

策略發展委員會

香港特別行政區政府 配合國家「十三五」規劃的工作

目的

本文件旨在向委員會簡介香港特別行政區政府（特區政府）配合國家「十三五」規劃的工作，並就特區政府擬議的課題諮詢各委員。

背景

國家五年規劃

2. 國家五年規劃勾畫了國家在未來五年規劃期間的發展方向和目標，具體說明政府的工作重點，是國家經濟和社會發展的藍圖和行動綱領。由政務司司長主持的「與內地合作督導委員會」一直督導及統籌特區政府各相關政策局及部門有關配合國家五年規劃的工作。

國家「十二五」規劃 (2011-15 年)

3. 2011 年 3 月公布的國家「十二五」規劃，首次將有關港澳部分單獨成章，凸顯了中央政府在「一國兩制」下，對香港多方面的支持，包括支持香港鞏固和提升國際金融、貿易、航運中心的地位；支持香港培育新興產業，及發展優勢產業；支持深化內地與香港的經濟合作，繼續實施《內地與香港關於建立更緊密經貿關係的安排》，並確定粵港合作的重要功能定位。中央政府隨後於 2011 年 8 月，宣布了三十多項中央政府在國家「十二五」規劃下所制定，支持香港進一步發展、深化與內地經貿金融合作的具體政策措施，涵蓋經貿、金融、旅遊、粵港合作及社會事業和民生等不同的範疇，

為香港特區落實國家「十二五」規劃的工作提供了具體的內容。

配合國家「十三五」規劃的工作

4. 國家「十三五」規劃將作為國家在2016至2020年的發展藍圖和行動綱領。內地有關國家「十三五」規劃的前期研究工作已經啟動。國家發展和改革委員會已表示，正考慮在編制國家「十三五」規劃的時候，繼續把港澳作為單獨的一部分來考慮，以促進港澳的經濟發展，特別支持香港鞏固提升國際金融、貿易、航運中心的地位。

5. 因應內地正式啟動國家「十三五」規劃的前期研究工作，特區政府早前亦已開展相關配合工作。現階段，有關的政策局及部門正就其擬議的課題範疇徵詢業界及與其相關的諮詢委員會，聽取他們的意見。擬議的課題均屬有利於香港和國家整體長遠發展的策略性課題，涵蓋的範疇包括：

- (i) 離岸人民幣、資產管理及風險管理業務，進一步提升香港國際金融中心的地位；
- (ii) 全面實現內地和香港服務貿易自由化；
- (iii) 航運、郵輪發展，進一步鞏固及提升香港國際航運中心及旅遊中心的地位；
- (iv) 科技及文化創意產業發展，發展具潛力的產業並增強整體競爭力；
- (v) 法律及解決爭議服務，發揮香港的法律制度及專業優勢並鞏固國際地位；以及
- (vi) 珠三角空氣質素，確立改善區域空氣質素的目標。

就上述課題，相關政策局及部門已擬備簡報資料(見附件)，並將於會上向委員作出簡介。

6. 相關政策局及部門在聽取業界及相關的諮詢委員會的意見後，特區政府會把擬議的課題範疇歸納並整理成特區就國家「十三五」規劃向中央政府提交的建議，讓中央政府在進行前期研究工作時能一併考慮特區的建議，以配合國家其後擬定的「十三五」規劃整體發展策略。

7. 特區政府會在「一國兩制」的原則下，主動做好配合國家「十三五」規劃的工作，以抓緊國家發展帶來的機遇，鞏固及提升香港的競爭優勢。

徵詢意見

8. 請委員就特區政府擬議的課題提出意見。

政制及內地事務局

2014 年 7 月

策略發展委員會
國家「十三五」規劃
Commission on Strategic Development
National 13th Five-Year Plan

金融方面
Financial Initiatives

2014年7月31日
31 July 2014



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Risk Management Centre and Financing Platform
 3. 深化兩地金融市場互聯互通
Deepening Mutual Access Between the Financial Markets of the Mainland and Hong Kong



「十二五」規劃 National 12th Five-Year Plan

支持香港發展成為離岸人民幣業務中心
及國際資產管理中心

Supporting Hong Kong to develop into an offshore RMB business
centre and an international asset management centre



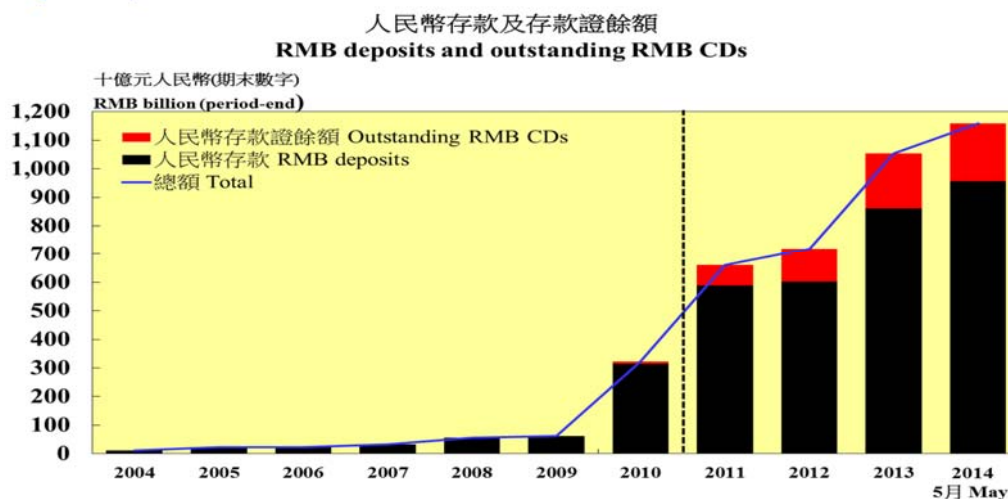
「十二五」規劃 – 實施情況 National 12th Five-Year Plan – Implementation

1. 離岸人民幣業務

Offshore RMB business

- 存款 - 香港人民幣存款和存款證餘額，從2010年底的3,217億元人民幣，增加2.6倍至今年5月底的11,590億元人民幣。

Deposits – The RMB deposits and outstanding RMB certificates of deposit in Hong Kong increased from RMB321.7 billion at end-2010 to RMB1,159 billion at end May 2014, an increase of 2.6 times.



「十二五」規劃 – 實施情況

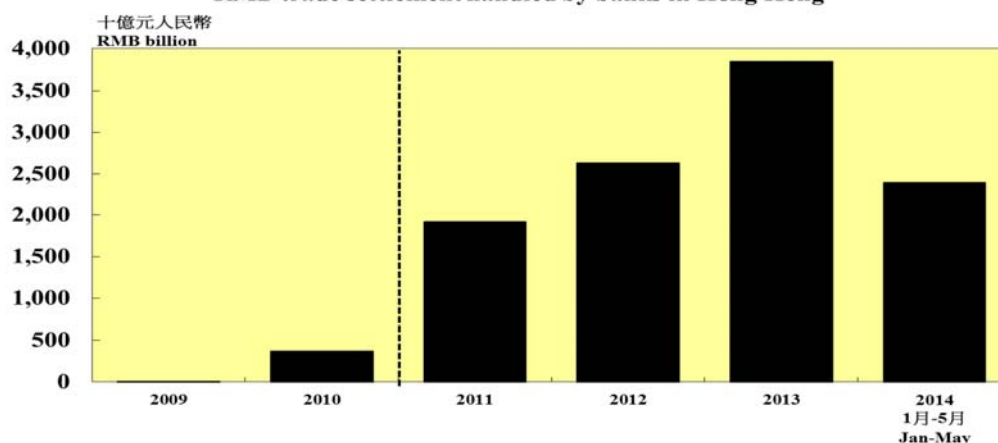
National 12th Five-Year Plan – Implementation

1. 離岸人民幣業務

Offshore RMB business

- 貿易結算 – 經香港銀行處理的人民幣貿易結算，從2010年的3,692億元人民幣，增加9.4倍至去年的38,410億元人民幣。今年首五個月，結算量更達到23,950億元人民幣。
Trade settlement – RMB trade settlement handled by banks in Hong Kong increased from RMB369.2 billion in 2010 to RMB3,841.0 billion in 2013, an increase of 9.4 times. In the first five months of 2014, the amount reached RMB2,395 billion.

