



澳門 2020

—未來 20 年遠景目標與發展策略


Macau

2020

—THE LONG TERM
OBJECTIVES
AND
DEVELOPMENT
STRATEGIES
IN 20 YEARS

澳門發展策略研究中心
Macao Development Strategy Research Centre
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Macao Association of Economic Sciences

聯合課題組
The Joint Research Group

The background of the cover is a complex collage. It features a grayscale photograph of the Macau Tower on the left, a grid-like architectural drawing of a city block in the upper center, a perspective drawing of a modern building with horizontal slats on the right, and a stylized, high-contrast line drawing of a person's face in the bottom left corner. The overall aesthetic is a blend of urban photography and architectural planning.

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As the export quota will soon be cancelled, where does Macau's textile industry go from here?



東西文化交匯有助於進一步發展觀光旅遊業

A convergence of the East and the West, Macau can further develop tourism.



議事亭前地是遊客必到之地

Largo do Senado is a popular spot for tourists

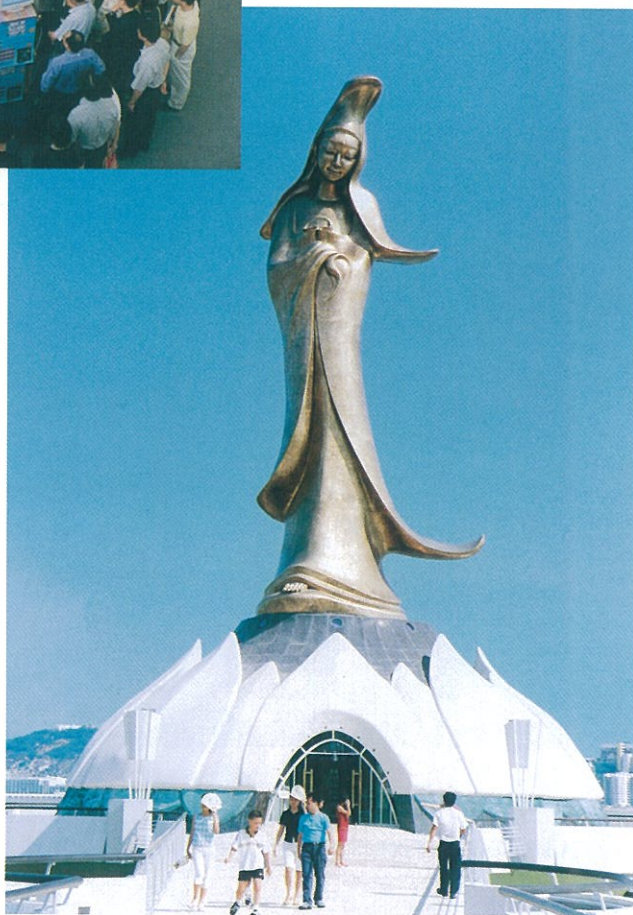


2000 年 5 月份舉行的
"尤里卡計劃(會合)亞洲"

"Eureka (Meets) Asia"
held in May 2000

造型別緻的澳門觀音成為
新口岸新填海區的新景點

A beautiful Chinese
goddess statue has become
a landmark of NAPE



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澳門國際機場有條件繼續拓展服務空間
Macau's international airport has its space to expand



水深不足的深水港是澳門發揮國際自由港功能的一大制約
A shallow port poses a constraint for Macau to perform its functions as free trade port



澳門與新加坡兩地簽署航空合作協議書

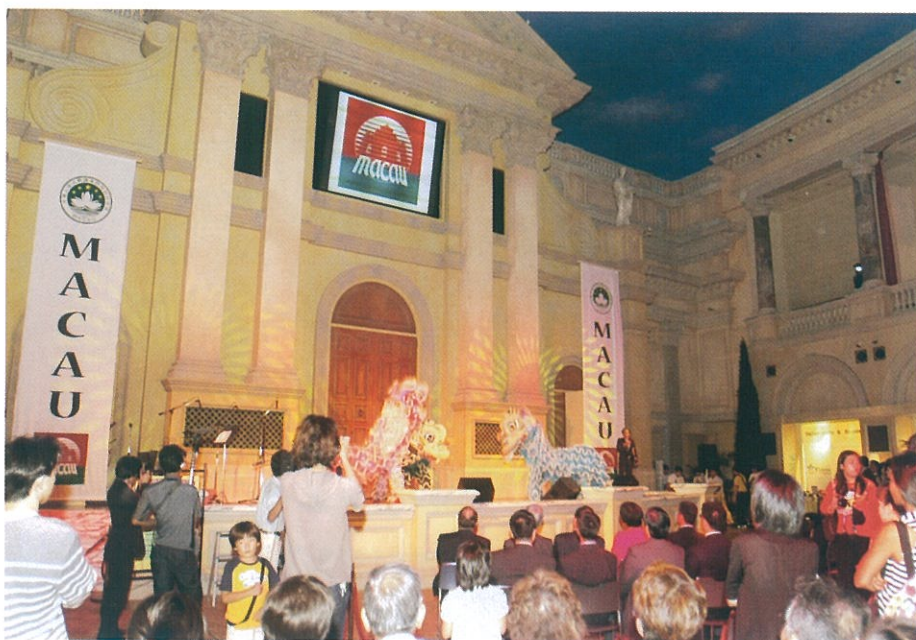
Aviation agreement between Macau and Singapore is signed



澳門與珠海兩地官員就加強雙方間的經貿合作進行討論

Officials of Macau and Zhuhai discuss how to strengthen the economic cooperation

澳門2020—未來20年遠景目標與發展策略



推廣澳門——把友誼傳出去，把效益帶回來。

Promote Macau — extend our friendship and enjoy economic returns

VIII



澳門的明天令人鼓舞

Tomorrow's Macau is promising

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序 言

澳門特別行政區行政長官 何厚鏞

澳門正式重回偉大祖國懷抱已近一年，這是鄧小平“一國兩制”理論指引下澳門特別行政區開始運行的第一年，也是澳門經濟在經歷一場前所未有衰退打擊下得以固本培元、逐步復甦的一年，同時，更是特區居民行使當家作主民主權利後團結奮戰、自強不息，重新安排自己命運、重新開拓發展空間的一年。為了使澳門特區經濟盡快全面復甦，重上發展的快車路，為了以良好發展成果展示“一國兩制”巨大威力，特區政府首當其衝地積極作出了系列探索和開拓，特區各界居民則意氣風發地參與了這場決定命運的新實踐。這裏，可以毫不誇大地說，澳門特區一年來雖因種種條件限制，暫無辦法取得令人驚奇的發展成果，但全澳上下共同努力所奠定的基礎是紮實的，它必將對澳門新一輪的全面持續發展和進步產生肯定性的深遠影響。

要加速發展、要協調發展，要在發展中追求到盡可能的高速度、高質量，重要一環是要認真真去探索現今全球經濟發展的共同性規律和澳門特殊社會歷史條件形成的微型經濟的特殊發展規律，以便在日漸複雜的內外形勢中依靠科學頭腦、依靠發達智慧來主宰命運、來自決前程，作出合理定位，科學地尋找出適宜自身特點的相關發展路向。令人欣喜的是，在澳門特區，社會各界對探索發展規律的重視達到了前所未有的高度，一支既有一定經濟實力又有開拓意識的年輕企業家隊伍正在集結形成過程中，而初具規模的學術研究群體已經開始展現在人們面前。由澳門發展策略研究中心和澳門經濟學會所共同完成的大型研究報告《澳門2020——未來20年遠景目標與發展策略》，便是又一生動例證。這是由民間發起、由民間自行組織研究力量，經過半年有多的反覆論證、諮詢後所完成的一項重要研究成果。閱讀這份報告，人們將看到不少頗具啟迪的新思路、新構想、新觀點、新探索。相信，這份大部頭

研究成果不僅對政府未來施政將帶來有益的啟迪，而且對各界人士重樹發展信心，重建光輝前景亦將帶來影響深遠的促進。為此，我衷心感謝兩個民間研究機構富有創意的努力，熱烈地祝賀這份研究報告順利完成並在關鍵性時刻同讀者見面。

澳門是我們大家世代代開發經營的一片樂土，澳門回歸後，制度上的完善是我們賴以發展、加速發展和協調發展的重要保證。我們對今日的澳門無限熱愛，我們對明日的澳門更加信心百倍。面對當前這個千載難逢的歷史機遇，依靠偉大祖國的關心、支持，依靠我們勤勞的雙手，依靠我們不斷提升的智慧，我們定能開創一個真正屬於澳門人、屬於偉大祖國的穩定、發展、繁榮的嶄新時代。

2000年12月 時值回歸一週年前夕

一. 前言

“澳門明天更美好！”這是一句澳門居民和關心澳門的人所非常熟悉的口號。這是絕對正確的命題，也是一個主語可以替換的命題，不僅回歸後的澳門明天更美好，包括台灣在內的全中國明天更美好，全世界明天也會更美好，理論上不僅澳門，而且每個國家、每個民族，其明天都會更美好。但這既“美”又“好”的明天怎樣才能變成現實，通向美好明天的路由誰去開拓，怎樣去開拓呢？理性的回答是十分清楚的，這通向美好明天的路要由澳門人自己不屈不撓地、義無反顧地去開拓，不僅靠兩隻勤奮的手，更要靠發達的大腦和無窮的智慧去開拓。

“人無遠慮，必有近憂”，更何況，澳門近年經濟不景的陰霾仍未遠離它去，故此，無論社會整體還是個別社會成員對自身處境和未來發展都應有科學務實的前瞻性觀察和設想，這對法理上自行主宰命運的特區政府及其廣大居民更形重要。

經過四任行政長官和特區政府積極施政並帶動全澳居民全面開拓，實行“一國兩制”的澳門特別行政區 20 年後該是什麼樣子？澳門居民心目中有沒有一個較為明確清晰的追求目標？澳門居民對實施“一國兩制”方針的特別行政區的明天所持信心指標是否足夠？全國人民對未來澳門發展前景怎麼看？國際社會對這個新生的澳門特別行政區前景又怎麼看？這其中涉及一個極具挑戰性和現實性的問題——美夢不可以隨意編織，但奮鬥目標一定要有，理想一定要追求。依靠科學的頭腦、理性的思維、實事求是的探索和持之以恆的奮鬥，真正取得當家作主地位、自行主宰命運的特區居民，有一百個理由寫好一部“澳人治澳”、高度自治的嶄新歷史，而沒有半個理由繼續隨波逐流，任由風浪巔波。澳門的發展空間相對狹小，但此時此刻發展遠未達到飽和狀態，而且也永遠不存在所謂的“絕對飽和”。“千里之行，始於足下”，在確定發展目標之後，我們要一步緊似一步，紮紮實實，認認真真去努力、去探索、去開拓，以高度的責任感和緊迫感做好各自應該承擔的工作。

基於上述理解和認識，我們經多次反覆調查、論證、諮詢、交流，草擬了這份建議書，實實在在地意在拋磚引玉，以期把全澳各界人士的聰明才智進一步集中、匯集並加以昇華，使之逐步形成推動澳門未來發展的共識，並藉以真正開創一部屬於澳門居民自己、令子孫後代引以為榮的發展史。

二. 條件的設定

- 2.1 在未來20年內澳門及鄰近地區不發生人力因素不可控制的自然災害，亦不出現全球性深度化經濟大衰退。
- 2.2 海峽兩岸走向最後和平統一過程中，外來因素的直接干預得以排除，主要領導人非理性化思維得以克服，以雙贏模式結束持續半個多世紀的對立狀態。
- 2.3 “一國兩制”原則和《澳門特別行政區基本法》基本上得到不折不扣地有效實施。
- 2.4 澳門特別行政區第一任至第四任行政長官和政府推行首尾銜接、互不脫節的穩定經濟財政政策。
- 2.5 澳門特別行政區居民中的多數，包括永久性居民和非永久性居民、中國居民和非中國公民、老居民和新居民、財富佔有者和普通勞動者、知識富有者和知識不足者、利益團體成員和非利益團體成員，在澳門發展路向和策略上取得基本的共識，由社會共識推向社會共進。

2.6 法治意識逐步真正地建立起來：政府施政中不存在與現代法治社會不相容的盲點、暗點和明顯的不規範行為；民間社團、各行業經營者和其他社會成員，對自由競爭、公平競爭的競賽規則能夠主動適應並力求成為競爭強者。

2.7 自由市場經濟體系中確保生產要素，特別是新經濟時代新型生產要素，包括信息、智力得以充分發揮的公平、公正、公開、民主、廉潔等原則，成為澳門社會各領域運行的基本遵循原則。

2.8 在上述條件不能得到充分滿足的情況下，澳門的發展無疑將存在頗大的變數，但願這種憂慮是多餘的。

三. 發展目標的設計

3.1 主體目標

通過 20 年的共同努力，使澳門發展成為全中國和亞太地區中一個實施“一國兩制”原則的中等規模全方位開放國際性“明星”城市。

3.2 2020 年，這個國際性明星城市應達到下述主要標誌。

3.2.1 主要經濟與社會發展指標接近或達到當時國際發達國家、地區平均水平，其中經濟總量和人均 GDP 按 2000 年實際水平以恆值計算增長 1.5－2 倍以上，按當時市值增長至 3－3.5 倍以上，即在人口增加不致失控（如 20 年後上限不超過 60 萬），年均經濟實質增長達到 6% 或以上（參見附表 1－4）；社會結構基本上進入中產階級為主體的協調發展階段。縮窄社

會收入差距，使堅尼系數保持在0.3—0.4的水平。

3.2.2 在粵港澳組成的珠江三角洲區域合作體系中發揮積極的牽引、拉動作用。

3.2.3 在亞太和全球具有較高知名度，擁有較為密集的國際聯繫網絡，並成為區域性發展的導航標。

3.2.4 在旅遊博彩、綜合服務、信息傳遞、離岸金融、高等教育、文化傳播等領域，形成具明顯自身特色和優勢的運行體系。經調整、適應化，以高附加值產品和某些新興產品研發為主導的製造業具有一定的國際競爭優勢。

3.2.5 擁有適當規模財政儲備，社會福利趨於完善，具較強的抗災能力、應變能力和自我發展能力。

3.2.6 政治民主化在“穩健發展”基礎上取得積極成果，以專業人士為主體的中產階級的政治參與，在廣度和深度上達到與其地位、作用相適應的水平。

3.3 界定國際性“明星”城市的可行指標

3.3.1 屬於國家、地區發展的牽引車，其產業結構合理化程度、勞動生產率、創新開發能力、管理水平均達到國際上或區域性一流指標。

3.3.2 處於國際高增長、高發展的核心區位，其基礎設施發達，信息傳遞快捷，堪稱國際性或區際性運行樞紐。

3.3.3 擁有廣泛國際聯繫網絡，其知名度、形象備受認同，人流、物流、信息流較為密集，是國際經貿、文化交流的轉運中心。

3.3.4 經濟發展進入良型運行態勢，符合可持續發展原則，在爭取較高經濟增長率的同時，保持低通貨膨脹率、低勞動失業率。

3.3.5 社會協調發展、公平競爭、新聞自由、治安良好、法制完善、族群和諧，具有寬鬆祥和的發展環境。

3.3.6 在若干經濟領域具有明顯的自身特色和發展優勢並形成較強的國際競爭力。

3.4 中等規模的界定

- 3.4.1 人口一般在 50－100 萬之間，澳門 20 年後在面積擴充不足一倍情況下人口總量發展上限可期達到 60 萬人。
- 3.4.2 擁有適量的面積，以澳門實際觀察其基本面積可望達到 35－40 平方公里或以上。
- 3.4.3 經濟輻射力、吸納力超出同樣人口、面積規模的鄰近城市。
- 3.4.4 成為鄰近國際級主要經濟中心的合理配角和分流站。
- 3.4.5 “中等”主要是從基本資源的基數來界定，而非意味着其發展層次屬中等水平，作為國際認同的“明星”型城市，其社會發展與經濟發展當然均應居國際一流平均發達水平。

