香港的經濟作出貢獻，也有助糾正以為製造業對香港經濟貢獻迅速減少



研究所得 為用甚大

香港經濟研究中心利用調查第一部分的結果設計了一份更深入詳細的問卷。這份問卷已於二〇〇二年十一月發給在珠三角有製造活動的公司。《珠三角製造》第二部分研究預計將於二〇〇三年上半年完成，屆時會發表最後的總結報告。

羅仲榮說：「《珠三角製造》是工業總會過去一年的研究工作重點。我想指出，如果沒有創新及科技基金和31家贊助機構的慷慨支持，這個項目將難以展開。」

Hong Kong policy makers will be able to use the project's deliverables when formulating the strategic direction of Hong Kong's technological and economic development.

香港的決策者可以利用這個研究項目的成果，去了解香港製造業公司目前在研發方面的實力以及香港和珠三角日益密切的連繫，為香港科技及經濟發展訂定策略性方向。

的那個常見錯覺。」

雖然許多香港工貿公司已經到內地投資製造業，但是這次研究調查發現它們對香港就業情況的貢獻仍然重大。據估計，在內地有經濟活動的63,000家香港工貿公司在香港僱用工人達477,000人。

工業總會這次的調查估計，於二〇〇一年十二月在內地的工廠為香港工貿公司製造的產品當中，大約71%出口，10%轉廠作進一步加工，只有10%內銷。估計平均87%這些公司使用香港口岸把它們在內地生產的產品輸往世界市場。

至於原材料，一般而言，內地與香港工貿公司有聯繫的工廠所用的原材料當中，一半是進口的，17%是由內地別的工廠轉廠，33%是採購自內地供應商。輸入原材料的公司當中，78%經香港輸入材料。

羅仲榮說：「這次調查發現，雖然有許多香港公司在珠三角從事製造業活動，香港口岸為用依然甚大，因為不少產品出口和原材料進口是經香港進行的。我們的貨櫃碼頭連同有關的物流和運輸界別持續為許多香港人提供就業機會。」

他強調說，為了令香港與珠三角之間的貨流更加順暢，最要緊的是我們的碼頭營運商不斷地改善效率，提高服務水平；而政府也應當加快香港的物流基建發展。

除了有關企業之外，研究結果將有助香港政府和工業支援機構確定製造商的發展需要，尤其有助確定香港製造業在爭取科技先進方面的需要。

「研究結果証實了廣東省是香港工業生產作業最基礎的生產基地。這些作業主要在珠三角地區進行。」



羅仲榮說：「香港的決策者可以利用這個研究項目的成果，去了解香港製造業公司目前在研發方面的實力以及香港和珠三角日益密切的連繫，為香港科技及經濟發展訂定策略性方向。」

他說：「我肯定他們會覺得報告值得一讀，認為它清楚顯示香港公司在這個地區的經濟中是多麼的活躍。」