經香港銀行處理的人民幣貿易結算
RMB trade settlement handled by banks in Hong Kong



「十二五」規劃 – 實施情況

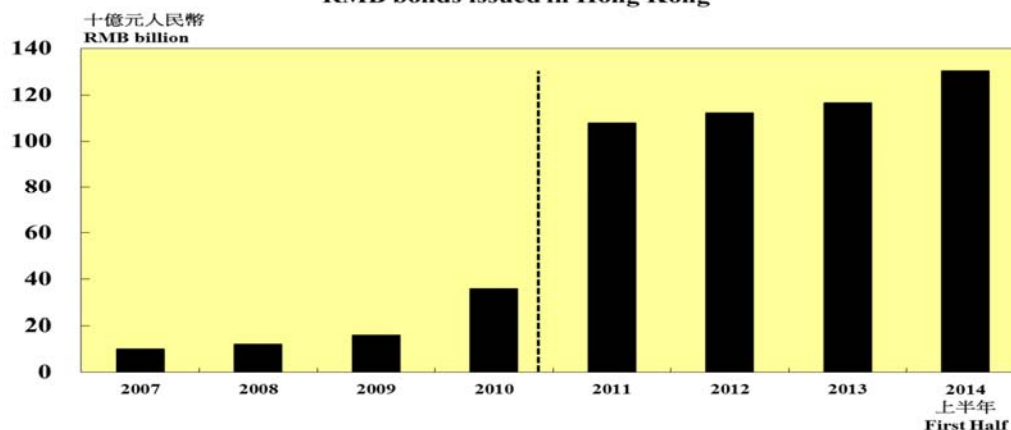
National 12th Five-Year Plan – Implementation

1. 離岸人民幣業務

Offshore RMB business

- 債券 – 在香港發行的人民幣債券總值，從2010年的358億元人民幣，增加2.3倍至去年的1,166億元人民幣。今年上半年，發行量更達到1,302億元人民幣，超越去年全年的水平。
Bonds – The value of RMB bonds issued in Hong Kong increased from RMB 35.8 billion in 2010 to RMB116.6 billion in 2013, an increase of 2.3 times. In the first half of 2014, the value reached RMB130.2 billion, more than the total RMB bond issuance in 2013.

在香港發行的人民幣債券
RMB bonds issued in Hong Kong



「十二五」規劃 – 實施情況

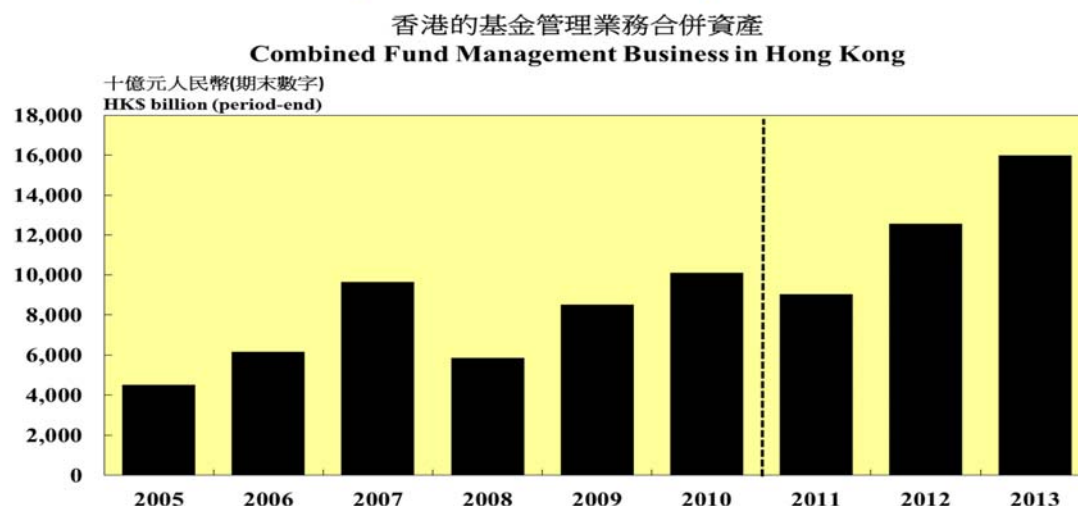
National 12th Five-Year Plan – Implementation

2. 資產管理業務

Asset Management business

- 香港的基金管理總資產值，從2010年底的十萬億港元，增至2013年底的十六萬億港元，增幅達60%。

The total asset value of funds managed in Hong Kong increased from HK\$10 trillion as at end-2010 to HK\$16 trillion as at end-2013, an increase of 60%.



「十二五」規劃 – 實施情況

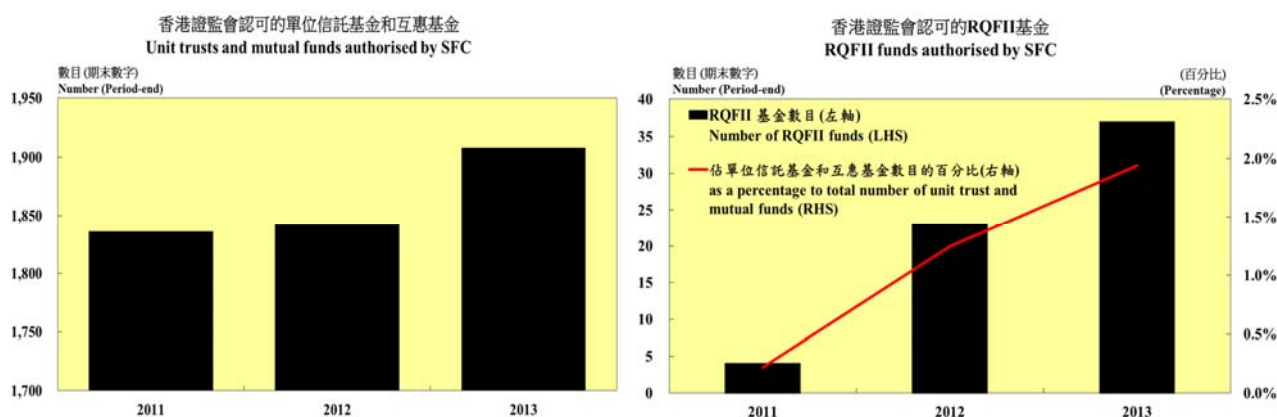
National 12th Five-Year Plan – Implementation

2. 資產管理業務

Asset Management business

- 香港證監會認可的人民幣合格境外機構投資者(RQFII)零售投資基金，由2011年底首批共四隻，增加8.3倍至2013年底的37隻。RQFII基金佔單位信託基金和互惠基金數目的百分比，由0.2%增加至1.9%。

The number of RMB Qualified Foreign Institutional Investors (RQFII) retail investment funds authorised by SFC increased from the first batch of four at end-2011 to 37 at end-2013, an increase of 8.3 times. The number of RQFII funds as a percentage of the total number of unit trusts and mutual funds increased from 0.2% to 1.9%.