3.5 發展成果與發展思路之間存在很大相關性

- 3.5.1 無論國際經驗還是中國經驗都有力地證明，要想取得較好發展成果，不及時轉換觀念、調整發展思路是不可想像的。
- 3.5.2 轉換觀念與調整發展思路是一個不斷推進的認識優化過程，也是一個決策的科學化過程。它應成為特區政府和整個社會經常關注的焦點之一。
- 3.5.3 積極與消極、開放與封閉、創新與守舊其實既是一詞之差，又是本質之別。積極、開放、創新，每個人都會講，但會講未必會作，作也有真作、假作之分。消極、封閉、守舊，沒人願意承認，但在現實生活裏卻大有人在，表面上的積極、開放、創新與實質上的消極、封閉、守舊並存，或某些事情上的積極、開放、創新與另一些事情上的消極、封閉、守舊並存，往往會構成某一群體、某一企業、某一經營者的混合體。
- 3.5.4 一般來講，發展的成功是多種相關因素綜合作用的結果。但在同樣的環境推動或制約下卻有人成功，有人失敗；在高峰期如此，在低谷期也不例

外。因而，內部因素的調動、主觀因素的調動應居優先強調的課題。

3.5.5 對於澳門的未來發展，恐怕至少會有兩個以上的思路可供選擇：(1)穩定型；(2)轉換型；(3)開拓型；(4)創新型。從保險系數上觀察， $(1) > (2) > (3) > (4)$ ；從實際效益觀察，將是 $(1) < (2) < (3) < (4)$ 。應該說，穩定型不一定完全不妥，創新型也未必完全正確。穩定型可能對某一時期重要，創新型可能在某一問題上決定大局，關鍵在於靈活運用的藝術。總的說來，但願澳門的發展走向以開拓型和創新型為主，穩定型與轉換型為輔；初期可堅持穩定型與轉換型思路，長遠上則宜堅持開拓型和創新型思路。

3.6 四屆特區政府施政期間經濟發展的可能走勢

3.6.1 首屆特區政府施政期間(2000—2005)

由於澳門特別行政區是在原澳葡政府長期管治所遺留下來的矛盾基礎上起步的，而特區成立時又適逢連續多年不景的低谷期，故首屆特區政府施政期間不得不在前一二年內付出較大代價收拾殘局、固本培元，經濟形勢全面好轉可能要發生在其施政的後三年，這後三年澳門經濟有望以較為適當的快節奏(譬如年均實質增長5—8%或以上)向前推進。因此，可以講，這一屆政府的功績將主要體現在全面奠基、初步建立財政儲備以及長遠發展路向、策略的調整上。

3.6.2 第二屆特區政府施政期間(2005—2010)

由於二十一世紀前十年國際經濟將有望繼續保持穩定發展，由於澳門特區經濟經前五年復甦、發展已具較穩定基礎，所以這五年將可能是澳門經濟保持以較快速度發展的階段，五年平均增長指標將可能大大超越前五年。特區政府公共行政改革有望取得實質性突破。當然，由於紡織品出口配額的取消，澳門製造業如果未能提前作好調整適應化，第二屆特區政府亦可能要再次面對經濟上的被動。

3.6.3 第三屆特區政府施政期間(2010—2015)

二十一世紀第二個十年的前五年，全球經濟發生周期性調整將不稀奇，但在周邊地區，特別是珠江三角洲率先基本實現現代化和香港邁向遠東和東亞最大的國際性大都會目標帶動下，加之特區發展已具新的基礎，運作應該逐步進入成熟階段，故澳門經濟依然有望保持較快發展速度與質量，進一步縮小與發達國家之間的差距。這期間，憂患意識、防範意識、自主意識、創新意識仍要擺在特區政府以及各界人士的頭腦中。

3.6.4 第四屆特區政府施政期間(2015—2020)

這一屆特區政府應該是在一個較好的起步點上起步的，經過積極地調整、修正原來的發展目標，有條件實現新的飛躍，從而進一步把澳門引向結構更合理、效益更突出的良性運行發展軌道上，並全面提升經濟發展與社會發展指標，令澳門順其自然地在亞太地區的明星城市名單上佔據一席之地。當然，20年之後，由於各種有利因素把握不到位，澳門被香港和鄰近地區拋得更遠的可能性亦非絕對可以排除，人們希望這種擔心是多餘的。

四. 澳門發展的外部環境分析

4.1 2020 年的全球經濟

在 21 世紀的首 20 年，世界經濟在全球化、信息化、網絡化、一體化推動下，將可能進入一個前所未有的穩定快速增長期，亞太、北美、歐盟都將取得新的驕人發展，國際經濟格局將產生新的深刻變化。以知識化、信息化為主要內涵的新經濟，其發展的主要動源和表現形式都將實現轉換，全球區域結構的比重將出現較大調整。新的科學發現和技術發明，特別是高科技的不斷創新及其產業化，將對世界發展和人類進步產生巨大而深刻的影響。

根據美國學者分析，新時代的“新經濟”具有下述四個最主要的特點：(1) 20世紀80年代以來在美國發生的信息產業革命有力地帶動了高技術主導產業的增長和產業結構的升級換代，極大地提高了勞動生產率，從而構成了持續9年有多的經濟增長的基礎。(2) 知識在這種新經濟中的作用大大增強。一些純粹的“知識產業”成為整個經濟持續增長的重要發動機。現在幾乎60%的美國工人是知識工人，80%的就業崗位是由知識密集型部門創造的。(3) 新經濟是以全球市場為導向的經濟。信息技術特別是互聯網使“地球村”越來越小。資本、生產、管理、商品、勞動力、信息和技術等在全球範圍跨國界流動。各國、各大企業間的經貿、技術聯繫與合作大大加強，同時競爭也趨於激烈。(4) 新經濟是以經濟周期淡化為特徵的經濟：一是周期的擴張期較長；二是衰退時期縮短，生產下降幅度較小；三是擴張期持續出現通脹率和失業率“雙低”的罕見現象；四是經濟擴張伴隨着企業投資的強勁增長。(註1)總之，由依賴資源、依賴投入的擴大、依賴有形產品和有形資產的增加，向依賴信息和智慧、依賴產出的擴大、依賴無形資產的增加轉移，是一個突出特點。

當前，一種基於互聯網，以交易雙方為主體，以銀行電子支付和結算為手段，以客戶數據為依托的全新商務模式——電子商貿（E-Commerce，或E-Business、E-Trade）正大行其道。1998年5月世界貿易組織132個成員國簽署了《關於電子商貿的宣言》，標誌着電子商貿時代的曙光業已出現。到2005年，發達國家電子商貿將可能由當前佔貿易總額的二成擴大到七成以上，成為貿易的主要形式，資訊科技的發展將全面改變人們的思維和生活方式。2020年的世界，對於大多數國家和地區的居民來說，將是多元化、快節奏、多選擇的活動空間。

在經濟全球化、信息化、網絡化、智能化的推動下，在高科技、高思維、高競爭、高效應的運行環境下，預期到2020年全球經濟將可能比2000年實質增

註1：轉引自李京文主編：《2000年中國經濟全景》，北京，國結出版社1999年11月版第4頁。

長1.5—2倍以上，而亞太地區將可能實質增長2.5—3倍以上。其中，到2010年，據世界銀行預測，中國、俄羅斯及其他國家(美國、歐盟、日本除外)佔全球經濟份額將會由12年前29.20%上升至42.30%(表5)。相信到2020年上述比例將會繼續上升。

4.2 二十年後的遠東和亞太地區

亞太經合組織(APEC)18個成員國共有人口22億以上，佔全球近半數，二十世紀九十年代中期，成員國總GDP已逾12萬億美元，區內貿易佔全球40%以上。以“四小龍”為龍頭的遠東地區和東盟國家在過去三十年間經濟發生了巨大變化，推行改革開放政策的中國社會主義市場經濟體系更取得舉世矚目的巨大飛躍。根據亞太經合組織(APEC)1994年發表的茂物宣言，到2020年亞太地區各國之間將全面實行貿易與投資的自由化。20年後，全球最大的自由貿易區將在亞太地區出現，上述兩大經濟體系的合成，將在全球經濟格局中佔據一個主要龍頭地位。隨着區內貿易自由化的實施，這個區域無論就發展速度還是發展質量都將躋身於全球領先地位。

以西太平洋沿岸各國為代表的亞太大區發展結果是令人震驚的。世界銀行十多年前的報告是這樣說的：“自從20世紀60年代，亞洲經濟的高增長速度是其他國家的兩倍還要多，是拉美國家的三倍左右，是非洲撒哈拉地區的五倍。其經濟的增長速度也明顯超過了世界工業水平和盛產石油的中東及北非地區。在1960年至1985年間，日本和亞洲“四小龍”的人均實際收入上升了四倍多，在東南亞和新興工業化國家也上升了兩倍多。”^(註2)兩三年前的金融風暴洗禮，令亞洲一些國家進入一個以強調質量和效益為標誌的發展新階段。20年過後，包括中國在內的這個地區勢將變成全球最大、最活躍的經濟中心區域之一的前景，是不需懷疑的。

註2：World Bank report, the East Asian Miracle: Economic Growth and Public Policy, Oxford University Press and the world Bank, 1993, P.2。

4.3 2020年的中國經濟

“中國只用了一代人的時間，取得了其他國家用幾個世紀才能取得的成就。在一個人口超過非洲和拉丁美洲人口總和的國家，這是我們這個時代最令人矚目的發展。”^(註3)

中國正在經歷從傳統的農業社會向工業社會、從傳統的計劃經濟體制向社會主義市場經濟體制的轉型，而“轉型的合力，產生了強大的漩渦和逆流，它們可能是破壞穩定的潛在因素，而且總是難以預測”。^(註4)但，人們有理由相信，隨着未來四個五年期分階段積極而務實的推進，當改革開放第二個二十年結束時，中國經濟將達到一個具標誌性意義的新水平，東部沿海部份省、市將率先進入中等發達經濟行列。根據國務院發展研究中心所進行的研究，中國經濟從2000年到2020年平均潛在增長速度可達7.3%左右。按不變價計算，2020年GDP將比2000年翻兩番多；按匯率計算，中國人均GDP將超過5,000美元，即相當於1997年世界人均水平，而GDP總量則可超過日本，僅次於美國和歐共體居世界第三；如果按購買力平價(PPP)計算，則GDP總量可能接近當時美國的水平^(註5)。到2020年，中國的出口佔世界總進口的比重將可能從目前的2.8%上升到8.6%，實增二倍以上，外貿佔GDP的比重約在30%左右，與發達國家通常的外貿依存度更為接近。正如江澤民先生在中共十五大報告所指出：“展望下個世紀，我們的目標是：第一個十年實現國民生產總值比2000年翻一番，使人民的小康生活更加富裕，形成比較完善的社會主義市場經濟體制；再經過十年的努力，到建黨100年時，使國民經濟更加發展，各項制度更加完善……”

註3：世界銀行《2020年的中國——新世紀的發展挑戰》，轉引自楊叔進：《中國：改革、發展與穩定》，中國發展出版社2000年1月版總序第1、2頁。

註4：世界銀行《2020年的中國——新世紀的發展挑戰》，轉引自楊叔進：《中國：改革、發展與穩定》，中國發展出版社2000年1月版總序第1、2頁。

註5：李善同等：《中國經濟增長前景》，見《澳門日報》，2000年4月26日，A4版。

根據中國科學院所作的相對保守的預測，到2020年，中國人均GDP仍將達到2,125美元(1990年不變價)，年均增長率在7.2%—4.9%之間，為保持可持續發展，應推行“控制人口、節約資源、保護環境、維持穩定、科學決策”的戰略(註6)。根據另一份題為《中國經濟增長的可持續性與制度變革》的研究報告，“中國經濟在今後20年內將繼續以平均超過6%的不含水份的真實增長速度發展。到2020年中國人均GDP達到目前中等收入國家平均水平時，中國將告別貧困”(註7)。國家計委經濟研究所的研究報告指出，“未來十五年，無論從供求因素看，還是從技術進步對經濟增長的貢獻來看，中國GDP應能夠實現7%或略高一點的中速增長。”(註8)

目前，中國電子商務正繼續以高幅遞增。據2000年初的最新統計，目前全國已有4萬家商業網站，今年網上交易額可達4,000萬美元，三年後將達38億美元，成為全球第二大網站市場。至2000年9月中國電話用戶總數突破2億戶，其中固定電話1.35億戶，移動電話6,500萬戶，網絡規模居世界第二位。預期到2003年移動電話將突破一億戶，其中30%將是網上用戶，到2010年用戶總數將突破2億戶，其中40—50%將是網上用戶。2000年第一季度中國互聯網用戶已達到1,000萬戶，預期五年之內中國將成為僅次於美國的全球居第二的互聯網(Internet)用戶群。到2020年，中國網站數、網民數都將位居全球領先地位。

中共十五屆五中全會指出：“進入新世紀，繼續推進現代化建設、完成祖國統一、維護世界和平與促進共同發展，是必須抓好的三大任務”。近期，“要把發展作為主題，把經濟調整作為主線，把改革開放和科技進步作為動力，把提高人民生活水平作為根本出發點”。(註9)隨着改革開放的深入，隨着有中國特色社

註6：中國科學院：《2000中國可持續發展戰略報告》第8頁。

註7：《澳門日報》，2000年6月1日，A4版。

註8：香港《文匯報》，2000年6月10日，A1版。

註9：《澳門日報》，2000年10月12日，A4版。

會主義市場經濟體制的完善，隨着由2000年開始西部大開發的啟動，隨着加入世界貿易組織後潛力的合理調動，到2020年，中國將有可能形成世紀級強國的雛型，為在二十一世紀中基本實現社會主義現代化打下鞏固基礎。如海峽兩岸得以通過新理念、新智慧順利實現“一國兩制”原則下的和平統一，那麼，大陸、港澳台共同組成的大中華經濟體將是全球最具影響力的經濟實體之一。

4.4 大珠江三角洲經濟帶的隆起

4.4.1 大珠江三角洲

大珠江三角洲通常指包括港澳和以廣州為中心的珠江三角洲的總稱，面積為4.27萬平方公里，其中珠江三角洲為4.16萬平方公里，香港為1,084平方公里，澳門為23.6平方公里；人口共2,760萬，其中珠江三角洲為2,056萬，香港為660萬，澳門為43萬。由三部份組成的大珠江三角洲區域經濟，或可稱之為粵港澳經濟大三角。歷史上，三地之間自然形成資源共享、互通有無、平等互利的經濟合作關係，改革開放20多年來更進一步發展成一個合作層次不斷提升的較為緊密型的區域經濟整體。隨着港澳先後回歸，在進入新世紀後，三地經濟面臨着全面擴大互惠互利、互補優勢的合作態勢，並進一步提升合作效益，使之成為遠東和亞太地區的一個主要增長源的光輝前景。

4.4.2 珠江三角洲

通常指廣東省九個市四十個縣(縣級市、區)所組成的珠江下游廣闊地區，範圍包括廣州、深圳、珠海、東莞、中山、佛山、江門、惠州(惠城區、惠陽、惠東、博羅等縣)、肇慶(端州區、鼎湖區、四會、高要縣)。該區是全國吸引外資數量最集中的區域，也是吸納外地勞工最多的區域之一。區內產業結構的合理化快速提升，交通通訊發達，部份高新科技產業

和服務產業已具較高起點，城鄉差別迅速消除，城市化水平不斷提高。這個區域與長江三角洲一起已成為全國經濟發展的兩大箭頭。根據現有規劃，廣東珠江三角洲一些基礎較好的城市將有望分別於2005—2010年間逐步提前實現基本現代化的目標，到2020年，由珠江三角洲帶動的廣東全省將有望提升到當時中等發達國家的平均水平或接近平均水平。其中省會廣州將通過“外向帶動”、“科技興市”、“可持續發展”三大戰略，推進經濟體制和經濟增長方式的根本性改變，建成具工業基地和交通中心、商業中心、金融中心、科技中心、信息中心、教育中心、文化中心、旅遊中心地位的現代化中心城市，全面發揮其龍頭帶動、示範帶頭、綜合服務、吸納創新的作用，可望於21世紀的第一個十年內率先進入中等發達經濟行列。

4.4.3 同澳門水陸相連、唇齒相依的珠海，在已經實現歷史性跨越的基礎上，通過堅持可持續發展、科教興市、深入改革開放、依法治市等基本經驗，通過高新產業開發區、珠海保稅區、臨港工業區、橫琴經濟開發區、外向型海洋開發區等五大經濟功能區的建設，預期將在2007年率先基本實現社會主義現代化的目標，其未來發展定位是建成以信息技術為龍頭的高新技術產業基地、有較強吸引力的產學研基地、高附加值的產品出口創匯基地和現代化區域性中心城市(註10)。

