



引言

Introduction

香港除了是國際及亞太區的服務中心外，亦是一個泛亞太區生產網絡的控制中心。在過去三十年內，香港本身亦已演變為一個以科技為本、高增值的經濟體系。

Hong Kong is an international and regional services hub as well as a control centre for production in the region. Hong Kong has gone through repeated transformation in the past three decades, and is now a technology based, higher value-added economy.

服務業

服務業在過去二十年發展蓬勃，令香港成為世界上各個以服務業為主的經濟體系中的表表者。一九八零年至一九九八年間，服務業在本地生產總值所佔的比重由67.5%上升至84.7%。而服務業僱員人數佔本港總就業人數的百分比，亦由一九八零年的42.1%增加至一九九九年的79% (圖1)。

服務業能有所增長，實有賴製造業的不斷擴展。首先，由於廠商把製造設施遷往內地及東南亞國家，令本港各類服務行業 (例如會計、金融、運輸、市場推廣及保險等) 的需求更為殷切；其次，很多製造企業為了提高產品的吸引力，也加入了愈來愈多如設計、包裝、市場推廣及消費信貸等額外的服務元素。

Services Sector

The services sector has experienced significant growth in the past two decades, making Hong Kong one of the most service-oriented economies in the world. Between 1980 and 1998, the share of services sector in GDP increased from 67.5% to 84.7%. The share of services sector employment in the workforce of Hong Kong also grew from 42.1% in 1980 to 79% in 1999 (Chart 1).

The growth of service industries owes much to the expansion of the manufacturing sector. Firstly, the relocation of manufacturing facilities to the Mainland and South East Asian countries has boosted demand for Hong Kong services such as accounting, finance, transportation, marketing and insurance, etc. Secondly, many manufacturing firms are bringing in more and more service inputs such as design, packaging, marketing and consumer credit, to enhance the attractiveness of their products.



此外，香港人生活水平不斷上升，亦刺激了本港服務業的增長。由於各行各業的管理職能日趨複雜，市場對於金融、電訊、法律諮詢、建築服務及資訊科技等各類專業服務的需求亦愈來愈大。

內地市場對非製造業實施的開放政策和在吸引外資方面的驕人成績，亦成為推動本港服務業迅速發展的重要因素。對於很多在內地投資的本港及外國企業來說，香港服務業的支援是必不可少的。

製造業

直至八十年代初期為止，製造業仍佔有香港本地生產總值的最大比重。本港製造廠商的傳統運作模式，是將所有製造工序集中在同一地點進行。在統計上，這些公司通常會歸類為製造企業，甚至公司內的非生產僱員，例如會計師及買手等，亦會被視為製造業的僱員。

由八十年代開始，香港的製造商紛紛把土地及勞工密集的生產工序遷往內地及區內其他低成本的經濟體系內進行。香港從而發展為一控制中心，管理這些已遷移外地的生產操作及為這些生產基地提供各項生產前的支援和後勤服務。

很多香港公司的業務已不再涉及將原料經形態或化學上的轉變而成為有形產品的製造程序。因此，在統計這些香港的企業對本港經濟的貢獻時，已把它們改為歸入“服務業”一類；這樣構成為何製造業僱員人數和製造業佔本地生產總值的比重在過去二十年來下跌的部分原因。

Rise in the living standard of Hong Kong people also contributed to the growth of the service industries. Growing complexity of management functions also generated demand for specialised service inputs in areas such as finance, telecommunications, legal consultancy, architectural service and information technology.

The opening of the Mainland market to services sectors and the increase in inflow of investments to the Mainland also fuelled the rapid expansion of the services sector. Many local and foreign enterprises with investment in the Mainland require the support of the service industries in Hong Kong.

Manufacturing Sector

The manufacturing sector had been the largest contributor to the gross domestic product (GDP) of Hong Kong until the early 1980s. The traditional mode of operation of many Hong Kong manufacturing firms was to conduct all the manufacturing processes locally under the same roof. These firms were categorised as manufacturing enterprises for statistical purpose. Even their non-production staff such as accountants and merchandisers were also counted as manufacturing employees.

Starting from the 1980s, many manufacturers in Hong Kong began to shift their land and labour intensive operations to the Mainland and other low-cost economies in the region. Hong Kong has since become a management control centre which oversees the relocated manufacturing operations and provides all sorts of front-end and back-end support.

The activities of many firms in Hong Kong no longer involved any physical or chemical transformation of raw materials into tangible products. The economic contribution of these Hong Kong-based enterprises came to be re-categorised statistically as contribution by 'services'. This partly explained the statistical drop in manufacturing employment and the decrease in manufacturing contribution to Hong Kong's GDP in the past two decades.



但製造業對本港經濟的貢獻之大，遠非統計數字所能完全反映出來。事實上，香港的生產基地已超越本土而伸展至內地及區內的其他經濟體系。

由於較低技術及較低增值的活動多已轉移至其他地區進行，本港可把更多資源投入本地一些較高增值及知識密集的活動之中。本地廠家這些年來致力改進生產力、自動化操作和產品設計及品質。很多本地公司已在科技領域上建立了享譽世界的名聲，其中在半導體裝配和測試及多層電路版、液晶體顯示器和微型發動機的設計和製造方面，成就更為特出。香港的廠商在電池、電子教育工具及高頻無線電話等產品上亦建立了馳譽世界的品牌。

But the contribution of the manufacturing sector to the Hong Kong economy is far more important than what the statistics suggest. In reality, Hong Kong's manufacturing base has extended beyond its territory into the Mainland China and reached out to other economies in the region.