「十二五」規劃 – 實施情況

National 12th Five-Year Plan – Implementation

3. 近期發展

Recent development

➤ 滬港通

Shanghai-Hong Kong Stock Connect

- 於今年4月公布的滬港通，將進一步鞏固香港作為首要的離岸人民幣業務中心的地位。
The Shanghai-Hong Kong Stock Connect, which was announced on 10 April 2014, will further reinforce Hong Kong's position as a premier offshore RMB business centre.

➤ 基金互認

Mutual recognition of funds

- 證券及期貨事務監察委員會和內地相關機構就兩地建立基金互認安排，已經基本達成共識。政策落實後，兩地基金產品的種類會更多元化。
Consensus has been reached between the Securities and Futures Commission and relevant Mainland authorities on the mutual recognition of funds. Subject to policy approval, this arrangement will further promote the diversification of fund products in the Mainland and Hong Kong.



「十三五」規劃 - 政策方向和建議

National 13th Five-Year Plan - Policy Direction and Proposals



「十三五」規劃 – 政策方向

National 13th Five-Year Plan – Policy Direction

1. 配合國家全面深化改革和對外開放的政策，進一步參與和推動內地資本市場雙向開放和逐步實現人民幣可自由兌換。
Complement national policy of the deepening of reform and opening up, and further participate in and promote the two-way opening up of Mainland capital markets, with a view to realising the free convertibility of the RMB in a progressive manner.
2. 繼續鞏固和提升既有優勢，致力發揮香港作為內地資金和企業「走出去」的橋樑作用。
Continue to consolidate and enhance existing strengths, and strive to act as a bridge for Mainland capital and enterprises to "go global".



「十三五」規劃 – 建議

National 13th Five-Year Plan – Proposals

1. 深化「十二五」規劃的政策方向，鞏固和提升香港作為全球離岸人民幣業務樞紐和國際資產管理中心的地位。
Deepening the policy direction of National 12th Five-Year Plan, consolidating and enhancing Hong Kong's status as the world's offshore RMB business hub and an international asset management centre.
2. 推動香港發展成為國家的國際風險管理中心和區內重要的國際融資平台。
Promoting the development of Hong Kong into an international risk management centre for our country and an important international financing platform in Asia.
3. 深化兩地金融市場互聯互通。
Deepening mutual access between the financial markets of the Mainland and Hong Kong.



1. 離岸人民幣業務及資產管理業務 Offshore RMB Business and Asset Management Business

具體政策措施 (人民幣業務方面)

Specific Policy Initiatives (on RMB business)

- 配合國家資本帳開放的步伐，加強人民幣資金於在岸和離岸市場之間雙向跨境流動，包括 -
Complement the opening up of China's capital account by strengthening the two-way cross-border flow of RMB funds between onshore and offshore markets, including -
 - 發展更多以人民幣交易的產品，推動更多人民幣資金的跨境投資和融資活動。
Developing more RMB-denominated products and promoting cross-border investment and financing activities in RMB.
 - 通過香港作為試點，有效、按步推進人民幣國際化。
Promoting the internationalisation of the RMB in an effective and progressive manner through acting as a testing ground.
 - 強化香港作為內地與全球各地之間人民幣資金往來的平台，致力提升人民幣交易量。
Reinforcing Hong Kong as a platform for RMB fund circulation between the Mainland and the world, with a view to enhancing RMB trading volume.



1. 離岸人民幣業務及資產管理業務 Offshore RMB Business and Asset Management Business

具體政策措施 (資產管理業務方面)

Specific Policy Initiatives (on asset management business)

- 加強香港資產管理業的發展，推廣內地的企業和個人利用香港平台管理資產和作境外投資，包括 -
Foster the development of Hong Kong's asset management industry by encouraging Mainland enterprises and individuals to manage their assets and make outward investment through the platform in Hong Kong, including -
 - 設立分支機構、開發投資產品、拓展分銷網絡等，以建立並鞏固其國際品牌。
Establishing and consolidating international brands through establishing branches, developing investment products, expanding distribution networks, etc.
 - 促進兩地資產管理業界的合作，建立兩地基金互認安排，為兩地投資者提供更多元化的產品選擇。
Promoting cooperation of the asset management industry between the two places and establishing the mutual recognition of funds arrangement to provide more diversified products for the investors of the two places.



2. 風險管理中心及融資平台

Risk Management Centre and Financing Platform

具體政策措施

Specific Policy Initiatives

- 鼓勵內地機構在香港設立專屬自保公司和內地保險企業透過香港分出定額比率的再保險安排。
Encourage Mainland enterprises to set up captive insurers in Hong Kong and Mainland insurance companies to conduct reinsurance business through Hong Kong.
- 加強兩地貨幣、商品期貨等多種衍生產品的合作，通過跨地域產品相互上市，豐富內地管理資產風險的工具，協助內地企業有效管理風險，與國際逐步接軌。
Strengthen collaboration of derivatives on products such as currency commodity futures between the Mainland and Hong Kong through allowing cross-border listing, developing more tools for managing risk in asset and helping Mainland enterprises to effectively manage risk and gradually align with international practices.
- 融資平台方面，鼓勵內地企業到香港進行境外融資。
On financing platform, encourage Mainland enterprises to raise funds in Hong Kong.



3. 深化兩地金融市場互聯互通

Deepening Mutual Access Between the Financial Markets of the Mainland and HK

具體政策措施

Specific Policy Initiatives

- 在滬港通機制的基礎上，把握國家資本項下審慎、加速開放的種種機遇 —
Building on existing basis of Shanghai-Hong Kong Stock Connect, seize the opportunities presented by the prudent and further liberalisation of Mainland's capital account.
 - 在證券方面，加強與內地交易所及結算所合作。
On securities, foster closer co-operation with Mainland stock exchanges and clearing houses.
 - 在商品期貨方面，積極研究探討開展兩地市場互通的可行性。
On commodity futures, actively explore the possibility of establishing mutual market access between the Mainland and Hong Kong.



互惠互利 Mutual Benefits

對國家的貢獻

Contribution to the Country

- 配合國家在風險可控的前提下，以香港作為試驗田，進一步推進金融改革，容許資本帳目以循序漸進和於風險可控情況下逐步開放，長遠實現人民幣可自由兌換。
Hong Kong can complement our country's policy of implementing further financial reforms in a risk-controlled manner by serving as a testing ground, which facilitates the liberalisation of the Mainland's capital account in a progressive and risk-controlled manner, with a view to realising the free convertibility of RMB.

對香港未來發展的重要性

Importance to the Future Development of Hong Kong

- 有利於支持和鞏固香港作為國家的國際風險管理中心，以及轉型成為一個能夠提供全方位股本、定息、貨幣及商品產品的綜合性國際金融中心。
Conducive to maintaining and consolidating Hong Kong's status as an international risk management centre for our country and transforming Hong Kong into a comprehensive international financial centre offering a full range of equity, fixed income, foreign exchange and commodity products.