4.5 香港特別行政區的發展定位

4.5.1 香港的發展前景廣闊

“香港的遠景目標，不僅是要保持中國主要城市之一的地位，更要成為亞洲首要國際都會。”兩者相輔相成。“香港若能成為真正的國際大都

註10：《珠海特區報》2000年11月2日，A1版。

會，當可對中國的發展進程發揮重大作用；另一方面，香港作為中國的主要城市之一，亦享有獨特優勢，可進一步鞏固本身的國際地位。”(註11)這個雙功能定位決定於下列七個主要因素：

4.5.1.1 成為名實相符的全球性金融及商業服務中心

要確保金融及商業服務的規管制度和技術設施維持世界水平。不斷促進新的金融產品和服務的發展。確保基本制度配合香港作為區內首要金融中心的發展步伐。要不斷創新，並且維持超卓的效率。

4.5.1.2 要繼續吸引跨國企業在港設立地區總部

要改善香港吸引外來投資者的條件，包括採用國際最佳作業方式，以及制定和推行目標明確的策略；要積極向內地主要企業，特別是高科技公司宣傳，吸引他們來港設立國際業務總部；必須正視不少新興企業，特別是資訊服務業，正逐步利用電腦經營業務，因而不需要實地設立地區總部的轉變。

4.5.1.3 旅遊業仍是香港經濟重要一環

迪士尼主題公園及濕地自然保護公園等新旅遊景點的發展計劃相繼落實，商務旅遊市場的擴展，內地遊客激增的趨勢，以及作為旅客前往中國以至亞洲其他地區旅遊的首站，預期香港旅遊業會迅速增長，長遠來說，可望繼續推動整體經濟發展。

4.5.1.4 成為發達的資訊服務中心

必須設法在電子出版、電子教育、多媒體、新聞及商業電訊、電腦軟件開發等範疇加強實力。繼續吸引商界投資大型重點項目。繼續推動資訊服務業的發展，並促進電訊業的競爭。必須繼續提供價廉質優的電訊服務。吸引全球主要的通訊及傳媒機構來港拓展業務，以便把香港發展為電訊中心，提供多元化而又高增值的服務。

4.5.1.5 成為華南和區內其他地方的創新及科技中心

要發展以知識為本的經濟，不單要提供必需的基建配套設施，也要培養創新及科技的文化，創造有利營商的環境，藉以扶植一些應用和提升科技和創新的公司。香港必須設法加強與內地的合作。在致力發展資訊科技之餘，亦須探討在其他範疇的發展機會，包括把新科技應用在傳統工業上。

4.5.1.6 保持國際貿易中心、國際運輸樞紐的地位，成為區內物流服務中心。

香港一直是舉足輕重的國際貿易中心。必須繼續擴展商業貿易，在內地及其他新興市場開拓商機，並積極發展與貿易有關的服務，例如物流、法律和會計服務。全球貿易的增長，特別是珠江三角洲的發展，大大提高了香港作為國際運輸樞紐的地位。香港要成為國際航空樞紐，便必須不斷物色新的航空伙伴，磋商航空協議。香港是個極為繁忙的貨櫃港。貨櫃業應着重提供高增值服務。香港作為“國際航運中心”，要改善和推廣香港船舶註冊處的服務，拓展船體保險市場，以及與內地加強航運聯繫。香港亦須因應電子商貿長遠的發展趨勢，從速建立切合需要的基礎設施，開發技術，並訂立有關的法例和制度。

4.5.1.7 通過豐富創作及文化活動加強競爭力和提升市民的生活質素

香港電影、電視、音樂，以及其他娛樂和設計事業表現優秀，但仍須設法推廣本土文化，以及鼓勵藝術創作，尤其是培養青年人的藝術創作力。必須增撥資源，鼓勵多元化和高質素的創作及文化活動，並嚴厲執法，保障創作文化等行業的知識產權。

4.5.2 港澳兩個特別行政區未來發展具很大相關性

實行“一國兩制”是中國的首創，在國際上沒有先例。港澳雖然規模大小不同、發展層次有異、法律體系不同，但同為“一國兩制”示範區，同樣保留原有社會、經濟制度50年不變，同為國際自由港，且兩地咫尺相隔，合作基礎廣泛，因此，通過生產要素的合理交換，進一步取得互補互惠、共同受益的空間極大。

五. 澳門向何處去

5.1 澳門既是一個強勢經濟體系，又是一個弱勢經濟體系，強中有弱，弱中有強；既是一個經濟達到不低水準的地區，又是一個發展存在不少變數的地區。

作為一個產業結構極為特殊的微型經濟體系，澳門總體上講，面臨着經濟體制自由化、經濟發展國際化、經濟合作區域一體化、產業結構知識密集化、城市功能服務化、旅遊博彩特色化、製造業精品化、金融工具多元化、經濟活動信息化、市場競爭人才化的發展趨勢。故此，強調合理定位，強調科學設計發展路向就十分重要，也十分迫切。

5.2 澳門未來經濟的主要支撐點

5.2.1 旅遊博彩中心

澳門將依據基本法的授權，在維護社會整體利益前提下自行制訂旅遊娛樂業的政策。通過積極果斷、合理有序地開放賭權，全面引入競爭機制，古老的博彩業將注入現代化、科技化、信息化的活力。作為中國版圖上唯一興賭的地區，澳門將逐步成為亞太區最主要的現代化科技主導型博彩基地。作為綜合性旅遊城市，澳門的觀光之旅、會議之旅、消閒之旅亦將以其適度收費和優良服務而提高形象，形成規模，成為名符其實的經濟龍頭。

5.2.2 多元中介服務中心

經過特區成立後二十年的努力，澳門應力爭成為信息流、資金流、物流的集匯站，其多元化、綜合性中介服務基地將成為其對外競爭優勢之一。原有的金融、保險、法律、會計、諮詢、教育等行業將會全面擴充並

達到國際一流水準，電子商務、出版、廣告、形象設計、包裝設計亦可望拓展空間，甚至為周邊地區提供優質服務。地產亦可衝出低谷重獲新生，成為特區活躍的產業之一。

5.2.3 生產開發仍應佔據一席之地

通過新一輪調整轉型、適應化，澳門具本地特色的製造業有望重建起來，一是自行研制開發適路產品，二是同大陸各地互補合作進行轉化開發，三是引進歐盟合作夥伴共同開發。產品應集中在小批量、高附加值系列，包括化粧品、時裝、中藥、綠色食品、高檔玩具、精品、現代旅遊用品，以及資訊產品等等。只要取向合理、措施得體，逐步實現科研成果產業化，帶動佔98%以上的中小企業逐步實現轉型，儘管難度較大，但仍不失為一個基本取向。

5.2.4 資訊科技有望冒升

在向21世紀新經濟形態轉化過程中，積極尋求探索發展適宜本國、本地區條件和特點的高新產業，建立新的增長點，擴大經濟發展的有效支撐點，推行可持續發展戰略，已成為當今各國普遍關注的一個焦點。澳門特區政府、企業家和有識之士都應加速轉換觀念，調整思路，不失時機地進行論證，全面部署，藉助鄰近地區發展高新產業的優勢，挖掘本地潛在優勢，迎接時代挑戰。積極培植本地新一代產業，尤其在資訊產業方面，並非無路可行。在澳門環境、體制、融資、區位均具優勢，最大制約是科技人才，而人才也具兩面性，人才既難求又不難求，只要政策對頭，絕對有條件緩解這一制約。大有大作、小有小作，只要積極進取，既要適應全球共同性發展規律，又實實在在地從自身實際出發，若干年後通過建立若干個高新科技或適用科技孵化器或支撐點，實行科研成果的嫁接、轉移和產業化，培育一個全新的經濟活動領域並非是不可能的。

5.3 有利條件與機會

作為強勢經濟，澳門發展的有利條件很多，機會不少，包括：

5.3.1 擁有一個高穩定度的社會，平穩過渡實現政權交接。廣大居民對國家主權的認受程度較高，民族凝聚力也較強，這是新一輪發展的重要資源和強勢。

5.3.2 “一國兩制”原則與基本法保障的優勢是長期有效的，澳門特區尤其受到中央和全國各地的破格關注、支持。

5.3.3 已取得相當不低的發展成果，1995年起已被國際組織列為高人均收入的國家、地區名單之內，在全球微型經濟中可進入第一梯隊。

5.3.4 對國際市場的應變能力、創新能力，特別是年輕一代企業家的開拓精神，年輕一代公職人員和廣大市民的上進心、自強不息奮鬥精神，均不容低估。

5.3.5 宗教、語言、民族交融歷史較長，兼容並蓄，取長補短，社會寬容度、兼容度較高。

5.3.6 擁有廣闊的特定海外聯繫紐帶：一是海外數千萬華僑華裔中相當部份與澳門存在深厚淵源，這是一種效應持久的網絡優勢；二是分佈四面八方數以萬計的土生人士亦可適當加以利用。

5.3.7 國際自由港、低稅制的體制仍是不可取代的優勢，依然可資開發利用。

5.3.8 聯繫與緩解兩岸關係的特定作用可以進一步發揮，這是澳門現階段和未來一段長時期內的一個重要優勢和機會。

5.3.9 位於全球高增長帶中段的有利位置，前有亞洲“四小龍”和東盟各國作為借鑑，後有祖國大陸的龐大腹地可資全面依靠。

5.3.10 聯繫歐盟仍不失為傳統優勢，回歸後澳門由於歷史傳統因素完全可以繼續扮演一個活躍在祖國大陸與歐盟之間的重要媒體、中介、助推器的角色。

5.3.11 長遠觀察，在發展與葡語國家關係方面，同樣具有很大潛質。在下一世

紀，巴西有望成為拉美經濟的龍頭，莫桑比克、安哥拉等國在非洲大陸的地位亦會更形重要，發展與這些國家的關係，也是需要珍惜、重視的一個方面。

5.4 有待揚長避短、重點突破的制約

作為弱勢經濟，澳門發展的難點和制約絕不容掉以輕心，其中：

- 5.4.1 從1993年經濟下滑至今已七八年，從1996年出現負增長至今也已四年。連續多年負增長打擊的陰影會長期存在，不僅影響投資預期而且也影響消費心理。
- 5.4.2 規模過小，資源不足，不易形成規模效應，土地規模和人口規模難以取得根本性解決。
- 5.4.3 欠缺大型深水港，令澳門喪失發展現代海運業的機會，自由港功能的發揮大打折扣。
- 5.4.4 對外綜合性現代交通聯繫網絡尚未形成，令澳門難以通過自由港的優勢成為現代物流轉運交換中心。
- 5.4.5 居民文化素質不高的問題有待長期關注。根據官方1999年一季發表的《就業調查》，在全澳約20萬名就業人口中，文化程度在初中以下者高達74.8%，這在資訊產業蓬勃發展的新經濟時代尤其是一項極為突出的制約。
- 5.4.6 傳統運行模式具正負兩面效應。傳統與現代並非對立概念，在保留、發揚傳統前提下加速現代化進程是一個正確選擇。在人們的觀念裏有時把傳統與保守劃上等號，這是不公平的，傳統社團代表人物並非一定保守，非傳統社團的代表人物並非一定不保守，不擇手段一味追求金錢、權慾滿足的人任何時代都會有，但始終要被社會發展所淘汰。在澳門，恐怕沒人敢講自己是絕對的現代先進生產力的代表，由於特定環境的局限都會程度不同

地具有保守的一面；有人在這方面有保守性，有人在那方面有保守性；有人可能保守一面輕一點，有人可能重一點。因此，在當前，設法突破保守思維的束縛則具有普遍意義。

5.5 有待促進並加速達致的幾項目標

- 5.5.1 擁有一個高效、廉潔、問責的政府及依法行政、合理用權、服務意識強烈的公務員隊伍。
- 5.5.2 擁有一個被國際社會，特別是鄰近國家、地區廣泛認同的良好形象，不僅有完備的法律、法規保障，而且執法部門與廣大市民都有自覺的法治意識。
- 5.5.3 擁有一個眼界開闊、同心協力、自強不息的社會群體：不僅有小家觀念，還要有大家觀念；不僅善於創新開拓，而且善於合作共事；不僅困難時肯於共度時艱，而且順利時樂於與人分享成果。
- 5.5.4 擁有一個具現代企業家精神、敢於在新經濟大潮中迎浪而進的現代經營創業者隊伍。
- 5.5.5 擁有一個好的積極可行的發展目標和發展思路，堅持探索發展規律應成為社會性的共識，而不是少數人手中奇貨可居的專利。

5.6 認真解決好幾個關係

5.6.1 經濟發展與社會發展的同步與協調

同經濟發展已經達到一定基礎一樣，澳門的人文發展指數(HDI)亦達到相當不低的發展成果，1995、1996、1997年分別為0.86、0.86、0.85，但事實上澳門的教育水平、收入水平、社會保障水平、醫療健康水平、文化道德水平均處於同上述指數不相稱的位置，居民的現代意識更相

對滯後，極待進一步重視與協調。

5.6.2 一業為主與相對多元化的關係

近年的經濟不景令不少人對澳門未來發展的信心打了折扣，澳門的博彩業是一大優勢，需要因勢利導、繼續改善，但從長遠觀察，單一經濟或一業為主的思路是不可取的。儘管澳門發展博彩旅遊之外的產業難度和風險會更大些，但採取相對多元化的發展路向絕對是利大於弊的選擇。

5.6.3 基礎薄弱與合理嫁接的關係

澳門既有多重相對優勢，又有不少相對劣勢，基礎薄弱和人才不足是後者中的兩個較為突出的難點，但憑借有利因素的發揮，澳門亦有條件吸納越來越多的外地企業和科研機構把某些成熟的研究成果轉移過來進行商業開發。

5.6.4 外部條件與內部條件的關係

要加快發展就要充份利用好一切可資利用的內部和外部條件，寄望於外部條件得到不斷完善是必要的，但無論政府和民間都需要把基點牢固地建立在內部條件的合理有效利用之上，這是一個不容動搖的信念。

5.6.5 經濟措施與非經濟措施的關係

發展經濟當然要緊緊依靠對基本經濟規律的正確認識和合理利用，依靠見諸於法律的經濟性措施的推動，但事實證明，有時非經濟性措施亦有極大的作用，包括提升居民文化道德水平、鞏固居民對發展前景的信心指標等等，都是不可偏廢的。

5.6.6 依靠體力與依靠智力的關係

在進入發展新型知識經濟時代，勞動者的體力與智力的價值相應發生變化。一方面要為高素質的專業人才的加速成長創造有利環境，另一方面又要為境外有條件前來澳門發展的高級專業人才的進入開放綠色通道。但在承認智力勞動日趨重要的同時，不可有意無意輕視體力勞動者，社會要盡可能多地為年輕一代體力勞動者的“轉型”提供條件。

5.6.7 政府施政與民間開拓的關係

在經濟不景打擊下，社會各個層面都是受害者，對於行使高度自治權的特區政府，人們寄以極大期望，提出了很高的要求，這是正常的。但搞好本地經濟，必須靠來自政府的指引與來自民間的開拓所形成的合力方可奏效。

5.6.8 傳統理念與新經濟意識的關係

在澳門這樣特定的環境，每行每業、每家每戶都要考慮傳統理念的繼承，又要面對新經濟意識的衝擊，勤儉、刻苦、誠信、合作這類傳統美德永遠都不會過時，但對新經濟意識、新發展思潮的主流方向和基本內涵以及表現特點也要給予足夠的關注，主動適應方可立於不敗之地。

5.6.9 發展的無限性與認識的有限性的關係

對於任何一個國度、任何一個經濟體系而言，其發展空間都是永無止境的，永遠沒有發展的絕對飽和，有的只是對其認識的有限性而已，因而我們要設法突破認識的有限性，不斷擴大對發展客觀規律的自覺適應性。