The relocation of lower skilled and lower value-added activities to other areas has unleashed more resources for carrying out higher value-added and knowledge-intensive activities in Hong Kong. Local manufacturers have been making painstaking efforts to improve productivity, automation, product design and quality of their products. Many home-grown companies have established a worldwide reputation in the technology arena, notably in the fields of semiconductor packaging and testing, design and manufacturing of multi-layer printed circuit boards, liquid crystal display units and micro-motors. Hong Kong manufacturers also carry highly esteemed household brandnames for products such as batteries, electronic educational tools and high frequency digital cordless telephones.

香港的實力

一九九九年，香港的人均本地生產總值達180,000港元，相當於23,000美元，是區內最高的經濟體系之一。在一九九九年底，本港的外匯儲備達963億美元，佔全球的第四位。

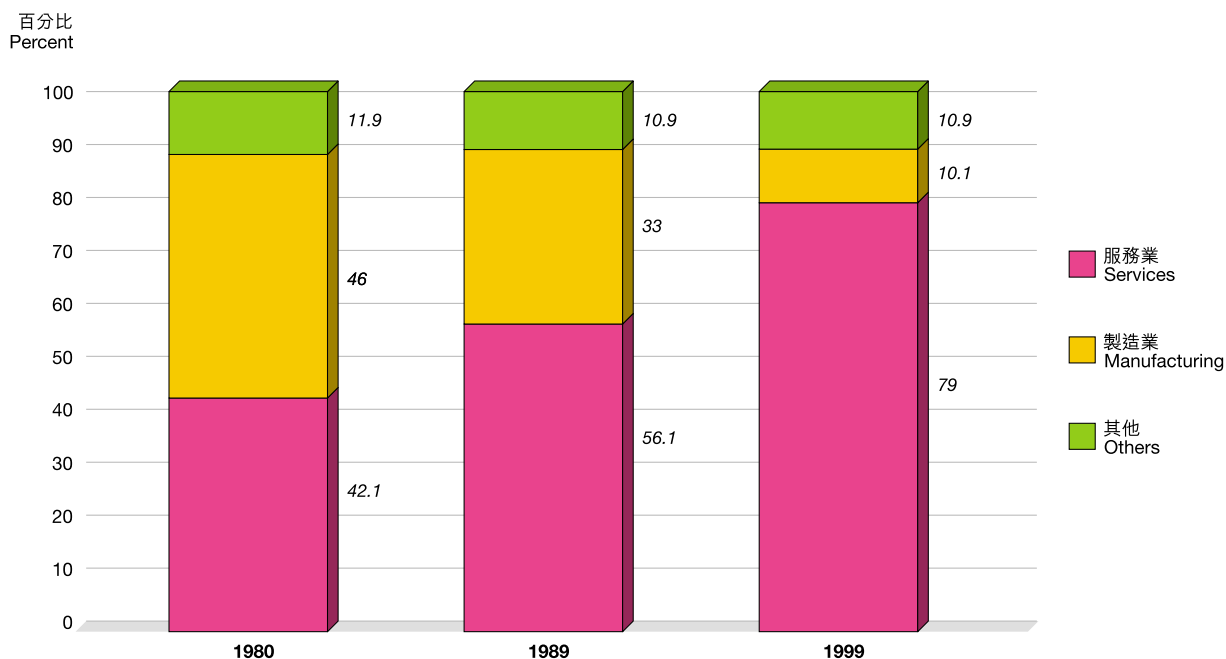
一九九九年，香港是世界第十大服務出口地及第十大貿易經濟體系(如將歐洲聯盟視為一個統一體的話，本港更進佔第六位)。香港亦是多類產品的世界最大出口地之一，其中包括紡織品及成衣、鐘錶、首飾及玩具等。

Strength of Hong Kong

Hong Kong's per capita GDP, at HK\$180,000 or US\$23,000 in 1999, was amongst the highest in the region. Foreign currency assets reserve, at US\$96.3 billion at end-1999, was the 4th highest in the world.

Hong Kong was the world's 10th ranking exporter of services and the 10th largest trading economy in 1999 (6th if the European Union is taken as a single entity). It is one of the world's leading exporters of a wide variety of products including textiles and clothing, watches and clocks, jewellery and toys, etc.

圖1 一九八〇年、一九八九年及一九九九年製造業及服務業佔總就業人數的比率
Chart 1 Contribution to total workforce by the manufacturing and services sectors, 1980, 1989 and 1999



資料來源 Source

政府統計處《僱傭、空缺及薪金總額統計報告》

Reports of Employment, Vacancies and Payroll Statistics, Census and Statistics Department

香港是亞太區內一個重要的商業控制中心。截至一九九九年六月一日為止，不同類型的跨國公司在港共設立了840間地區總部及1 650間地區辦事處。在一九九八年底，香港的外來投資總值為17,440億元，其中16,587億元(95.1%)投入非製造行業，另外853億元(4.9%)則投入製造業。外來投資額最大的國家，包括中國內地、英國、美國及日本。

香港的工商業得以蓬勃發展，其成功之道在於優良的營商環境；稅制簡單而稅率偏低；政府奉行自由市場及自由企業政策的立場堅定不移；與內地相連而得享地利；企業家精神早已根植於社會；以及近年積極從事於創新科技之發展。

Hong Kong is an important regional control centre for business. As at 1 June 1999, various multinational corporations have set up a total of 840 regional headquarters and 1 650 regional offices in Hong Kong. Total external investment in Hong Kong amounted to \$1,744 billion at end-1998. Of these, \$1,658.7 billion (95.1%) was invested in non-manufacturing sectors while \$85.3 billion (4.9%) in manufacturing industries. The largest overseas investors included Mainland China, the United Kingdom, the United States and Japan.

Hong Kong industries thrive on a business friendly environment, a simple and low tax system, Government's commitment to free market and free enterprise, proximity to Mainland China, strong tradition of entrepreneurship in the community and more recently aspiration for innovation technology.