謝謝
Thank You





Commission on Strategic Development

策略發展委員會

National 13th Five-Year Plan

國家「十三·五」規劃

Achieve Full Liberalisation of Trade in Services
between Mainland and Hong Kong
全面實現內地和香港服務貿易自由化

31 July 2014
2014年7月31日

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中央政府現時的政策 Current Policy of Central People's Government

- 「十二·五」規劃期末（即2015年底）
基本實現內地與香港服務貿易自由化

By the end of National 12th Five-Year Plan period (i.e. end 2015), Mainland and HK to achieve basic liberalisation of trade in services



基本實現服務貿易自由化 Achieve Basic Liberalisation of Trade in Services

- 內地對香港開放**95%**以上的服務領域（按世貿服務部門分類）
Mainland to open up more than 95% of its service sectors according to WTO's service sectoral classification.
- 在多數開放的領域，取消外資項目審批及外資企業合同章程審批，改為備案制。
In the majority of sectors being opened up, the authorities will no longer vet individual investment projects nor contracts and articles of association of HK enterprises concerned. Instead, they will simply record the relevant information.

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基本實現服務貿易自由化 Achieve Basic Liberalisation of Trade in Services

- 但很多開放的領域，在持股比例、經營範圍、資質要求等方面，仍存在顯著的限制措施。
However, in many of such sectors, there will still be significant restrictions on, e.g. shareholding percentage, scope of business, and qualification requirements.
- 個別領域的限制措施，採用負面清單的模式列出。
Restrictions in individual sectors will be set out using negative list approach.

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「十三・五」規劃的建議 Proposal for 13th Five Year Plan

內地與香港全面實現服務貿易自由化
Achieve full liberalisation of trade in services
between Mainland and Hong Kong

- 「十三・五」規劃期內，內地服務業市場，在廣度和深度上都對香港全面開放。
Mainland to open up its services market for HK both in breadth and in depth during “13th Five-Year Plan” period.

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全面實現服務貿易自由化 Achieve Full Liberalisation of Trade in Services

廣度方面 (breadth)

- 除了極少數敏感領域外，其餘的領域都對香港開放
Except for very few sensitive sectors, all sectors will be opened up to HK

深度方面 (depth)

- 開放的服務領域，在資質要求、持股比例、經營範圍等方面，對香港服務業實行國民待遇
In the opened up sectors, provide national treatment to HK service suppliers with regard to qualification requirements, shareholding percentage, scope of business, etc.

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建議的好處 **Benefits of the proposal**

- 為內地經濟升級轉型、服務業現代化發揮催化作用
Catalyst for Mainland's economic transformation and upgrading, as well as modernisation of its services industries
- 促進兩地資金、人才、技術流通，使兩地經濟互惠互利
Facilitate flow of capital, personnel and technology between the two places, bringing benefits to both economies
- 為香港帶來實質利益，提升香港競爭力，促進社會穩定發展
Bring substantive benefits to HK, enhance HK's competitiveness, and contribute to social stability and development

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謝謝

Thank you

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香港在國家「十三·五」規劃中的定位 Hong Kong's Positioning in the National 13th Five-Year Plan

郵輪旅遊業 Cruise Tourism

策略發展委員會
Commission on Strategic Development

2014年7月31日
31 July 2014

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目標 Aim

- 通過優化硬件發展及軟件配套，政府正致力發展香港成為區內具領導地位的郵輪樞紐。
- The Government is committed to developing Hong Kong into a leading regional cruise hub, by enhancing both the hardware and software developments.





香港作為區內郵輪樞紐的優勢

Advantages of Hong Kong for becoming the Regional Cruise Hub

- 位處亞太區的策略性地理位置
Strategic geographical location in Asia Pacific Region
- 維多利亞港水深寬闊，沒有淨空高度限制
Victoria Harbour – deep and wide with no air draft limit
- 航空運輸網絡遍蓋全球
Extensive aviation network
- 基礎建設 (包括啓德郵輪碼頭，及完備的交通網絡)
Infrastructure (including the Kai Tak Cruise Terminal and extensive transport network)

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國家「十三五」規劃具體計劃 -- 郵輪旅遊業

Major Initiative of the National 13th Five-Year Plan -- Cruise Tourism

- 多個內地鄰近港口（如深圳蛇口太子港）正積極發展成為郵輪母港，為避免香港與內地資源重疊，並互補優勢，有需要加強鄰近港口之間的協調，串連發展為具吸引力的航線。
- Various neighbouring ports in the Mainland (e.g. Shekou Port in Shenzhen) are actively transforming into homeports for cruises, to avoid overlapping of resources between Hong Kong and the Mainland, as well as to complement the advantages of individual ports, it is necessary to strengthen the liaison among nearby ports, thereby developing attractive cruise itineraries by linking up the ports.
- 在國家「十三五」規劃中，確立支持香港成為國家重點國際郵輪旅遊中心，及亞太區內主要郵輪母港，並透過與內地港口合作，以促進國家郵輪旅遊業在國際市場的發展。
- In the National 13th Five-Year Plan, support Hong Kong to become the main international cruise hub of the country, as well as the major cruise homeport within the Asia-Pacific region, and to co-operate with ports in the Mainland, thereby promoting the development of cruise tourism of the country in the international market.

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國家「十三五」規劃具體計劃 -- 郵輪旅遊業 Major Initiative of the National 13th Five-Year Plan -- Cruise Tourism

- 國家旅遊局於2013年8月15日就關於允許內地旅行團乘郵輪從香港出發到台灣後，繼續乘坐該郵輪到日本或韓國旅遊，然後返回內地的安排發出通知。
- On 15 August 2013, the China National Tourism Administration (CNTA) made an announcement on the arrangement about allowing Mainland tour groups setting off from Hong Kong on cruise ships to continue their journey on the same cruise ships to Japan or Korea after Taiwan before returning to the Mainland.
- 旅遊事務署會繼續與國家旅遊局保持聯繫，探討如何推展有關措施。
- Tourism Commission will continue liaising with CNTA to explore the implementation of the measure.

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謝謝

Thank you

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創意產業 Creative Industries



Photo source 照片來源: AllRightsReserved Ltd

一. 建議 I. Proposal

- 充分發揮香港連繫內地和海外市場的橋樑作用，加強內地和香港在創意產業的合作，拓展香港創意產業在內地 (尤其是廣東省) 的服務範圍

Give full play to Hong Kong's role as a bridge between the Mainland and overseas markets, strengthen the collaboration between the Mainland and Hong Kong in creative industries, and expand the business scope of Hong Kong's creative industries in the Mainland (particularly the Guangdong Province)

二. 具體政策措施

II. Specific Policy Measures

- 香港音像製品、圖書、遊戲、電視節目等創意作品在內地商機無限，亦有助促進內地有關產業發展並從而走向國際市場。

Amongst the Hong Kong's creative products, audio-visual products, books, games and television programmes have substantial business opportunities in the Mainland. They can also help facilitate the development of the relevant creative sectors in the Mainland to go global.

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二. 具體政策措施

II. Specific Policy Measures

- 審批香港作品的時間相對內地同類型作品來說較長。如能把適用於香港作品的審批機制與內地看齊，可讓香港創意產業更快捷地進入內地市場，紮根內地，共同提升內地和香港創意產業的水平。

The current processing time required for vetting and approving creative products from Hong Kong is relatively longer than that for Mainland products of the same kind. If the vetting and approval mechanism applicable to Hong Kong's creative products could be aligned with that currently applicable to Mainland products, the access of Hong Kong's creative industries to the Mainland market would be greatly facilitated and the levels of creative industries of both Hong Kong and the Mainland could be further enhanced.