六. 若干發展策略

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6.1 策略之一——出好手中幾張牌

6.1.1 博彩產業牌

博彩是澳門經濟的一根重要命脈，也是特區政府手中的一張大牌。《澳門基本法》第118條規定：“澳門特別行政區根據本地整體利益自行制定旅遊娛樂業的政策”。這表明，澳門博彩業不但可以發展，而且可以更好地發展，並旨在維護本地整體利益，而且特區政府在制定相關政策方面擁有完全決策權。由於過去博彩業採用專營法律制度，而實踐證明專營制

有便於政府管理一面，同時亦有因缺乏必要競爭所導致的因循守舊、不思進取，或盈利轉移、妄顧社會整體利益的一面。面臨即將到期的博彩專營權，面對要求擴大開放度的強烈民意，特區政府如何決斷是一大考驗，今後全面加強對這一行業的有效監管也同樣重要。按一般推測，博彩業積極而有序地引入競爭機制，不僅將使博彩業本身增加活力、提高效益，從而有助增加政府財政收入，而且也將產生巨大的連鎖帶動效應，帶動澳門經濟迅速進入新的增長周期。開放博彩業應堅持三大原則：一是遵循基本法的授權，二是回應澳門社會整體利益，三是使博彩業迅速提升至國際先進水平並辦出澳門特色。由於博彩業的特殊重要性，出好手中的這一張牌對整體經濟發展是至為重要的。

6.1.2 特區特事特辦牌

特區是在原澳葡長期管治並遺留大量社會、經濟問題的基礎上建立的，解決原有問題要有個過程，解決各類新出現問題同樣要有個過程。但，有中央政府的授權、有基本法的保障，特區政府有必要、有條件採取全新的開拓型思路，在“特”字上作足文章，充分利用特區在國際領域可以利用的廣闊空間，建立起新型的國際合作關係和聯繫網絡，同時，以社會整體利益為出發點，全面建立為民、利民、便民的服務意識，突破框框、大膽創新，及時拓展特區新型的運行傳統。

6.1.3 微型經濟牌

澳門是典型的微型經濟體系，“對於微型經濟來講，其規模微型，但效益可以不微型；其資源局限性很高，但目光可以盯住國際市場；其優勢各自不同，但不可陷入盲目性；其制約不容忽視，但關鍵在於自強不息、自立自主精神的發揚；其人才可能呈現不足，但公平競爭和創新意識可以推動人盡其才、物盡其用。總之，地方小或人口少並非一定與發展構成正相關。既然小就在‘小’字上作文章，既然微型就要微得精緻、微得濃縮、

微得高純度、微得高知識層次、微得受人重視與尊重。”(註12)當前，應設法盤活生產要素存量，並擴大其增量，但前者更為重要；在新一輪發展過程中要高增長、高質量並重，提高發展質量與提高生活質量並重。

6.1.4 文化特色牌

作為東西文化交流中心，澳門的文化極具特色，要善於開發、合理開發，在開發中保護，在保護中開發。澳門本身就是一座大博物館，既是中國文化博物館，又是歐洲文化博物館。澳門作為傳統東西文化交匯點，有條件向聯合國教科文組織申請“世界文化遺產”名銜。如能全面加以規劃，結合舊市區功能的調整和新功能區的設立，可以把整個城市搞成高格調、高效益、深內涵的多功能、多主題文化旅遊服務中心。如在新馬路及與其交匯的營地大街、十月初五街、草堆街、福隆新街、司打口區及原賭船廣場搞成名牌購物、特色餐飲、中西文化表演區，由大三巴牌坊、大炮台經大三巴街、賣草地至板樟堂街搞成古文化綜合服務區，在新口岸填海區文化中心、政權交接場地、觀音雕像及宋玉生公園搞成會議、展覽及現代中西文化綜合服務區，同時對孫中山、鄭觀應、賈梅士等中外歷史名人活動的遺址、遺物充分利用開發，在不同市區要分門別類加以科學規劃，增設雕塑、畫廊、花壇、草地和步行區段，擴充景點區及購物、飲食、展覽、表演、消閒設施，以期盡快發展成文化內涵豐富的不同旅遊主題功能區。同時應加快對南灣湖進行配套工程，使之盡快形成效益，成為新興旅遊、購物、文化消閒區。

6.2 策略之二——借力、借勢，正確推進區域合作

6.2.1 全面推進與以廣州為中心的珠江三角洲之間的平等互利合作。

要提倡合理定位、靈活走位、正確就位。首先要擺正位置，既為鄰近地區服務又從中全面借力、借勢。澳門的發展受環境局限嚴重，這就要不

註12：楊允中：《微型經濟：定位與發展》第36頁。

斷提升區域合作意識，揚長避短，善於把珠江三角洲優勢，如廉價工源、交通通訊網絡、高教培訓、高新產業、旅遊資源以及快速成長的資訊產業，加以合理利用，補充自己先天之不足。

6.2.2 澳門與珠海是一對天生合作夥伴，兩地互補優勢、共同受益的空間極大，全面擴大兩地在基礎設施、旅遊、商貿、高新產業、人才培訓等領域方向一致的合作，對兩地都是成功發展的關鍵所在。堅持“資源合理調配、產業互動發展、利益互惠共享”原則，符合兩地居民的共同願望。

6.2.2.1 強化澳珠兩地之間互補優勢的合作意識，盡快選定突破口和支撐點。兩地共同聯手開發橫琴島應成為急中之急，重中之重。如橫琴得到“特區中的特區”的地位，使所有權和管理權脫離，兩地全面接軌、特特聯合，將對兩地的發展與合作產生深遠影響，其前景不可限量。兩地在保稅區和出口加工區以及高新產業開發區的合作均應設法取得突破。

6.2.2.2 珠海正密鑼緊鼓策劃發展成高等教育城，這對澳門年輕的高等教育同樣既是挑戰又是機遇，如研究到位、管理提升，並合理互補，辦出澳門特色，兩地高教產業將有望形成一個綜合優勢。

6.2.2.3 澳門與珠海口岸之間合作與接軌應引起兩地的共同重視。由於澳門是“一國兩制”的載體、兩地分別設卡檢查是必要的，但應盡量簡化手續，降低查關標準，為兩地之間人流、物流、信息流的自由傳遞積極創造條件。

6.2.3 積極發展港澳合作，主動當好配角。

香港的重要性是有目共睹的，一水之隔的港澳兩地具有全面發展合作的歷史、地理、社會、制度等多重淵源，關鍵是要善於“走位”，合理發揮，主動靠攏，作好兩地間資源、技術、人才的分流和補充。

6.2.4 全面推進澳門與台灣之間的合作。

澳門是孫中山事業的起步點，具有孫中山優勢，又是保持原有資本主義制度 50 年不變的第二個特別行政區，同台灣合作已有一定基礎，今後更加要按“一國兩制”原則合理定位，主動打出手中牌。

6.2.5 適當借用日本、南韓、新加坡等發達國家的資金、科技、信息資源和管理經驗。

日本、南韓、新加坡都具有各自不同的經濟、技術優勢，澳門可以按基本法的授權以“中國澳門”名義，主動發展同上述國家的全面聯繫，來充實自己的對外關係網絡。

6.2.6 拓展與東南亞及其他亞洲地區的區域互補合作。

日益擴大並加強一體化的東盟各國，在APEC中佔據重要地位。由於距離相對較近，又有一定的合作基礎，加強澳門與東盟之間的經貿合作同樣不應忽視。

6.3 策略之三——抓住歐盟，打通葡語世界

6.3.1 澳門與歐盟之間具有傳統聯繫紐帶，歐盟對澳門的特定地位一向比較重視，“對於歐盟，澳門將長期發揮比香港更大的作用”^(註13)，雙方在經貿、人員往來、語言、宗教、文化、藝術等多重領域存在良好合作基礎，應及時加以鞏固利用並設法擴充合作空間。

6.3.2 葡語世界擁有十多個國家、地區，澳門與他們之間有一種先天性聯繫優勢。面積、人口佔拉美二分之一的巴西更是潛質優厚的發展中國家，從速與其建立全面穩定的合作關係，應成為澳門的一個戰略性選擇。

6.4 策略之四——抓住提高國際競爭力的關鍵環節

6.4.1 “未來的競爭是人才的競爭，是全民素質的競爭”^(註14)。因此，在構思提高國際競爭力過程中，首要關注點應集中在全面有效提升居民素質上。在

註13：See European Commission: *The EU and Macau: Beyond 2000*, COM (1999) 484 final.

註14：江澤民同美國記者談話，2000年5月18日《人民日報》(海外版)。

競爭時代、競爭環境，要用膽識和智慧參與競爭；在法治社會、法治環境，要敢於並善於與別人站在平等起跑線上進行較量。

6.4.2 工商企業家的觀念再造

澳門幾十年來依靠不止兩代人的拼搏取得了相當不低的發展成果。當前活躍在各領域的新一代企業家大都受到專上學位的系統專業訓練，無論就對國際市場的了解和對新經濟形態的適應，都是具有優勢的。但作為傳統型社會，至今為止，企業的管理仍偏重家族式，而且受多種因素特別是規模的局限，整體觀察，工商企業家中居優勢的仍是偏於保守的發展思路。當前形勢要求他們能主動地提升、轉換思路，全面提升競爭意識、風險意識、法制意識、創新意識和國際視野，培養有澳門地方特色的現代企業家精神，及時引入並推行新理念、新創意、新思維、新管理。憑澳門的環境與條件，爭取在本報告界定的時限內設法培育、形成一批有相當實力(如身價億元以上)、有現代經營頭腦的新一代企業家，將是未來澳門經濟的一大優勢。

6.4.3 專業人士的主動獻計獻策

澳門發展層次不高，各類專業人士擁有量有限，但部份年輕企業家本身就是專業人士，加上近二十年來已陸續集結一批以澳門為永久家園的專家學者，雖然他們在推動澳門經濟發展的客觀作用長期來未能得到全面認同與支持，但這是社會的一部份重要財富，在新形勢下的發揮空間越來越大。只要他們肯於主動獻計獻策，適當發揮，能夠適時貢獻一些真知灼見，得到社會的逐步認同將是時間性的問題。“基礎研究是人類文明的動力，是科技與經濟發展的源泉與後盾”(註15)。這個道理在澳門同樣會受到相應重視的。

註 15：江澤民同美國記者談話，2000年5月18日《人民日報》(海外版)。

6.4.4 各業勞動者提升競存價值

面對新一輪社會轉型，面對新經濟形態下資訊產業等現代科技主導型產業加速發展的挑戰，無論從就業還是從發展考慮，各行各業勞動者都要主動進行自我設計、自我開拓、不斷進取、精益求精，除基本技能外還要適當掌握外語、電腦、駕駛、維修等傍身知識和技能，實現自我升值與生存價值的再現。

6.4.5 提高全民文化、專業、道德素質

要全力爭取在未來二十年內通過多層次、多渠道的培訓、考核，逐步把現有中青年就業人口的文化提高到高級中學或以上程度，政府、民間團體和個人都要合作予以配合，同時要在教育制度和管理等方面認真加以改善，要按基本法的規定爭取在不太長的將來正式啟動義務教育並將義務教育年限延至十二年，防止中小學在校學生的不適當流失。還要通過立法、執法和自我約束來普遍提高居民的文化道德水平，使澳門民風純樸的社會傳統增加新內涵。

6.4.6 關注弱勢社會成員

要向國際“明星”城市目標進發，令社會在高效、有序、公平條件下運行，加大對弱勢社會成員關注的力度，降低社會結構最底層的比例，擴大社會財富佔有結構的合理性，是一個不容忽視的問題。雖然由於政府社會福利救濟和民間社會服務團體救濟面的擴大，澳門低收入家庭和居民的處境有所緩和，但近年嚴峻的經濟不景令這部份人的苦境百上加斤，同時也易衍生一些新的社會問題。牽涉低收入家庭成員、傷殘人士、弱智人士、工傷意外事件的受害家屬、犯罪分子家屬等的最低生活保障、子女教育、重返社會等，應作為一項系統社會工程來安排。

6.5 策略之五——強化英語普及與建立有助新經濟發展的嶄新環境相結合

6.5.1 努力普及英語，創造更佳中外交流環境。

英語作為全球第一流通語言，對經貿交流與文化交流都有其不可取代的突出地位。用英語交流溝通已成為國際化的重要標誌之一。過去澳葡時代，沒有條件全面加強英語訓練，但今後忽略英語就意味着失掉商機，沒有普遍的英語溝通環境，就不是國際化，應通過社會性的討論，令每個家庭都能全面提升對英語的認識與重視。當然，重視英語與適度發展葡語教育實質上並非絕對對立的事物，但如果要在英葡兩種語言中取捨，應鼓勵首選英語。

6.5.2 適應新經濟時代來臨，澳門在社會軟件建設方面應設法進一步改善。

6.5.2.1 制定寬鬆的優惠政策和清晰可行的法律規範，根據香港商業活動的程序和特點，主動作好商業法規的全面接軌。

6.5.2.2 應組織好政府公務人員，特別是位居領導層的公務員的系統培訓，提高政府的公共行政效率，改善服務質素。採取靈活而有效的措施，積極吸引資金、技術和各類緊缺人才的流入。在當前應考慮制定可行的人才延攬政策，如與資訊產業直接相關的專業中具碩士以上學位者，可隨時自由申請成為特區正式居民。

6.5.2.3 成立專責科技發展的專門機構，如科技發展局，並宜研究成立新型產業風險投資基金，催生和嫁接創新科技行業，提高現代金融的綜合服務功能。同時，要責成政府職能部門盡速就建立為外商服務、與國際全面接軌的國際學校和國際化的服務體系，提出決策意向。

6.5.2.4 利用澳門大學、生產力暨科技轉移中心等機構開設資訊科技及生化科技等研究開發中心，為澳門培養新經濟技術人才，並推動境內外適用科技成果的及時轉化。

6.6 策略之六——作好路氹填海區的科學規劃與國際招商

6.6.1 即將全面成陸的路氹填海區擁有相當澳門現有面積四分之一以上的可開發空間，全面開發後可建成一個集中主要商業活動的新市區，對於強化國際“明星”城市形象、分流澳門半島的功能意義重大。特區政府似應盡速就這項未來規劃的功能定位和發展目標進行公開招標，公開評選。確定可行發展目標時，盡早進行全球性的公開招商，全面啟動開發計劃。

6.6.2 配合這一計劃，亦應同步呼籲澳珠聯手開發橫琴島及推動廣珠準高速鐵路或輕便鐵路、高速公路的接駁計劃早日實現。

6.6.3 配合這一計劃，亦應積極就處於港澳間最短距離的路環——大嶼山之間興建跨海大橋事宜，進行務實性前期論證與協調。

6.7 策略之七——擴充高教產業並期形成新增長點

6.7.1 一項一舉兩得的事業

在現代發達國家幾乎都有一個相應發達的教育網絡，而以培養各類專業人才為宗旨的高等教育更是一項效益巨大的產業。美國等西方發達國家不僅在吸納外國留學生方面獲取可觀的經濟利益，而且又把其中出類拔萃者，源源不斷地補充到自己的專業人士大軍之中，同時也藉以不斷擴張自己的文化影響力。

6.7.2 澳門高等教育初具規模

現澳門設有澳門大學、理工學院、高等警校、旅遊高等學院、亞洲國際公開大學、澳門校際學院、澳門科技大學、鏡湖護理學院、澳門管理學院等高等學府，現有在校學生約10,000人。澳門本身人口只有43萬，應屆高中畢業生每年約為2,000人，其中八成以上均可選擇在本澳就讀大學學位課程，或者到大陸、台灣、海外留學。表面上看，似乎澳門發展高等

教育已無空間，但如果深一步觀察便可得出另外一種結論。一方面，澳門中小學學生流失率很高，經全社會共同努力，高中在校生有條件進一步擴充。另一方面，也要看到境外市場，現階段中國大陸也在積極擴展高等教育，但每年仍有約佔50%、數以百萬計的報考學生不能被錄取，如果澳門高等學校專業設置更合理一些，教學質量更高一些，形象更好一些，把鄰近省市適宜學生吸引過來幾千人甚至過萬人，是絕對有機會的。