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三. 建議對國家的貢獻

III. The Proposal's Contribution to the Country

- 促進內地創意產業升級轉型
Fostering the upgrading of the creative industries in the Mainland
- 內地與香港創意產業共同進軍國際市場
Creative industries of both the Mainland and Hong Kong will jointly develop the global market

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四. 建議對香港未來發展的重要性

IV. The Importance of the Proposal to Hong Kong's Future Development

- 拓展香港創意企業在內地市場的發展空間
Broadening the room for business development in the Mainland market for Hong Kong's creative establishments
- 推動創意產業發展成為香港新興產業的支柱
Promoting development of creative industries as a pillar of the emerging industries of Hong Kong
- 促進內地與香港商業合作
Promoting business co-operation between the Mainland and Hong Kong

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**科技及文化創意產業:
Technology, and Cultural and Creative
Industries:**

**有關香港特區政府發展
「創新科技」的建議
Proposal on the Development of
“Innovation and Technology” by the
HKSAR Government**

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一. 建議

I. Proposal

- 在國家「十三五」期間，把香港發展成為國家科研人才 的 培 養 基 地 之 一
Develop Hong Kong into one of the bases for nurturing national scientific research talents during the period of the National 13th Five-Year Plan

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二. 具體政策措施

II. Specific Policy Measures

- 向12間在2010年或以前成立的國家重點實驗室夥伴實驗室，啟動第一輪國家重點實驗室夥伴實驗室評估工作
Launch the first round of reassessment on the 12 Partner State Key Laboratories approved in or before 2010.
- 繼首個試點國家工程技術研究中心香港分中心在2012年獲科技部批准，展開首輪國家工程技術研究中心香港分中心申請工作
Commence the first round of invitation for applications for establishment of Hong Kong Branches of Chinese National Engineering Research Centres, following the first pilot Hong Kong Branch approved by the Ministry of Science and Technology (MOST) in 2012.

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二. 具體政策措施

II. Specific Policy Measures

- 自2010年科技部允許本港大學或科研機構的內地研發機構直接申請973計劃，4個科研項目成功獲撥款共達人民幣1億元。考慮進一步推廣973計劃，深化兩地合作
Since 2010, MOST allowed the Mainland subsidiaries of HK universities/R&D centres to apply direct the 973 Programme. Four projects have been approved with funding of over RMB 100mil. Consider further promoting the “973” Programme to deepen collaboration between the two places.
- 香港科學園擔當吸引內地企業走出去，以及外國企業進軍內地的平台
Position Hong Kong Science Park as a platform to attract Mainland enterprises to go global and for foreign enterprises to access the Mainland market

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三. 建議對國家的貢獻

III. The Proposal's Contribution to the Country

- 建議配合國家「十三五」規劃前期研究
The proposal dovetails with the preliminary study of the National 13th Five-Year Plan
- 香港適合作為國家科研人才的培養基地之一
Hong Kong is well-positioned to serve as one of the bases for nurturing national scientific research talents

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四. 建議對香港特區未來發展的重要性

IV. The Importance of the Proposal to the HKSAR's Future Development

- 藉著內地與香港科研人員的進一步合作和交流，帶動更多科研機會，推動香港的創新及科技發展，有助香港邁向以知識為本的世界級經濟體系
With enhanced cooperation and exchanges between the research communities in the Mainland and Hong Kong, more research opportunities will emerge,. This would help promote the development of innovation and technology in Hong Kong and help Hong Kong move towards a world-class, knowledge-based economy

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提升香港國際航運中心地位 Enhancing Hong Kong's Position as an International Maritime Centre

國家十三五規劃

The National 13th Five-Year Plan

運輸及房屋局
Transport and Housing Bureau

31.07.2014

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國家 “十二五” 規劃

The National 12th Five-Year Plan

- 國家 “十二五” 規劃：繼續支持香港發展金融、航運、物流、旅遊、專業服務、資訊以及其他高增值服務業，支持香港發展高價值貨物存貨管理及區域分銷中心，鞏固和提升香港國際金融、貿易、航運中心的地位。

The National 12th Five-Year Plan: Continue to support for Hong Kong to develop finance, shipping, logistics, tourism, professional and information technology as well as the other high-value added services, and support for Hong Kong to develop high-value goods inventory management and regional distribution centre, thereby consolidating and enhancing Hong Kong's status as an international centre for financial services, trade and shipping.

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“十二五” 規劃的跟進

Follow-up on the National 12th Five-Year Plan

- **“提升香港國際航運中心地位” 顧問研究總結**
Recommendations by the Consultancy Study “Enhancing Hong Kong’s Position as an International Maritime Centre”
 - 有潛力匯聚各類高增值的航運服務；
Potential to congregate a diversity of high value-added maritime services;
 - 成為亞洲區首選的國際航運服務中心；
Become the preferred base in Asia for international maritime business;
 - 內地企業走向國際的跳板；
A springboard for Mainland maritime companies to “go global” ;
 - 建議成立法定機構推動航運業發展。
Propose to set up a new statutory maritime body to propel the development of the maritime industry.

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“十二五” 規劃的跟進

Follow-up on the National 12th Five-Year Plan

- **海運及空運人才培訓基金（MATF）**
 - 成立 1 億元基金支持在職人士提升技能和為學生提供獎學金和實習等。
Establishing MATF (HK\$100 million) to support in-service practitioners’ skills upgrading and provide scholarships and internships for students.
- **最近推廣活動 Latest Promotional Activities**
 - 舉辦亞洲航運及物流會議。第四屆會議將於今年11月舉辦，預計有 1,700 位來自全球 30 多個國家/地區的與會者。
The fourth Asian Logistics and Maritime Conference will be held in November, expecting to draw 1,700 attendees from 30 countries/regions.
 - 今年6月，參加有來自 93 個國家 / 地區約 19,000 人次出席的希臘POSIDONIA國際航運展。同時在倫敦舉辦了研討會“亞洲航運的明天：上升的飛龍”。
Took part in the Posidonia Exhibition in Greece (June 2014), which received about 19,000 attendees from 93 countries/regions. Organised the seminar “The Future of Asia Maritime : The Emerging Dragons” in London on 6 June.

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香港航運服務 Hong Kong's Maritime Cluster



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香港航運業優勢

Competitive Edge of Hong Kong's Maritime Industry

- 法制完善且司法獨立
Rule of law underpinned by an independent judicial system
- 全球最自由經濟體、簡單而低的稅制
The world's freest economy with a simple and low tax regime
- 資訊和資金自由流動，貨幣自由兌換促進船舶融資的發展
Free flow of capital and information, and a freely convertible currency, facilitate the development of shipping finance
- 國際航運業務豁免利得稅
Income derived from international operation of Hong Kong-registered ships is generally exempt from profit tax
- 船舶註冊（香港旗）總噸位排名全球第四
Ranking No.4 in the world in terms of gross tonnage on Shipping Register
- 有競爭力的海事仲裁服務，裁決可在 140 多個司法管轄區得到執行
Competitive edge in maritime arbitration services; arbitration awards can be enforced in over 140 jurisdictions

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未來發展趨勢 (I)

Future Development Trend (I)

- 內地經濟前景
The Mainland's economic outlook

國家/地區 Country/Region	國際貨幣基金會的 經濟增長預測 (2014) IMF's GDP forecast (2014)	國際貨幣基金會的 經濟增長預測 (2015) IMF's GDP forecast (2015)
中國 China	+7.4%	+7.1%
美國 US	+1.7%	+3.0%
歐元區 Euro Area	+1.1%	+1.5%
日本 Japan	+1.6%	+1.1%

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未來發展趨勢 (II)

Future Development Trend (II)

- 港口吞吐量：世界 10 大貨櫃港口中，中國佔 7 個。
Port throughput: 7 out of the top 10 container ports are in China.

貨櫃港口 Container Port	2013 貨櫃吞吐量 (千個標準貨櫃) 2013 Container Throughput ('000 TEUs)
1. 上海 Shanghai	33 617
2. 新加坡 Singapore	32 579
3. 深圳 Shenzhen	23 278
4. 香港 Hong Kong	22 352
5. 釜山 Busan	17 686
6. 寧波-舟山 Ningbo-Zhoushan	17 351
7. 青島 Qingdao	15 520
8. 廣州 Guangzhou	15 309
9. 杜拜 Dubai	13 641
10. 天津 Tianjin	13 010

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未來發展趨勢 (III)

Future Development Trend (III)

- 內地航運市場迅速擴張，對航運服務需求殷切。中國旗船的總噸位達 4 000 萬噸，新造船總噸位仍以每年5-10%的速度增加。

The Mainland's shipping market is expanding rapidly, generating huge demand for maritime services. The gross tonnage of China-flagged ships now amounts to 40 million tons, and the gross tonnage of new vessels is still expanding at a rate of about 5-10% annually.

		世界 the World	中國 China	韓國 South Korea	日本 Japan
2013年造船完工量 Completion in 2013	總噸位 GT (萬噸 10 000 tons)	10 757	4 335	3 336	2 468
	比例 share (%)	100	40.3	31.0	22.9
2013年手持訂單量 Existing orders in 2013	總噸位 GT (萬噸 10 000 tons)	28 430	13 010	7 641	5 443
	比例 share (%)	100	45.8	26.9	19.1
2013年新接訂單量 New orders in 2013	總噸位 GT (萬噸 10 000 tons)	14 477	6 884	4 419	2 260
	比例 share (%)	100	47.6	30.5	15.6

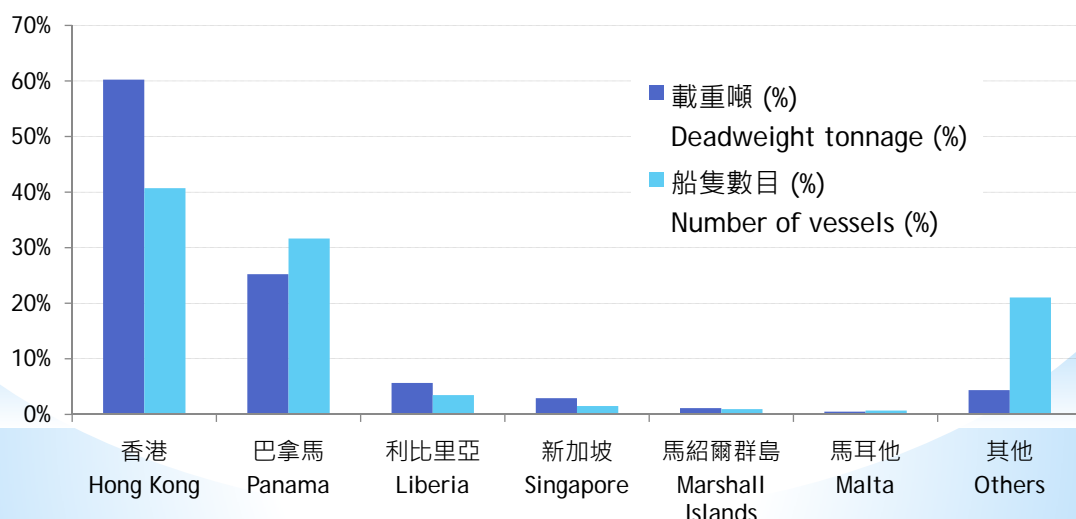
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“十三五” 規劃的工作方向 - 發展航運服務業 Direction of Work under “13.5” Planning - develop maritime services

- 吸引更多船舶到香港註冊
Attract more quality ships to register in Hong Kong

中資船舶掛國外船旗分布

Distribution of Chinese-owned vessels with foreign flags



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“十三五” 規劃的工作方向 - 發展航運服務業

Direction of Work under “13.5” Planning - develop maritime services

- 鼓勵內地船舶企業到香港營運
Encourage more Mainland shipping lines to establish operations in Hong Kong

世界首五位船隊規模 World's top 5 fleets
(1000 載重噸位以上的船舶 Vessels with deadweight tonnage over 1000 tons)

目前，內地對外貿易的貨物僅有 20% 是由內地的船隊運送。

At present, only 20% of the Mainland's international trade is shipped by domestic shipping lines.

國家/地區 Country/Region	載重噸位 (百萬噸) Deadweight tonnage (million tons)	船隻數量 Number of vessels
希臘 Greece	244.9 (15.2%)	3 695 (7.8%)
日本 Japan	223.8 (13.9%)	3 991 (8.5%)
中國 China	190.1 (11.8%)	5 313 (11.3%)
德國 Germany	125.8 (7.8%)	3 833 (8.1%)
南韓 South Korea	75.1 (4.7%)	1 576 (3.3%)
世界總計 World total	1 613.8 (100%)	47 122 (100%)

資料來源：聯合國“2013海運評述”

Source: “Review of Maritime Transport 2013” published by United Nations

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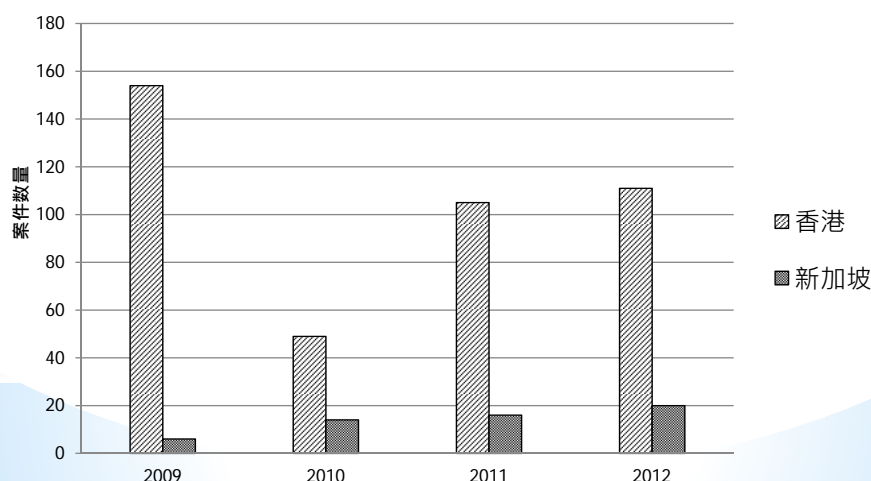
“十三五” 規劃的工作方向 - 發展航運服務業

Direction of Work under “13.5” Planning - develop maritime services

- 鼓勵內地企業使用香港的航運服務，例如海事仲裁
Encourage more usage of Hong Kong's maritime service, for instance, maritime arbitration