6.7.3 向綜合性人才培訓基地方向發展

一是可以揚長避短，發展工商管理、旅遊經濟、社會科學、葡萄牙語言文學、葡萄牙法律、新聞傳意有自己優勢的專業；二是有針對性、有目的地增開新院系，如國際關係、拉丁語系、外國語言文學、歷史、港澳經濟、區域經濟，甚至文學理論、哲學、資訊科技、服裝設計、現代廣告設計等。同時，具備條件的有關機構、社團亦應嘗試舉辦人才培訓中心，開設各種高級學位課程和各式短期在職培訓證書課程。經過努力，爭取在十年左右辦成遠東以至亞太地區一個主要綜合性人才培訓開發基地，為本身和周邊國家、地區開發智能作出貢獻，這並非是不可能實現的夢想。

6.8 策略之八——全面扶持中小企業

6.8.1 澳門是典型的微型經濟體系，在為數約15,000個各類企業中，中小企業佔98%以上，它們過去為澳門的發展作出過重要貢獻，今後也是賴以依靠的重要基礎，但當前普遍受經濟不景打擊。

6.8.2 扶持中小企業對當前救市、對社會穩定、對減少失業等方面都有重要意義。首先可考慮推出的是適當減免稅項、向中小企業發放低息貸款(由政府補貼息差)、統一推進城市功能區的改造、集中培訓與資源共享等措施。政府宜建立專業部門予以跟進。

七. 確保新一輪經濟加速發展的若干相關因素

7.1 優化人口結構，全面樹立以人為本、知識本位、大科技觀的認識體系

7.1.1 高素質的人、高素質的社會群體是未來推動經濟與社會發展的主要資源，是參與國際競爭的前導性資源。在現代社會，作為社會成員的人、人的生活質量、人的平等機會、人的發揮空間，要受到社會性的關注與認同，也要令到每個社會成員都牢固地建立起“天生我才必有用”的信念，力爭變人為才，為社會多作貢獻，奉獻畢生聰明才智，也分享社會發展的一份成果。

7.1.2 人的價值的實現，主要靠自己的堅持不懈的開拓，靠對現代知識體系孜孜以求的探索，這是一個永無止境的追求過程，在資訊信息時代尤其不容放鬆；對任何成功人士不例外，對暫處逆境的人士也不例外。

7.1.3 人要作命運主人，要作時代主人，當然也要作認識現代科技，掌握現代科技的主人，這就要認識到人的大腦的利用度還很有限，每個人都可以因人而異、因勢利導地開發自己的潛質，對來勢洶洶的資訊大潮不能怨天尤人，不可以持抗拒、反感、排斥態度。總之，對科學、技術、知識的掌握也有相對性，只要量力而為、全力以赴，任何人都可以在現實生活中取得主動，拓展活動空間。

7.1.4 根據推算(見附表1、2、3、4)，如期望未來20年逐步達到中等發達國家平均水平，即達到3.2.1一節所列指標，則GDP年均增長應在6%或以上，人口總數控制在55—60萬幅度內，否則，如GDP年均增長在4.5%以下，而人口的機械性增長與自然增長在2.5%—3%或以上，則人均實質增長將會非常微小。故此，強調優化人口素質、優化人口結構，強調生產與服務領域的更大突破，勢在必行。

7.2 文化多樣性或多元文化並存是澳門一個特色，也是澳門值得重視開發的一項資源

在澳門，語言、宗教、藝術、飲食、民間習俗都有較深的內涵和較厚的底蘊，這種厚實的文化沉積層加上國際自由港的地位，導致今日的社會環境相對輕鬆、寬容，繼承傳統，兼及中外。在進入新世紀、面對新發展的客觀形勢下，這是增強全澳居民社會凝聚力、提高信心指標的一大有利因素。這個優勢不能輕視、不能丟失，而且要適時開發利用，發揚光大。

7.3 繼續發揮好傳統社團的基礎作用

7.3.1 在澳門，無論傳統的工商社團還是基層社團，在過去歲月裏都為本地的穩定發展作過不容抹殺的巨大貢獻。在迎接回歸的過渡期、在回歸後的治澳建澳初期，他們都發揮着社會基石的特殊作用。在進入發展新經濟的資訊時代，他們當然繼續擁有廣闊空間可以發揮，這是勿需懷疑的。

7.3.2 面對全新的歷史時代、面對不斷湧現的新興社團的競爭，傳統社團亦應及時、果斷地作出適應，作出回應：一方面應通過新陳代謝、吐故納新不斷補充新血液來完善管理，增加運行活力；另一方面，則應提倡公平競爭、提倡引入寬宏、寬容、寬鬆的合作共事機制，在澳人治澳、科學建澳的大前提、大原則下走向聯合、走向共同參與、共同發展。不要滿足於分餅機制，不要滿足於吃現成飯的老化、脫節思維。

7.4 培植、擴充中產階級隊伍宜成全社會共同關注焦點

7.4.1 現代各國，尤其是發達國家的經驗表明，由無產者佔大多數向中產階級佔大多數轉換是社會進步的必然結果；凡發達國家，其中產階級不僅數量日

益擴充，而且活力、作用亦受到全社會的普遍認同。現代概念的中產階級，關鍵主要不在於他們的經濟地位處於中間層面，而是在於他們作為以專業知識作為服務社會、參與競爭的資本，特別是他們之中創新意識強烈的一族對其所在企業、機構也好，對整個國家、地區也好都會帶來超常的突出貢獻。

7.4.2 中國改革開放二十多年來，一個新興的中產階級事實上已經悄然興起。在理論界歸納的十類致富人士中至少有六類是直接靠知識和專業技能來改變地位的：外資企業和國際機構的中方高級僱員，非金融機構和房地產開發機構的項目經理，部份企業承包者和技術入股者，著名影星、歌星、時裝模特兒、作家和運動員，少數律師、經理人、廣告人、會計師，一些經常講課、評審、鑑定的經濟學家和司局長級官員。少數違法經營者和腐敗官員是這個隊伍中的異數。相信20年後，以科技致富、智能致富的人將會逐漸由少數變成非少數，距共同富裕的目標會更為接近一大步。

7.4.3 澳門存不存在一個中產階級？今後他們會不會成為社會主導力量？這既是一個理論課題，又是一個極具現實意義的問題。在澳門構成大資產擁有者身份的人相信不多。在為數一萬五千個各類企業中，中小企業至少可佔98%以上，他們中間相當一部份是小本經營者，無論就財富佔有還是知識佔有，他們恐還不夠中產階級的層次。一部份具有專上學歷，具有專業人士資格的企業家，包括海外留學歸來的各類專業人士和第二代年輕企業家應具中產階級身份。至於分佈在社會各領域的律師、醫師、工程師、會計師、核數師、測量師、廣告設計師、畫家、大中學教師、歌星、編輯、記者以及專家學者和中高級公務員，以及自學成才者等等組成的中產階級，事實上不僅早已存在，而且日益活躍。雖然作為“知本家”，他們分佈在社會各層面，有的作為成功人士已被社會認同，但總體觀察，澳門的中產階級依然不夠成熟：一是數量仍弱，二是層次不高，三是活力不足，形象有限。經未來20年的演進，相信隨着澳門的經濟提升至一個更高形態的發

展水平，澳門的中產階級亦將逐步成為社會最活躍的層面，不僅在工商各界和政府部門居核心地位，在基層社團亦會成為主導力量。

7.5 認同創新意識的重要性

7.5.1 創新意味着資源的最佳配置與利用，創新意味着人類智慧的深層次調動，創新是提升國際競爭力的核心。離開創新，經濟發展形態的轉換就不能實現；離開創新，社會就不能發展。創新要體現在各個領域，從制度創新到技術創新，從管理創新到觀念創新，尤其是觀念創新，這是在競爭中取得優勢、保持優勢的前提。

7.5.2 創新並非標新立異、想入非非，而是在形勢挑戰面前順應客觀規律的一個必然反應。在人類已默然進入資訊社會、網絡時代的今天，還以唐·吉柯德式的虛無主義態度對待周邊事物，那是無濟於事的。正確態度是積極適應，即使不能全面適應也要局部適應；即使不能立竿見影，也要做到有所促進。

7.5.3 在澳門，要求各個生產、服務領域均通過創新實現突破是不實際的，但全面建立創新思維，提升創新意識卻是今後要着力關注、加速推進的一項歷史性任務。

7.6 合理解決生態平衡

7.6.1 要建立綠色環保型城市。經濟發展不應以損害環境為代價，不應以降低環境標準為基本要求。在澳門，海域的污染、大氣的污染、噪聲的污染、植被被破壞、綠化短缺都嚴重存在，應引起特區政府足夠重視，及時加大立法與執法力度。同時也要與周邊地區作好必要協調，以期通過共同努力保護好頭頂的藍天和腳下的綠地，讓子孫後代永遠生活在優質的環境中。

7.6.2 社會生態的失衡和破壞同樣應引起全社會的警惕、重視。按照綠色GDP理論，實質發展成果是每年GDP扣除自然部份的虛數(污染、環境退化等)和人文部份的虛數(疾病、失業、犯罪、人口失控、管理不善等)的結果。澳門每年因這兩個“虛數”所造成的損失為數驚人。在信息文明階段，人們的經濟觀、發展觀、自然觀、地區形象觀均應引入新取向、新標準。認真關注這個問題對當今的澳門，相信極具啟迪性，值得深思。為此，建議政府統計部門考慮把綠色GDP理論引入澳門。

區域形象與人類文明發展的關係

文明演進期 項目	採集——狩獵文明	農業文明	工業文明	信息文明
時段	公元前200萬年至 公元前1萬年	公元前1萬年至 公元18世紀中葉	18世紀中葉 至20世紀	今天——
社會發展	原始社會 人口較少	封建社會 人口發展	資本主義社會 + 社會主義社會； 人口大量增長	自然—經濟—社會 符合系統的協調持 續發展。在經濟增 長的同時，注意控 制人口、資源永續 利用和保護環境， 以提高人的生活質 量為目標。
經濟發展	追求生存 採食漁獵	自給型經濟 自給自足	市場經濟 + 計劃經濟， 追求GDP	
自然生態	自然資源利用程度 低；環境處於原始 狀態	資源利用不高； 環境基本協調	大量消耗不可再 生資源，環境嚴 重惡化	
自然觀	自然崇拜	天定勝人	人定勝天	人與自然和諧共存
環境問題	不存在	森林砍伐； 地力下降； 水土流失	從地區性公害到 全球性災難	全球性自然災難待 解決
地區形象特徵	群居、 體質力量、 野蠻	宗族、人口、道 德、權力、自然 環境、迷信	機器、自然資 源、科學技術、 交通、市場	信息、創意、人文 素質、環境保護、 可持續發展

本表參照周永章、夏怡《現階段區域可持續發展需要地區形象作配合》一文所列表(《可持續發展——粵港澳同合作》研討會論文集，2000年4月，第210頁)製成。

7.7 建立新一代中資企業

過去，中資企業在澳門經濟的一些主要領域中佔有不低的比重，其地位與作用舉足輕重。

無論是資產重組的國有企業，還是中資與本地資本合作、合營企業都面臨一個新的歷史使命：它們是直接與國際市場接軌的經營主體，要在追求經營效益的同時努力探索參與國際競爭的基本規律，它們也是實踐“一國兩制”方針、服務澳門特區의長期穩定發展的重要力量。但適應新時代新形勢，中資企業的概念亦應予重新界定。除傳統的中資企業外，特區應鼓勵內地各種形式的非國有企業來澳發展，並應逐步形成未來中資企業的主體。因此，中資企業亦要積極作好定位，發揮好功能角色，繼續開創與延續各自的發展史。

7.8 啟動社會智囊並盡快成立專業化的政策研究中心

7.8.1 建立現代諮詢制度，提高政府各種重大決策的科學性、務實性和前瞻性，是現代政治學和公共行政學所總結的重要經驗之一。

7.8.2 在澳門，一方面要全面總結並提升公共行政決策的正確性和執行政策的公平性，另一方面則要千方百計認真吸納民間智慧，有效地建立起社會智囊的啟動機制。

7.8.3 目前，特區政府所承接的原有澳葡政府架構中，機構雖有所精簡調整，但依然比較龐大，然而最有必要強化功能的部門——政策研究中心一類機構卻尚未正式建立，這點似應引起特區政府的進一步關注。

7.8.4 重建重組政府各種諮詢委員會是政府挖潛增值的一項積極措施，但這要與建立專業化的政策研究機構並舉方可發揮最大效益。

八. 結束語

這是一份思考澳門、思考未來的部份認識匯集，這是一份面對新世紀、新形勢的互補交流成果。這項工作從構思到行動，從起步到完善，不僅凝聚了澳門發展策略研究中心和澳門經濟學會領導層和會員的一點心血，而且也凝聚了所有關心澳門發展、關心發展質量的各界人士的寶貴心血。因而，假如它多少存在一些可取之處，應該說是一項名符其實的集體研究成果，同時也是行使當家作主民主權利、自行主宰命運的全澳居民參與“澳人治澳”、高度自治的一個行動顯示，是他們建立新文明、拓展新思維的新起點。

在未能完全掌握客觀發展規律前提下，人們只好“摸着石頭過河”。這份研究報告充其量只可以被看成是在岸邊投幾顆石子試試水深，它距離真正摸清水深、選好橫渡路線並到達彼岸，還有大量的事情要作、要闖、要開拓。衷心期望，此項活動能引發出越來越多的遠見卓識，並盡快形成共識，以期在澳門特區政府帶領之下，迅速走出低谷，堅持繼續攀登並不斷達到發展的新高峰。

最後，衷心感謝鼎力支持本項研究計劃的澳門特別行政區經濟財政司、澳門特別行政區運輸工務司、澳門發展與合作基金會、澳門基金會，感謝以各種有效形式提供支持與合作的特區政府新聞局及各有關部門和社會各界人士，感謝澳門各行各業為發展我們共同擁有的這塊寶地作出實質貢獻的朋友們。澳門的明天屬於我們大家，讓我們擁有一個值得驕傲的明天。

附表 1.1 澳門 GDP 增長預測 (2000 — 2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	442,857	524.09	119,062	533.72	121,252
2001	448,214	558.15	125,277	557.74	125,184
2002	453,571	594.43	131,834	582.84	129,263
2003	458,929	633.07	138,755	609.07	133,494
2004	464,286	674.22	146,059	636.47	137,882
2005	469,643	718.04	153,768	665.12	142,434
2006	475,000	764.72	161,906	695.05	147,155
2007	480,357	814.42	170,496	726.32	152,053
2008	485,714	867.36	179,565	759.01	157,133
2009	491,071	923.74	189,139	793.16	162,403
2010	496,429	983.78	199,247	828.86	167,870
2011	501,786	1,047.73	209,921	866.15	173,541
2012	507,143	1,115.83	221,191	905.13	179,424
2013	512,500	1,188.36	233,093	945.86	185,528
2014	517,857	1,265.60	245,663	988.43	191,861
2015	523,214	1,347.87	258,938	1,032.91	198,431
2016	528,571	1,435.48	272,960	1,079.39	205,248
2017	533,929	1,528.78	287,771	1,127.96	212,322
2018	539,286	1,628.16	303,417	1,178.72	219,661
2019	544,643	1,733.99	319,945	1,231.76	227,277
2020	550,000	1,846.69	337,406	1,287.19	235,180
GDP 累計增長 (對比2000年)		2.52倍	1.83倍	1.41倍	0.92倍

註：

1. 以 1999 年為計算基數，該年 GDP 按 1996 年不變價計算為 510.74 億澳門元，市場價為 492.10 億澳門元；人口為 437,500 人。
2. 假設 2020 年人口總數為 550,000 人，GDP 年均實質增長率為 4.5%，平減指數變化為 +2%。

附表 1.2 澳門 GDP 增長預測 (2000—2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	442,857	531.47	120,739	541.38	122,992
2001	448,214	573.99	128,830	573.87	128,804
2002	453,571	619.90	137,484	608.30	134,910
2003	458,929	669.50	146,739	644.80	141,325
2004	464,286	723.06	156,639	683.49	148,066
2005	469,643	780.90	167,229	724.49	155,150
2006	475,000	843.37	178,559	767.96	162,594
2007	480,357	910.84	190,681	814.04	170,416
2008	485,714	983.71	203,652	862.88	178,638
2009	491,071	1,062.41	217,531	914.66	187,279
2010	496,429	1,147.40	232,385	969.54	196,362
2011	501,786	1,239.19	248,282	1,027.71	205,910
2012	507,143	1,338.33	265,297	1,089.37	215,946
2013	512,500	1,445.39	283,510	1,154.73	226,498
2014	517,857	1,561.02	303,006	1,224.02	237,591
2015	523,214	1,685.91	323,879	1,297.46	249,255
2016	528,571	1,820.78	346,226	1,375.31	261,518
2017	533,929	1,966.44	370,154	1,457.83	274,414
2018	539,286	2,123.76	395,775	1,545.29	287,975
2019	544,643	2,293.66	423,212	1,638.01	302,236
2020	550,000	2,477.15	452,595	1,736.29	317,235
GDP累計增長 (對比2000年)		3.66倍	2.75倍	2.21倍	1.58倍