香港與新加坡海事仲裁案件比較

Comparison of the arbitration cases handled by Hong Kong and Singapore



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“十三五” 規劃的工作方向 - 發展航運服務業

Direction of Work under “13.5” Planning - develop maritime services

香港國際航運中心的地位建基於我們高效率的港口。展望未來，要更上一層樓，我們要充分發揮“一國”與“兩制”的獨特優勢，鞏固和提升香港的海運服務業；按此在“十三五”規劃下，我們的目標是：

Hong Kong's status as an international shipping centre is based on our highly efficient port. Looking forward, we will leverage on our unique “One Country” and “Two Systems” advantage, and enhance our maritime services with a view to achieving further strength. Under “13.5” Planning, we aim to:

進一步吸引各地航運業界視香港為亞洲區的首選據點，加強香港作為內地航運企業「走出去」的跳板，致力匯聚多元化高增值的航運服務，樹立香港作為聯繫國家與世界航運業的平臺。

Further attract the global maritime sector to use Hong Kong as the preferred base for business operation in Asia, strengthen Hong Kong's position as the springboard for maritime companies in the Mainland to go global, strive to provide a diversity of high-value added maritime services and thereby establishing Hong Kong as the platform for the nation's as well as the world's maritime industry.



有關香港作為中外文化藝術交流中心的建議

Proposal on developing Hong Kong as an international cultural and arts exchange hub

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一. 建議

Proposal

- 在「十三五」規劃中將香港定位為中外文化藝術交流中心

To position Hong Kong as an international cultural and arts exchange hub in the National 13th Five-Year Plan



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二. 具體政策措施 Specific Policy Measures

- 在香港推行更多大型的、涵蓋香港、中華地區及世界多個地方的國際文化藝術活動
To organise more large scale international cultural and arts events in Hong Kong, with the participation of Hong Kong, Chinese regions and other places
- 推動及促成在港演出的內地及香港的優秀節目其後巡迴外地的機會
To promote and facilitate the outbound tour of the best programmes from the Mainland and Hong Kong after they have been presented in Hong Kong
- 藉著西九文化區的戲曲中心落成的契機，將香港定位為區域性的卓越戲曲藝術中心
To position Hong Kong as a prime xiqu art hub in the region, capitalizing on the completion of the Xiqu Centre in the West Kowloon Cultural District



二. 具體政策措施 Specific Policy Measures

- 加強與世界各地（包括內地）博物館的合作，在香港舉辦大型展覽和相關的學術及專業交流活動，以突顯香港在促進中外文化藝術交流的角色
To strengthen collaboration with museums elsewhere (including in the Mainland) in organizing blockbuster exhibitions and related activities for academic and professional exchanges in Hong Kong, so as to highlight Hong Kong's role in promoting international cultural and arts exchanges
- 發展香港成為區域內的藝術行政管理培訓及專業交流中心，鞏固其文化交流中心的地位，這亦有助內地的藝術管理模式與國際接軌
To develop Hong Kong as a regional hub for art administration training and professional exchanges so as to strengthen its cultural exchange centre status. It will also be conducive to the development of art management in the Mainland in line with international practices



三. 建議對國家的貢獻

The Proposal's Contribution to the Country

- 建議可加強香港利用本身的優越條件、國際視野和網絡以及西九文化區的設施去促進中華文化在國際間的影響力，從而長遠達到提升國家軟實力的策略性目標

The Proposal can facilitate the better use of Hong Kong's strengths, international perspective and networks as well as the facilities of the West Kowloon Cultural District to promote the impact of Chinese culture in the world, so that the strategic objective of enhancing China's soft power can be achieved in the long run



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四. 建議對香港特區未來發展的重要性

The Proposal's Importance to the Future Development of HKSAR

- 將香港定位為中外文化藝術交流中心，可加強香港在世界文化版圖中的獨特角色和地位，有利我們發展文化產業，同時可對國家的文化發展策略作出貢獻

To position Hong Kong as an international cultural and arts exchange hub can strengthen Hong Kong's unique role and status in the cultural map of the world, which is beneficial to the development of our cultural industries and facilitates our contribution to China's cultural development strategy

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謝謝
Thank you



律政司的建議 –
在國家第13個5年計劃內明確表示支持
香港特區作為亞太區國際法律
及解決爭議服務中心

DoJ's Proposal –
To state expressly in the
13th National Five Year Plan
Support for
Hong Kong's Position as an International
Legal Services and Dispute Resolution
Centre in Asia Pacific Region

#410001 v3

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(1) 法治與經濟發展的關係 **Co-relation between Rule of Law and** **Economic Development**

- 法治和法律配套與經濟發展、營商環境及競爭力均有
著密切關係 **Close relationship between (a) rule of
law and legal infrastructure and (b) business
environment and competitiveness**
- 抓緊在亞太區內發展國際法律和解決爭議服務的黃金
機會 **Golden opportunity to further develop int'l
legal and dispute resolution services in the
region**

(2) 香港的優勢 Attributes of Hong Kong

- 豐富的國際經驗處理複雜的跨境法律問題 – **Rich int'l experience and capability of handling complicated cross-border legal matters**
- 政府及法院支持採用仲裁和調解 – **A supportive government and judiciary**
- 國際級的仲裁中心 – **World class arbitration institutions**
- 完善的法律和解決爭議服務的法律框架 – **A good legal framework for legal and dispute resolution services**

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Department of Justice 67

(3) 建議對香港的裨益 Proposal's Benefits to Hong Kong

- 有助提升香港的競爭力，有利香港鞏固國際金融、商貿中心的地位 – **Enhances HK's competitiveness, strengthens HK's position as an int'l financial and commercial centre**
- 彰顯「一國兩制」在香港得到成功落實 – **Manifestation of the successful implementation of the "One Country Two Systems" principle**

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(3) 建議對香港的裨益 (續)

Proposal's Benefits to Hong Kong (cont'd)

- 為香港創造就業機會及帶來實質經濟收益 – **Creates job opportunities and brings about tangible economic benefits**
- 令法律和相關界別增加對國家尊重法治的信心 – **Highlight to Hong Kong lawyers Mainland's respect for the rule of law in Hong Kong; enhance mutual understanding and build up trust in the long run**

(4) 符合國家整體利益

Consistent with Overall Interests of the Mainland

- 經濟東移，應把握亞太區對法律及解決爭議服務的需求 – **Proactive with the demand for int'l legal & dispute resolution services in the Asia Pacific as economic centre of gravity moves to the East**
- 加強國家參與有關國際法律、仲裁等機構的事務 – **Enhances Mainland China's participation in affairs of int'l legal, arbitration and related bodies**
- 有助國家企業「走出去」 – **Helps enterprises in the Mainland to "go global"**

國家「十三五」規劃 National 13th Five-Year Plan

改善珠三角區域空氣質素的建議 Proposals on Improving Air Quality in the Pearl River Delta

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建議

Proposals

把以下政策納入國家「十三五」規劃，深化區域空氣污染聯防聯控：

Include the following policies in National “13-5” Plan to deepen regional air pollution co-prevention and co-control

(一) 確立珠三角地區四種主要空氣污染物2020年的減排目標

Confirm the 2020 emission reduction targets for the four major air pollutants in the Pearl River Delta (PRD) region

(二) 在珠三角港口推動遠洋船泊岸轉油，探討把珠三角水域劃定為「排放控制區」的可行性

Promote ocean-going vessels berthing at PRD ports switching to cleaner fuel; and explore feasibility on designating PRD waters as an Emission Control Area

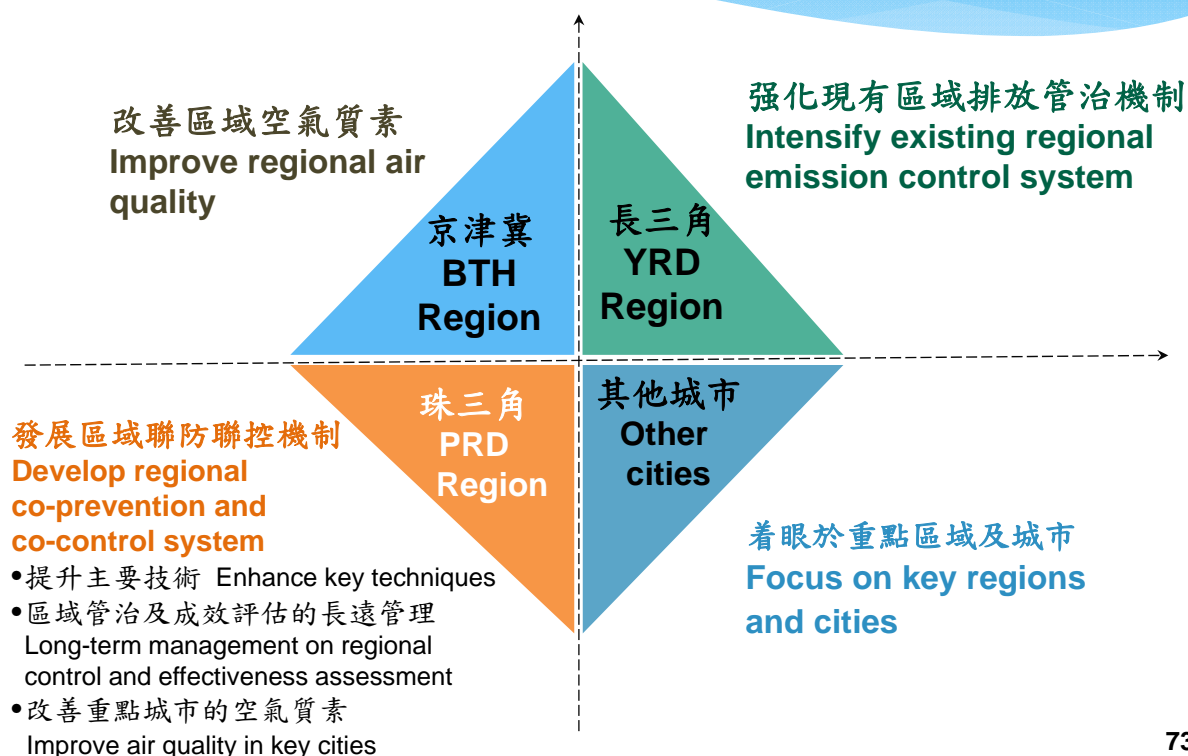
(三) 進一步加強區域清潔生產合作

Strengthen regional cooperation in promoting cleaner production with a new Cleaner Production Partnership Programme (CP3)

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推動區域空氣污染聯防聯控

Promote regional air pollution co-prevention and co-control



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政策建議

Policy Proposals

(一) 確立珠三角地區2020年的減排目標, 持續改善區域空氣質素

Confirm the 2020 emission reduction targets for the PRD region to further improve regional air quality

- 粵港雙方早前通過了2015年的減排目標, 並且就2020年訂定減排幅度。雙方將在2016年進行中期回顧, 檢視減排工作的進度, 同時確立2020年減排目標

The two governments endorsed earlier the emission reduction targets for 2015 and the emission reduction ranges for 2020; and will assess the reduction progress made and finalise the reduction targets for 2020 during a review in 2016

- 除確立「十三五」期間減排目標, 粵港正在探討共同開展空氣污染預警合作, 優化珠江三角洲區域空氣監測網絡, 及啟動珠江三角洲區域大氣微細懸浮粒子(PM_{2.5}) 研究, 以深化區域空氣污染聯防聯控

In addition to emission reduction targets, the two sides have been exploring cooperation in air pollution forecasting, enhancing the PRD Regional Air Quality Monitoring Network, and commencing a joint study on fine suspended particulates (PM_{2.5}) for the PRD region, to strengthen cooperation in regional air pollution co-prevention and co-control

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政策建議

Policy Proposals

(二) 推動遠洋船泊岸轉油, 探討把珠三角水域劃定為「排放控制區」的可行性

Promote ocean-going vessels berthing at PRD ports switching to cleaner fuel, explore feasibility on designating the PRD waters as an Emission Control Area

- 環境局將向立法會提交新規例, 要求遠洋輪船在香港泊岸後轉用低硫柴油, 減少二氧化硫和粒子排放

To reduce sulphur dioxide and particulate emissions, the Environment Bureau (ENB) will introduce a regulation to the Legislative Council to require ocean-going vessels switching to low sulphur diesel while berthing in Hong Kong

- 與廣東省探討共同在珠三角港口推動遠洋船泊岸轉油, 及開展探討把珠三角水域劃定為「排放控制區」的可行性

To work with Guangdong to promote ocean-going vessels switching to cleaner fuel while berthing at PRD ports, and to explore the feasibility on designating the PRD waters as an Emission Control Area



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政策建議

Policy Proposals

(三) 粵港進一步推動區內工廠實行清潔生產

Continue to cooperate with Guangdong in promoting cleaner production to factories in the PRD region

- 環境局在2008年聯同廣東省經信委開展的「清潔生產伙伴計劃」協助港資工廠實行清潔生產, 節能減排

ENB launched the CP3 with Guangdong Economic and Information Commission in 2008 to facilitate HK-owned factories to adopt cleaner production so as to reduce emissions and enhance energy efficiency

- 伙伴計劃批准了2 300多個資助項目及舉辦了340多個認知及技術推廣活動, 同時為地區帶來可觀的環境及經濟效益

CP3 has approved over 2 300 funding projects and organised over 340 awareness and technology promotion activities. It has also brought about significant environmental and economic benefits to the region

- 與廣東省探討在未來擴展「清潔生產伙伴計劃」

To explore with Guangdong to step up CP3 in future



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效益（一）

Benefits (1)

- 持續改善香港和珠三角地區的空气質素，協助國家在「十三五」期間降低空氣污染

Implementation of the proposals would help improve the air quality in Hong Kong and the PRD region, and contribute to reducing air pollution in the National 13-5 Plan period

- 配合國務院頒布的「大氣污染防治十條措施」，包括設立珠三角區域空氣污染物聯防聯控機制、降低珠三角PM_{2.5}濃度水平

Dovetail with the Ten Air Pollution Prevention and Control Measures in the Mainland promulgated by the State Council, including establishing joint mechanism to prevent and control air pollutant emissions in the PRD region, and reducing the concentration level of PM_{2.5} in the region

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效益（二）

Benefits (2)

- 推動遠洋船轉油，可協助包括香港特區的珠三角區域成為國際上主要的綠色港口群，保持珠三角港口可持續發展

Promoting ocean-going vessels switching to cleaner fuel would help the PRD region, including Hong Kong, become one of the green port clusters and maintain sustained development

- 與廣東省探討在未來擴展「清潔生產伙伴計劃」，有助改善區域環境，並推動香港及廣東省環境技術服務業的發展

Exploring with Guangdong to step up CP3 in future would help improve the environment and promote the development of environmental services sector in Hong Kong and Guangdong

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