註：

1. 以1999年為計算基數，該年GDP按1996年不變價計算為510.74億澳門元，市場價為492.10億澳門元；人口為437,500人。
2. 假設2020年人口總數為550,000人，GDP年均實質增長率為6%，平減指數變化為+2%。

附表 1.3 澳門 GDP 增長預測 (2000 — 2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	442,857	538.85	122,416	549.05	124,732
2001	448,214	590.04	132,434	590.22	132,475
2002	453,571	646.09	143,292	634.49	140,719
2003	458,929	707.47	155,063	682.08	149,496
2004	464,286	774.68	167,823	733.23	158,844
2005	469,643	848.28	181,658	788.23	168,798
2006	475,000	928.86	196,659	847.34	179,400
2007	480,357	1,017.11	212,927	910.89	190,692
2008	485,714	1,113.73	230,569	979.21	202,720
2009	491,071	1,219.54	249,704	1,052.65	215,534
2010	496,429	1,335.39	270,459	1,131.60	229,185
2011	501,786	1,462.25	292,974	1,216.47	243,729
2012	507,143	1,601.17	317,400	1,307.71	259,227
2013	512,500	1,753.28	343,901	1,405.78	275,740
2014	517,857	1,919.84	372,655	1,511.22	293,338
2015	523,214	2,102.23	403,858	1,624.56	312,094
2016	528,571	2,301.94	437,720	1,746.40	332,083
2017	533,929	2,520.62	474,470	1,877.38	353,389
2018	539,286	2,760.08	514,358	2,018.18	376,101
2019	544,643	3,022.29	557,654	2,169.55	400,312
2020	550,000	3,309.40	604,655	2,332.26	426,123
GDP 累計增長 (對比2000年)		5.14倍	3.94倍	3.25倍	2.42倍

註：

1. 以 1999 年為計算基數，該年 GDP 按 1996 年不變價計算為 510.74 億澳門元，市場價為 492.10 億澳門元；人口為 437,500 人。
2. 假設 2020 年人口總數為 550,000 人，GDP 年均實質增長率為 7.5%，平減指數變化為 +2%。

附表 2.1 澳門 GDP 增長預測 (2000—2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	445,238	524.09	118,741	533.72	120,924
2001	452,976	558.15	124,280	557.74	124,189
2002	460,714	594.43	130,117	582.84	127,579
2003	468,452	633.07	136,266	609.07	131,100
2004	476,190	674.22	142,746	636.47	134,755
2005	483,929	718.04	149,574	665.12	138,549
2006	491,667	764.72	156,769	695.05	142,487
2007	499,405	814.42	164,352	726.32	146,573
2008	507,143	867.36	172,344	759.01	150,814
2009	514,881	923.74	180,767	793.16	155,214
2010	522,619	983.78	189,645	828.86	159,779
2011	530,357	1,047.73	199,003	866.15	164,515
2012	538,095	1,115.83	208,869	905.13	169,429
2013	545,833	1,188.36	219,269	945.86	174,525
2014	553,571	1,265.60	230,234	988.43	179,811
2015	561,310	1,347.87	241,796	1,032.91	185,294
2016	569,048	1,435.48	253,987	1,079.39	190,981
2017	576,786	1,528.78	266,842	1,127.96	196,880
2018	584,524	1,628.16	280,400	1,178.72	202,998
2019	592,262	1,733.99	294,699	1,231.76	209,343
2020	600,000	1,846.69	309,780	1,287.19	215,924
GDP 累計增長 (對比2000年)		2.52倍	1.60倍	1.41倍	0.79倍

註：

1. 以1999年為計算基數，該年GDP按1996年不變價計算為510.74億澳門元，市場價為492.10億澳門元；人口為437,500人。
2. 假設2020年人口總數為600,000人，GDP年均實質增長率為4.5%，平減指數變化為+2%。

附表 2.2 澳門 GDP 增長預測 (2000 — 2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	445,238	531.47	120,414	541.38	122,660
2001	452,976	573.99	127,806	573.87	127,780
2002	460,714	619.90	135,692	608.30	133,152
2003	468,452	669.50	144,107	644.80	138,790
2004	476,190	723.06	153,086	683.49	144,708
2005	483,929	780.90	162,668	724.49	150,918
2006	491,667	843.37	172,894	767.96	157,435
2007	499,405	910.84	183,810	814.04	164,275
2008	507,143	983.71	195,462	862.88	171,454
2009	514,881	1,062.41	207,903	914.66	178,989
2010	522,619	1,147.40	221,185	969.54	186,899
2011	530,357	1,239.19	235,369	1,027.71	195,201
2012	538,095	1,338.33	250,517	1,089.37	203,916
2013	545,833	1,445.39	266,695	1,154.73	213,065
2014	553,571	1,561.02	283,976	1,224.02	222,669
2015	561,310	1,685.91	302,437	1,297.46	232,753
2016	569,048	1,820.78	322,160	1,375.31	243,340
2017	576,786	1,966.44	343,233	1,457.83	254,457
2018	584,524	2,123.76	365,752	1,545.29	266,130
2019	592,262	2,293.66	389,817	1,638.01	278,388
2020	600,000	2,477.15	415,538	1,736.29	291,260
GDP 累計增長 (對比2000年)		3.66倍	2.45倍	2.21倍	1.37倍

註：

1. 以 1999 年為計算基數，該年 GDP 按 1996 年不變價計算為 510.74 億澳門元，市場價為 492.10 億澳門元；人口為 437,500 人。
2. 假設 2020 年人口總數為 600,000 人，GDP 年均實質增長率為 6%，平減指數變化為 +2%。

附表 2.3 澳門 GDP 增長預測 (2000—2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	445,238	538.85	122,086	549.05	124,396
2001	452,976	590.04	131,381	590.22	131,422
2002	460,714	646.09	141,425	634.49	138,885
2003	468,452	707.47	152,281	682.08	146,815
2004	476,190	774.68	164,016	733.23	155,240
2005	483,929	848.28	176,703	788.23	164,193
2006	491,667	928.86	190,420	847.34	173,708
2007	499,405	1,017.11	205,254	910.89	183,820
2008	507,143	1,113.73	221,297	979.21	194,568
2009	514,881	1,219.54	238,651	1,052.65	205,993
2010	522,619	1,335.39	257,425	1,131.60	218,140
2011	530,357	1,462.25	277,737	1,216.47	231,054
2012	538,095	1,601.17	299,717	1,307.71	244,785
2013	545,833	1,753.28	323,505	1,405.78	259,387
2014	553,571	1,919.84	349,251	1,511.22	274,915
2015	561,310	2,102.23	377,121	1,624.56	291,432
2016	569,048	2,301.94	407,294	1,746.40	309,000
2017	576,786	2,520.62	439,963	1,877.38	327,688
2018	584,524	2,760.08	475,339	2,018.18	347,570
2019	592,262	3,022.29	513,651	2,169.55	368,724
2020	600,000	3,309.40	555,147	2,332.26	391,233
GDP累計增長 (對比2000年)		5.14倍	3.55倍	3.25倍	2.15倍

註：

1. 以1999年為計算基數，該年GDP按1996年不變價計算為510.74億澳門元，市場價為492.10億澳門元；人口為437,500人。
2. 假設2020年人口總數為600,000人，GDP年均實質增長率為7.5%，平減指數變化為+2%。

附表 3.1 澳門 GDP 增長預測 (2000—2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	447,619	524.09	118,422	533.72	120,599
2001	457,738	558.15	123,300	557.74	123,209
2002	467,857	594.43	128,443	582.84	125,938
2003	477,976	633.07	133,865	609.07	128,789
2004	488,095	674.22	139,580	636.47	131,766
2005	498,214	718.04	145,602	665.12	134,870
2006	508,333	764.72	151,948	695.05	138,105
2007	518,452	814.42	158,636	726.32	141,475
2008	528,571	867.36	165,681	759.01	144,984
2009	538,690	923.74	173,105	793.16	148,635
2010	548,810	983.78	180,925	828.86	152,433
2011	558,929	1,047.73	189,165	866.15	156,383
2012	569,048	1,115.83	197,846	905.13	160,488
2013	579,167	1,188.36	206,993	945.86	164,754
2014	589,286	1,265.60	216,629	988.43	169,186
2015	599,405	1,347.87	226,782	1,032.91	173,789
2016	609,524	1,435.48	237,479	1,079.39	178,569
2017	619,643	1,528.78	248,751	1,127.96	183,532
2018	629,762	1,628.16	260,629	1,178.72	188,685
2019	639,881	1,733.99	273,145	1,231.76	194,032
2020	650,000	1,846.69	286,336	1,287.19	199,582
GDP累計增長 (對比2000年)		2.52倍	1.42倍	1.41倍	0.65倍

註：

1. 以 1999 年為計算基數，該年 GDP 按 1996 年不變價計算為 510.74 億澳門元，市場價為 492.10 億澳門元；人口為 437,500 人。
2. 假設 2020 年人口總數為 650,000 人，GDP 年均實質增長率為 4.5%，平減指數變化為 +2%。

附表 3.2 澳門 GDP 增長預測 (2000—2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	447,619	531.47	120,090	541.38	122,330
2001	457,738	573.99	126,798	573.87	126,772
2002	467,857	619.90	133,947	608.30	131,440
2003	477,976	669.50	141,568	644.80	136,345
2004	488,095	723.06	149,690	683.49	141,498
2005	498,214	780.90	158,348	724.49	146,910
2006	508,333	843.37	167,577	767.96	152,594
2007	518,452	910.84	177,416	814.04	158,561
2008	528,571	983.71	187,906	862.88	164,826
2009	538,690	1,062.41	199,090	914.66	171,403
2010	548,810	1,147.40	211,016	969.54	178,306
2011	558,929	1,239.19	223,734	1,027.71	185,551
2012	569,048	1,338.33	237,297	1,089.37	193,155
2013	579,167	1,445.39	251,764	1,154.73	201,136
2014	589,286	1,561.02	267,195	1,224.02	209,511
2015	599,405	1,685.91	283,658	1,297.46	218,301
2016	609,524	1,820.78	301,222	1,375.31	227,525
2017	619,643	1,966.44	319,963	1,457.83	237,205
2018	629,762	2,123.76	339,963	1,545.29	247,365
2019	639,881	2,293.66	361,307	1,638.01	258,027
2020	650,000	2,477.15	384,090	1,736.29	269,218
GDP累計增長 (對比2000年)		5.66倍	2.30倍	2.21倍	1.20倍

註：

1. 以1999年為計算基數，該年GDP按1996年不變價計算為510.74億澳門元，市場價為492.10億澳門元；人口為437,500人。
2. 假設2020年人口總數為650,000人，GDP年均實質增長率為6%，平減指數變化為+2%。

附表 3.3 澳門 GDP 增長預測 (2000 — 2020)

年 份	人 口	GDP (市場價)		GDP (不變價)	
		總額 (億澳門元)	人均 (澳門元)	總額 (億澳門元)	人均 (澳門元)
2000	447,619	538.85	121,758	549.05	124,061
2001	457,738	590.04	130,344	590.22	130,385
2002	467,857	646.09	139,606	634.49	137,099
2003	477,976	707.47	149,598	682.08	144,228
2004	488,095	774.68	160,378	733.23	151,797
2005	498,214	848.28	172,010	788.23	159,833
2006	508,333	928.86	184,564	847.34	168,366
2007	518,452	1,017.11	198,115	910.89	177,426
2008	528,571	1,113.73	212,742	979.21	187,046
2009	538,690	1,219.54	228,535	1,052.65	197,262
2010	548,810	1,335.39	245,589	1,131.60	208,110
2011	558,929	1,462.25	264,007	1,216.47	219,631
2012	569,048	1,601.17	283,901	1,307.71	231,868
2013	579,167	1,753.28	305,392	1,405.78	244,864
2014	589,286	1,919.84	328,613	1,511.22	258,670
2015	599,405	2,102.23	353,704	1,624.56	273,336
2016	609,524	2,301.94	380,823	1,746.40	288,917
2017	619,643	2,520.62	410,135	1,877.38	305,472
2018	629,762	2,760.08	441,823	2,018.18	323,063
2019	639,881	3,022.29	476,085	2,169.55	341,757
2020	650,000	3,309.40	513,133	2,332.26	361,625
GDP 累計增長 (對比2000年)		5.14倍	3.21倍	3.25倍	1.91倍

註：

1. 以 1999 年為計算基數，該年 GDP 按 1996 年不變價計算為 510.74 億澳門元，市場價為 492.10 億澳門元；人口為 437,500 人。
2. 假設 2020 年人口總數為 650,000 人，GDP 年均實質增長率為 7.5%，平減指數變化為 +2%。

附表 4.1 人口與人均 GDP 發展趨勢相關值參照表

人口數	年均增長	增長倍數 (市值)	增長倍數 (恆值)	備 注
55萬	4.5%	1.83	0.92	期望值最佳
	6.0%	2.75	1.58	
	7.5%	3.94	2.42	
60萬	4.5%	1.60	0.79	
	6.0%	2.45	1.37	
	7.5%	3.55	2.15	
65萬	4.5%	1.42	0.65	期望值最差
	6.0%	2.30	1.20	
	7.5%	3.21	1.91	

注：設人口質量為常數。

附表 4.2 人口與人均 GDP 發展趨勢相關值參照表

年均增長	人口數	增長倍數 (市值)	增長倍數 (恆值)	備 注
4.50%	55萬	1.83	0.92	期望值最差
	60萬	1.60	0.79	
	65萬	1.42	0.65	
6.00%	55萬	2.75	1.58	
	60萬	2.45	1.37	
	65萬	2.30	1.20	
7.50%	55萬	3.94	2.42	期望值最佳
	60萬	3.55	2.15	
	65萬	3.21	1.91	

注：設人口質量為常數。

附表 5 世界主要國家經濟預測

(1998 - 2010)

國別	1998		2010		總增長幅度 (%)	佔全球份額 調整(%)
	GDP (億美元)	佔全球比重 (%)	GDP (億美元)	佔全球比重 (%)		
美國	82,304	28.60	113,310	24.60	37.67	-4.00
歐盟	83,369	29.00	114,776	24.90	37.67	-4.10
日本	37,830	13.20	47,414	8.20	25.33	-5.00
中國	9,590	3.33	21,600	4.70	219.08	+1.37
俄羅斯	2,766	0.96	3,944	0.86	87.56	-0.10
其他地區	71,770	24.91	168,491	36.74	134.76	+11.83

資料來源：世界銀行，根據新華社發稿(見福建日報 2000 年 9 月 5 日)重新編制。

附：參加本研究報告諮詢的機構社團 (按繁體筆劃排序)

澳門大學工商管理學院	澳門娛樂服務業商會
澳門工商管理研究生協會	澳門旅行社協會
澳門工程師學會	澳門旅遊商會
澳門工會聯合總會	澳門旅遊零售服務業總商會
澳門中小企業協進會	澳門留日同學會
澳門中國企業協會	澳門財資市場公會
澳門中華教育會	澳門酒店協會
澳門中華總商會	澳門婦女聯合會
澳門毛織毛紡廠商會	澳門街坊會聯合總會
澳門付貨人協會	澳門會計師、核數師公會
澳門出入口商會	澳門電子商務協會
澳門生產力暨科技轉移中心	澳門電腦學會
澳門地產業商會	澳門福建總商會
澳門房地產聯合商會	澳門管理專業協會
澳門社會科學學會	澳門銀行公會
澳門青年商會總會	澳門廠商聯合會
澳門建造商會	澳門繁榮促進會
澳門建築置業商會	澳門歸僑總會
澳門科學技術協進會	

參加本研究報告諮詢的各界人士 (按繁體姓氏筆劃排序)

尤淑瑞	林香生	郭 林	黃善文	劉藝良
毛良官	姚汝祥	陳守信	楊家基	黎仲勳
王承舜	洪美英	陳健文	楊振業	蕭志偉
甘樂年	區永強	陳健英	葉建華	戴 鷹
何嘉達	區秉光	陳敬紅	葉榮發	鍾小健
余健楚	尉東君	陳滌江	劉本立	羅盛宗
吳在權	張作文	陳燦鷗	劉品良	關恩賜
李洪光	張志民	彭為錦	劉建國	
李勝利	梁文耀	曾澤瑤	劉健豪	
李雁玲、	梁偉強	馮家超	劉雅煌	
周介之	梁維特	黃孝傑	劉經建	

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澳門2020

—未來20年遠景目標與發展策略

PREFACE

Edmund Ho, Chief Executive of Macau Special Administrative Region

It has been one year since Macau became officially reunited with the Motherland. During the year, the Government of Macau Special Administrative Region commenced its administration under Mr. Deng Xiao Ping's principle of "One Country, Two Systems". It was also the year that saw the consolidation and recovery of Macau's economy after suffering from a tremendous recession that the territory had never encountered before. In addition, this year has witnessed the solidarity and assiduity of Macau people. With the autonomy to exercise rights and make decisions, our residents have striven to master their destiny and geared up for development.

To exemplify the success of the innovative idea of "One Country, Two Systems" and accelerate the economic recovery, the Government of Macau SAR has introduced a series of measures, which have received enthusiastic participation of our residents. Although we have not yet been able to achieve any substantial accomplishments due to various constraints in the previous year, we are proud to say that the foundation laid by our concerted effort will definitely have a long lasting positive effect on the future rapid growth of Macau.

To expedite and coordinate our developments for the highest possible standard and growth, we need to study seriously the common pattern of the global economy and the specific pattern of Macau's economy, which has its unique social and historical backgrounds. With a good understanding of this and the use of our intelligent and scientific mind, we can identify a strategic direction that will best suit our unique strength and better position ourselves. This will also help us determine and master our future in an environment that is becoming more complex. Encouragingly, all sectors of our community highly regard the study of development pattern. We are also happy to see the emergence of young entrepreneurs who

have both financial capability and business vision, and the formation of academic associations with strong research capability. Such development can be evidenced by the publication of "Macau 2020 -- The Long-term Objectives and Development Strategies in 20 Years", jointly compiled by the Macau Development Strategy Research Centre and the Macau Association of Economic Sciences. This report reflects a serious research undertaken by two non-government organizations, after the hard work of numerous discussions and consultations in more than six months. In this report, you will find a lot of insightful ideas, thoughts and viewpoints. This research report will not only provide a useful reference for the Macau SAR Government to formulate new policies, but will also re-establish our confidence in Macau's bright future. Hence I would like to express my sincere gratitude towards the innovation and genuine effort of the two organizations. It is also my hearty congratulations to the successful publication of this research report at such a critical time.

Macau is our hometown, where we have developed and grown for many generations. After the reunion with the Motherland, we will continue to expedite, coordinate and enhance our systems to ensure the success of our development. We love today's Macau and have tremendous confidence in our tomorrow. Facing the rare opportunity created by history, with the support of the Motherland, with our hard work and intelligence, we shall be able to develop a new, stable and prosperous Macau that truly belongs to the Motherland and the people of Macau.

On the Eve of the First Anniversary of
Macau's Reunion with the Motherland

December 2000

1. FOREWORD

"A better tomorrow for Macau" is a familiar slogan to many local residents and the people who care about Macau. This is a very positive and correct message, yet its subject is interchangeable. It can apply to Macau after its reunion with the Motherland, and it can also apply to the entire nation including Taiwan as well as the whole world. Not only Macau, but all people and nations in the world shall have a better tomorrow. However, how can we realize this "better tomorrow"? Who should and how to strive for this? Clearly, the answer is the people of Macau. We need to strive for this goal with our perseverance and determination, not only with our hard work but also with our intelligence and wisdom.

There is a Chinese saying that "Those who do not plan for the future will find trouble at their doorstep." As Macau is still struggling with its current economic recession, each community member should seriously and systematically review the current situation and envision the future development. This will be critical to the administration of the Macau SAR Government and for the benefits of all the residents living here.

How would the Special Administrative Region of Macau become in 20 years, after the first four terms of Chief Executives who may have different initiatives to develop the territory under the principle of "One Country, Two Systems"? Do Macau residents have a clear objective to pursue? What is the confidence level of Macau people put in the SAR Government for its implementation of policies under the spirit of "One Country, Two Systems"? How do our fellow citizens in the Mainland view the future development of Macau? And what is the international view on the new Macau SAR Government?

All these actually point to a realistic and challenging issue -- we can't arbitrarily draw a future plan, but must have a clear objective and mission. We should think in a scientific and rational manner, explore the future based on facts and strive persistently for decision making and control. We have every reason to create a bright future for Macau, with ourselves as the masters of our own under the spirit of "Macau to be governed by Macau people". There is no reason for us to ignorantly follow the trend set by other people. We have constraints for development, but there is plenty of room for expansion, with no concern of "absolutely fully developed". There is a Chinese saying that "A journey of thousand miles starts with the point where your feet presently stand". After setting our objectives, we should seriously explore, develop and strive towards them. We should highly commit ourselves and perform our tasks carefully and efficiently.

Based on the above understanding and after all the hard work of research, review, consultation and exchange of ideas, we have compiled this report. We hope it will invite further discussion by the talents of the community. With the combination of intelligent ideas, we can mutually formulate a strategy for Macau's future development and create a prosperous society that we, our sons and the future generations can happily enjoy and feel proud of.

2. ASSUMPTIONS

2.1 No uncontrollable natural disasters occur in Macau or the surrounding areas and there is no global economic recession in the next 20 years.

- 2.2 *Taiwan can reunite with the Mainland and end the opponent status in the last five decades, which shall be a win-win situation for both. During the final peaceful reunification process, any external interference shall be suppressed and any irrational thinking of the leaders of both Taiwan and the Mainland shall be relinquished.*
- 2.3 *The principle of "One Country, Two Systems" and the Basic Law of the Macau Special Administrative Region can be implemented effectively.*
- 2.4 *The financial and economic policies can be implemented smoothly with coherence by the Chief Executive and the Macau SAR Government from the first to the fourth term.*
- 2.5 *A mutual understanding on the direction and strategy for Macau's development can be reached among most Macau people, including the permanent and non-permanent, Chinese and non-Chinese, old and new residents; rich bosses and ordinary workers; the educated and uneducated; and members of existing interest groups and non-interest groups. This mutual understanding can drive the community forward.*
- 2.6 *The community shall be truly governed by laws. There shall be no blind spots, dark areas or any obviously non-regulatory aspects in the policies of Macau Government that are not acceptable in a modern civilized society. All non-government organizations, business operators and community members should willingly adapt to the rules of an open*

and fair competition and strive on their own to become leaders.

2.7 A fair, open, clean and democratic principle to ensure the full utilization of all productive factors in a free market system, particularly those in the new economy such as information and intelligence, and that it can become a basic principle in all the transactions conducted in Macau.

2.8 If the above assumptions cannot be entirely fulfilled, Macau's development will become uncertain. We hope that we are only over-concerned.

3. THE OBJECTIVES

3.1 The Main Objective

To establish Macau as a medium-sized international city under the principle of "One Country, Two Systems" that is fully open in China as well as the Asia Pacific Region through the hard effort of 20 years.

3.2 The Following Major Milestones should be Achieved by 2020

3.2.1 Major economic and development indices approximate or equal to the average of developed cities or countries in the world. The overall GDP and the GDP per capita should increase by more than 1.5 to 2 times and 3 to 3.5 times at constant prices and current prices of 2000 respectively. This represents an annual real growth rate of 6%, based on an assumption that the total population of

Macau will only rise moderately (the maximum can be limited to 600,000 in 20 years). This also indicates a social structure with the middle income class as the core group in Macau. The income difference among the community members can be reduced, with the Gini coefficient maintained at 0.3 to 0.4.

- 3.2.2 A positive leading role in the cooperation with Guangdong Province and Hong Kong.
- 3.2.3 A leading city with an extensive international network that is highly regarded by the Asia Pacific Region and the world.
- 3.2.4 A unique and competitive system for tourism, integrated services, communication, off-shore finance, higher education and culture. Also, high competence and advanced development in new and value-added products for the manufacturing sector.
- 3.2.5 An appropriate fiscal reserve, a better social welfare system, a higher capability to handle natural disasters and crisis management, and a higher competence for self development.
- 3.2.6 A democratic political system based on a stable foundation. To become more involved in public administration, the middle-income professionals can properly perform their expected functions in terms of quality and quantity.

3.3 The Practical Definition of a Prestigious International City

- 3.3.1 A driving force in the national and regional development, with a high level of standard in the rationality of industrial structure, production efficiency, creativity and management that can match the international or regional standard.
- 3.3.2 A rapidly growing territory that has the advanced infrastructure and fast communication to perform the functions of a global or regional centre.

- 3.3.3 A cultural exchange centre and international trading centre, with an extensive international network, a highly recognized image and a high-volume traffic of people, goods and communication.
- 3.3.4 A well developed economic mechanism that is able to have sustainable development and maintain a high growth rate while keeping a low inflation and unemployment rate.
- 3.3.5 A balanced development for the community, with fair competition, freedom of press, low crime rate, fair judicial system, and a comfortable and harmonious environment for the living and development of different groups of people.
- 3.3.6 Distinctive and unique strength in certain areas of the economy, which can be developed into a highly competitive edge in the international market.

3.4 Definitions of a Medium Sized City

- 3.4.1 A population of 500,000 to 1,000,000. With the land area expanded by less than 100%, Macau's maximum population can grow to 600,000 in 20 years.
- 3.4.2 An appropriate size of area. Based on a realistic assumption, Macau can expand its area to about 35 to 40 square kilometres.
- 3.4.3 The economic impact and potential surpass those of the nearby cities with similar size of land and population.
- 3.4.4 A complementary role and transit centre for major international cities in the region.
- 3.4.5 "Medium size" refers to the possession of basic resources, and does not represent a moderate development. As a prestigious world-class international city, its social and economic development shall reach the high standard of developed countries.

3.5 Concepts and Results

- 3.5.1 Based on the experience in China or other countries, there is a solid proof that we should from time to time adjust and revise our concepts and directions to achieve a better result.
- 3.5.2 It is an optimization process of continuous learning as well as a scientific process of decision making to revise the development concepts, which should be a focal point of the Macau SAR Government as well as the entire community.
- 3.5.3 "Positive" and "negative", "open-minded" and "narrow-minded", "innovative" and "old fashioned" are pairs of opposite words that are not only different in meaning but also contrasting in principle. People often talk about "positive, open-minded and innovative", but may not actually or whole-heartedly be so. On the other hand, no one will admit that he is negative, narrow-minded, or old fashioned, but in fact he is. Hence there will be a mix of people who are superficially positive, open-minded and innovative with people who are actually negative, narrow-minded and old fashioned. They will co-exist in an organization, corporation or institution.
- 3.5.4 A successful development is very often a result of a combination of various related factors. However, under the same conditions or constraints, some people may succeed while some may fail. This is true not only at the peak but also at the bottom of an economic cycle. Hence we should focus on improving the internal and subjective factors.
- 3.5.5 For Macau's future development, we may consider the following four types of strategies: (1) stable, (2) transforming, (3) expanding, and (4) innovative. From a conservative point of view, the order of preference should be (1)>(2)>(3)>(4). However, when considering effective returns, the order should be (1)

<(2) <(3) <(4). Actually, we cannot say that a stable strategy is totally wrong, as an innovative strategy may not be entirely correct. It depends on the timing of implementation. A stable strategy may be necessary at a certain period, while innovative strategy may be critical for certain issues. Hence the crux lies in the flexible implementation of various strategies. In summary, we believe that Macau should primarily adopt an expanding and innovative strategy, with the complement of a stable and transforming strategy. In the beginning, Macau should execute a stable and transforming strategy, but in the long run, it should better adopt an expanding and innovative strategy.

3.6 The Possible Economic Development during the Four Terms of Macau SAR Government

3.6.1 The first term of the Macau SAR Government (2000-2005)

The former Macau Government, under the ruling of Portugal, has governed this territory for a long period of time and left many unresolved issues. Unfortunately, when the Macau SAR Government commenced its administration, our economy suffered a downward trend. Hence the first term of SAR Government has to make a tremendous effort in the first and second years to resolve the outstanding issues and build up a new foundation. This will help our economy turn around and grow rapidly in the latter three years (an annual real growth rate of approximately 5% to 8%). In summary, the objective for the first term of SAR Government is to initially build up a fiscal reserve and establish an appropriate strategy and foundation for Macau's long-term development.

3.6.2 The second term of the Macau SAR Government (2005-2010)

It is expected that the global economy will continue to grow steadily in the

first decade of the 21st century. As Macau has established a more stable foundation for its development, its economy will grow at a much faster pace in these five years. Also, there should be a substantial breakthrough in the reform of public administration. However, as the export quota for textiles will be cancelled in this period, the manufacturing sector should properly prepare and adjust itself for that. If this is not handled properly, the Macau SAR Government will have to deal with another economic challenge.

3.6.3 The third term of the Macau SAR Government (2010-2015)

It is possible that the global economy may experience a periodic adjustment in these five years. However, by that time, the Pearl River Delta Region should become modernized and Hong Kong should be a prestigious international metropolitan city in the region. This will be beneficial to Macau's development. Also, by that time, Macau should have established a new foundation for its economy, with a smooth government administration. Hence, Macau's economy should be able to maintain a fast and quality development in these five years. The gap with the developed countries will be further reduced. However, the Macau SAR Government and the community should always keep in mind the importance of crisis management, alertness, autonomy, and innovation.

3.6.4 The fourth term of the Macau SAR Government (2015-2020)

After tremendous effort to revise the original objectives of development, this term of the Macau SAR Government should be in a better position to further expand the economy. Given a better foundation, the Government should be able to enhance the social structure and steer the economic development in a correct track for a higher return. Macau's social and economic development should have a tremendous improvement, which will enable the territory to become a prestigious city in the region. However, we should not rule out the possibility

that the above objectives cannot be achieved and Macau will further lag behind Hong Kong and other nearby cities.

4. THE EXTERNAL ENVIRONMENT

4.1 *The Global Economy in 2020*

In the first two decades of the 21st century, as driven by globalization, unification, internet networking and information technology, the global economy is likely to have a stable and rapid growth that has never seen in history. It is expected that the Asia Pacific Region, European Union and North America will achieve outstanding performance. The global economic structure will undergo a fundamental change. With the new economy that based on information and knowledge as the core structure, the global economy will have a major change in the format as well as the driving force. The weightings of different regions in the global economy will also have a significant adjustment. New technologies and inventions, especially in the areas of high technology and its applications, will have a profound and significant impact on the living of human beings and the development of the whole world.

As analyzed by the American academics, there are four major features of the "new economy": (1) The revolution of information technology originated in the US since 1980's has led the transformation of industrial structure and the growth of hi-tech oriented industries. The production efficiency has been significantly improved, and the improvement has provided a foundation for the continuous growth of nine years. (2) Knowledge plays a significant role in the new economy. Intellectual properties have become the driving force to sustain the economic growth. Presently in the US, about 60% of the labour force are knowledgeable workers and 80% new jobs are created

by knowledge intensive departments. (3) The new economy is in a form of global economy, as information technology, particularly the internet, has significantly eliminated the geographical boundaries of the world. There is an increased mobility in the world's capital, production capacity, management, products, labour force, information and technologies. There are more cooperation in business trading and technical connection among corporations and nations. At the same time, competition has also become more intensified. (4) The new economy has smoothed out the economic cycle in four aspects. First, there is a longer period of expansion. Secondly, the recession period is shortened and the decrease in production is reduced as well. Thirdly, both the inflation and unemployment rate maintain at a low level during the expansion period. Fourthly, corporate investment significantly increases, as the economy expands.¹ In summary, the old economy is relied on the availability of resources and the expansion of inputs, tangible products and assets. This has shifted to a new economy that relies on knowledge and information, the expansion of production and the increased transfer of intangible assets.

There is a prevailing trend of e-Commerce (which may also be termed as e-Business or e-Trade) that operates on a new business model based on the utilization of internet, the interaction of two parties in the transactions, electronic payment gateway and customer data. In May 1998, 132 member countries of the World Trade Organization signed the "Declaration of e-Commerce", which has signified the beginning of the new e-Commerce era. It is expected that by 2005, e-Commerce will expand its current share of total trading in developed countries from 20% to 70%. To many people in various countries and areas, the year 2020 will see a broad horizon of diversity, speed and selections.

1. Li Jingwen, *Overview of China's Economy in 2000*, Beijing: Tuanjie Press, November 1999, p. 4.

Driven by knowledge, globalization, internet networking and information technology, and in an environment of intense competition, high returns, advanced technology and new concepts, the global economy in 2020 is expected to have a real growth of 1.5 to 2 times over that in 2000. As estimated by the World Bank, the share of China, Russia and other countries (excluding Japan, the European Union and the US) in the world economy will increase from 29.20% in 1998 to 42.30% in 2010 (Exhibit 5). It is expected that this figure will further rise by 2020.

4.2 Asia Pacific and the Far East in Twenty Years

The 18 member countries of the Asia-Pacific Economic Cooperation (APEC) have a total population of 2.2 billion, which is approximately half of that of the whole world. In mid 1990's, APEC has an aggregate GDP of US\$12,000 billion and the inter regional trade made up 40% of the whole world. Led by the "four little dragons" (South Korea, Taiwan, Hong Kong and Singapore), the Far East's economy has undergone a significant change. With the implementation of open-door policy, China has also achieved an amazingly outstanding performance for its socialist market economy. As indicated by the "Declaration of Wealth" of APEC in 1994, the policies of free trade and free investment will be fully implemented among the countries in the Asia Pacific Region. Twenty years from now, the world's largest free trade zone will be established in the region. The combination of both economies of China and the Asia Pacific Region will undoubtedly take a major position in the global economy. As free trade is introduced, the region will become a leading economy in the world, both in terms of growth rate and development quality.

The development in the Asia Pacific Region, primarily represented by the countries in the west Pacific Ocean, has been amazing. In a report released by the World Bank

about 10 years ago, it says, "Since the 1960's, the growth rate experienced by Asian countries has been two times over all other countries, three times over Latin America, and five times over Africa's Sahara. It has also surpassed the industrial countries, North Africa and the petroleum-rich Middle East. During the period between 1960 and 1985, the real income per capita of Japan and the 'four little dragons' in Asia has increased more than four times, while the new industrial countries in the South East Asia have also gone up more than two times."² The regional financial turmoil that occurred three years ago has made some Asian countries redefine their development strategies with a focus on quality and economic return. In twenty years, this region, including China, will no doubt become one of the largest and most active economic centre in the world.

4.3 *China's Economy in 2020*

"China has only spent the time of one generation and achieved a result that took many countries to accomplish for many centuries. As a country that has a population more than the aggregate of that in Africa and Latin America, China has achieved the most amazing development in our age."³

China is now in the process of transforming from a traditional agricultural society to a modernized industrial society, and from a planned economy to a socialist market economy. "The transformation will create some strong whirlpool and turbulence, which may become an unpredictable factor that may affect the stability of the society."⁴

2. *World Bank Report, The East Asian Miracle: Economic Growth and Public Policy, Oxford University Press and the World Bank, 1993, p. 2.*

3. *The World Bank, China in 2020 -- The Challenge of Development in the New Century; quoted from Yang Shujin, China: Reform, Development and Stability, China Development Press, January 2000, Preface, p.1-2.*

4. *The World Bank, China in 2020 -- The Challenge of Development in the New Century; quoted from Yang Shujin, China: Reform, Development and Stability, China Development Press, January 2000, Preface, p.1-2.*

However, we have good reasons to believe that China will implement its future four five-year plans in a realistic and aggressive manner. When the second 10 years since the open-door policy completes, China's economy is expected to grow to a significant high level. The cities and provinces along the eastern coast will be the first areas that enjoy the status of moderately developed economies. Based on the studies conducted by the Development Research Centre of the State Council, China's economy will have an average annual growth rate of about 7.3% from 2000 to 2020. The GDP in 2020, at constant prices, will be more than two times over that in 2000. By then, China's GDP per capita will reach US\$5,000, which is approximately the world's average in 1997. In terms of total dollar amount, China's GDP will be ranked the third in the world, following the US and the European Union but ahead of Japan. By purchasing power parity (PPP), China's GDP will be approximate to that of the US at that time.⁵ By 2020, China's export over the world's total will jump from 2.8% to 8.6%, representing a growth of more than two times. Foreign trade will make up 30% of China's GDP, which is very similar to that of the developed countries. In the tenth five-year plan, Chairman Jiang Zemin said, "Our objective for the next century is that the GDP in the first ten years can increase 100% over that in 2000. Our people can enjoy a comfortable life in a better socialist market economy. Then after the hard effort of another ten years, when we celebrate the 100th anniversary of the founding of our party, China's economy can further develop and our systems can be even better...."

Based on a relatively conservative estimate made by the Chinese Academy of Sciences, China's GDP per capita will reach US\$2,125 (at constant prices of 1990) by 2020, with an annual growth rate between 4.9% and 7.2%. To maintain a sustainable growth, China should implement the strategies of "birth control, resources saving,

5. Li Shantung et al., "The Prospect of China's Economic Growth," *Macao Daily News*, 26 April 2000, p. A4.

environmental protection, stability, and scientific decision making".⁶ In another report, "The Sustainable Economic Growth and Policy Reform in China", it says, "China's economy will maintain a real annual growth rate of over 6%. By 2020, China's GDP per capita will equal to that of middle-income countries, which will signify the end of poverty for China."⁷ In a report released by the Economic Research Centre of the State Planning Commission of China, it estimates that "China's GDP should be able to achieve a moderate growth rate of over 7% in the next 15 years, in view of the supply and demand condition and the contribution of technology advancement."⁸

E-Commerce is now expanding at a fast pace in China. The latest survey in the beginning of 2000 has indicated that there are currently about 40,000 commercial web sites operating throughout the nation. The sales and transaction amount on the internet is expected to reach US\$40 million this year and will grow to US\$3.8 billion in three years, which will make China the second largest web market in the world. By September 2000, China's telephone users will reach an aggregate of 200 million, of which 135 million are fixed telephone line subscribers and 65 million are mobile phone users. China's telephone network in terms of size and scale is ranked number two in the world. It is expected that mobile phone users will exceed 100 million by 2003, of which 30% will be internet users. By 2010, the total number of mobile phone users will grow to 200 million, of which 40% to 50% will be internet users. In the first quarter of 2000, China's internet population has reached 10 million, which is expected to become the second largest in the world in five years, following close behind the US. By 2020, the number of web sites and internet users in China will be in a leading position of the world.

6. *The Chinese Academy of Sciences, The Report on Sustainable Development Strategy for China in 2000*, p. 8.

7. *Macao Daily News*, 1 June 2000, p. A4.

8. *Wenhui Pao*, Hong Kong, 10 June 2000, p. A1.

In the 15th Plenary Session of the Fifth Central Committee of the Chinese Communist Party, it stated, "The three missions to accomplish in the new century are: continuation of the modernization; reunification of China; and maintenance of the world's peace and mutual development." Recently, it further indicated that "the focus is on development, the key is in the economy, the momentum lies in the reform and technology advancement, and the principal consideration is on the improvement of living quality for our people."⁹ China has continuously intensified its reform and enhanced its unique socialist market economy. In 2000, China will officially join the World Trade Organization and commence extensive development for its western areas. By 2020, China is likely to become an emerging nation of super power and establish a solid foundation to become a modern socialist country in mid-21st century. Furthermore, under the principle of "One Country, Two Systems", if Taiwan and Mainland China can work out a new concept and model to realize a peaceful reunion, then the Greater China Region, consisting of the Mainland, Taiwan, Hong Kong and Macau, will be one of the most influential economic entities in the world.

4.4 *The Emergence of the Greater Delta Region of Pearl River*

4.4.1 The Greater Pearl River Delta Region

The Greater Pearl River Delta Region covers an area of 42,700 square kilometres that includes Hong Kong, Macau and Guangzhou, of which the Delta Region encompasses 41,600 square kilometres, Hong Kong 1,084 square kilometres, and Macau 23.6 square kilometres. The total population of this region is 27.6 million, of which the Delta Region has 20.56 million, Hong Kong 6.6 million and Macau 0.43 million. This economic entity may well be called the

9. *Macao Daily News*, 12 October 2000, p. A4.

Great Triangle of Guangdong, Hong Kong and Macau. In the past, the three areas commonly shared resources, worked closely with intensive communication, and cooperated on a fair and mutually beneficial basis. Since China's reform in the previous twenty years, the three areas have developed a much closer economic cooperation. Following the reunion of Hong Kong and Macau with the Motherland, the three areas are now in a position to expand their cooperation on a mutually beneficial and complementary basis, which is expected to generate a better economic return. In view of the above, the Great Pearl River Delta Region has a promising future and will become a major growing area in the Asia Pacific Region and the Far East.

4.4.2 The Pearl River Delta Region

This covers the area in the lower stream of the Pearl River, which consists of 40 counties (including cities and regions at the county level) and nine cities in the Guangdong Province, such as Guangzhou, Shenzhen, Zhuhai, Dongguan, Zhongshan, Foshan, Jiangmen, Huizhou (including Huicheng, Huiyang, Huidong and Boluo), and Zhaoqing (including Duanzhou, Dinghu, Xihui and Guoyao). With the highest foreign investment in China, this delta region has the largest labour force of workers who come from various inland cities and provinces. As the industrial structure is rapidly improving, the region has a sophisticated transport and communication system. Its service industry and technical industry have already attained a relatively high level of standard. The difference between city and rural area has been significantly reduced and the region is moving upward to the status of a major city. This territory and the Delta Region of Yangtze River have become two driving forces for China's economy. Based on the current planning, some of the cities with a better foundation in the Pearl River Delta Region will be able to realize the goal of modernization between 2005 and 2010.

By 2020, led by the development in the region, the Guangdong Province is likely to reach the level of a moderately developed country. It will implement the strategies of "outward bound", "advanced technology" and "sustainable development" to transform the economic system and development model for its major city, Guangzhou. As a result, Guangzhou will become a centre of manufacturing, transportation, business and finance, new technology, communication, education, culture and tourism. As a modern city, Guangzhou will be a leading model of integrated services and innovative ideas. It will become one of the first moderately developed cities in China in the first decade of the 21st century.

- 4.4.3 Zhuhai, physically connected by land and closely linked by economic cooperation with Macau, has built up a realistic foundation. It will further intensify reform, enhance the judicial system, and insist on sustainable development and new technology. It has established five development zones, including the New Industrial Zone, Zhuhai Free Trade Zone, Coastal Industrial Zone, Hengqin Economic Zone and Outward Ocean Zone. By 2007, it is expected that Zhuhai can realize the primary objectives of socialist modernization. Its future direction is to become a leading high-tech, information technology oriented industrial base, a prestigious research and development centre, a high value-added manufacturing base that can generate foreign currency, and a modernized regional city.¹⁰

10. Zhuhai SAR Daily, 2 November 2000, p. A1.

4.5 *The Positioning of Hong Kong Special Administrative Region*

4.5.1 Hong Kong has a Bright Future

"The long-term objective of Hong Kong is not only to maintain its status as one of the major cities in China but also a leading metropolitan city in Asia." The dual goals are complementary to each other. "If Hong Kong becomes a truly international metropolitan city, it will contribute significantly to China's development. On the other hand, as a major city of China, Hong Kong enjoy special privileges that will consolidate its status as an international metropolitan city."¹¹ The success of Hong Kong's dual functions is determined by the following seven major factors.

4.5.1.1 A Truly Global Financial and Business Centre

The regulatory mechanism, technical infrastructure and facilities for the finance and commercial sectors should be maintained at a world-class standard. New financial products and services should be introduced from time to time. Related policies should be updated to keep in pace with the development of Hong Kong as a leading financial centre in the region. Innovation and efficiency should be maintained at all times.

4.5.1.2 More Multi-national Corporations to Set up Regional Headquarters

Hong Kong should adopt the best international practice and implement clearly defined strategies to attract foreign investors. It should enhance promotions to the Mainland's major corporations, particularly those hi-tech companies, and invite them to set up international headquarters in Hong Kong.

11. Hong Kong Strategy Development Committee, *Jointly Create a Bright Future with Mutual Vision*, p.V-VI.

At the same time, however, Hong Kong should beware of the trend that many emerging enterprises, particularly those in the information service sector, are making use of computer technologies to operate their business and may not require the physical setup of regional headquarters.

4.5.1.3 Tourism Significantly Contribute to the Overall Economy

New scenic spots of Disney Theme Park and Wet Land Natural Park will be successively established. Business tours and Mainland visitors have been on the rise. As the first travelling stop to China and other Asian locations, Hong Kong will have a rapid growth in tourism, which will continue to significantly contribute to the overall economy of the territory.

4.5.1.4 An Advanced Information Service Centre

Hong Kong should enhance the development of electronic publishing, electronic education, multi media, news reporting, business telecommunication and computer software. It should continuously encourage the commercial sector to undertake major investment projects. The territory should further enable the development of the information service sector and open up competition for the telecommunication industry. It should continuously provide a high quality telecommunication service at a competitive price, encourage major media and communication operators to expand their services in Hong Kong and develop the territory into a telecommunication centre that can provide diversified and value-added services.

4.5.1.5 An Innovative and Advanced Technology Centre for Southern China

To develop a knowledge-based economy, it is important for Hong Kong not only to provide the necessary infrastructure and facilities but also cultivate an innovative technology culture. Hong Kong should establish an encouraging business environment to assist companies that develop and apply innovative

ideas and technologies. Hong Kong should strengthen the cooperation with the Mainland. With the focus on the development of information technology, Hong Kong should also study the expansion in other sectors, which should include the application of new technologies to traditional industries.

4.5.1.6 Maintain the Position as an International Business and Transport Centre and Become a Regional Logistics Centre

Hong Kong has long been a major international trade centre. It should continue to expand business trade, explore opportunities in the Mainland and other emerging markets, and actively develop related services such as logistics, law and accounting. Due to the rise of global trade and the development of the Pearl River Delta Region, Hong Kong's position as an international transport centre will be further enhanced. To establish as an international aviation centre, Hong Kong should continuously seek partners to develop new traffic routes. With a busy container terminal, Hong Kong's container industry should concentrate on provision of value-added services. As an international transport centre, Hong Kong should improve and promote the services of Hong Kong Shipping Registry, develop shipping insurance market, and enhance cooperation with the shipping industry of the Mainland. In view of the future trend of electronic trading, Hong Kong should expedite the establishment of necessary infrastructure, develop related technologies and set up proper rules and regulations.

4.5.1.7 Creative and Cultural Activities to Enhance Living Quality

Hong Kong's music, movie, television, and other design and entertainment productions have attained a very high standard. However, it should further promote local culture, encourage creative arts, and cultivate the youth's creativity. It should allocate resources to encourage more high quality creative and cultural

activities. It should also seriously enforce the laws to protect the intellectual properties.

4.5.2 A Close Relationship between the Special Administrative Regions of Hong Kong and Macau

The idea of "One Country, Two Systems" is invented by China, with no precedent in the world. Although Hong Kong and Macau are different in size and scale, development status and legal system, they are both examples of the "One Country, Two Systems" policy. The original social and economic systems of both cities shall remain unchanged for 50 years. Both free ports, the two cities are close to each other and have a broad base of cooperation. Hence, with reasonable exchange of productivity, Hong Kong and Macau can complement each other and may both gain tremendous mutual benefits.

5. WHERE DOES MACAU GO FROM HERE

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5.1 Macau is a territory that has a combination of weak and strong economic features. It has achieved a rather high economic growth, yet it has a number of variables in its development.

As a mini economy that has its unique industrial structure, Macau faces a challenge of economic liberalization, internationalized economic development, regional economic cooperation, intensive knowledge industry, servicing industry, tourism and casino business, upgrading manufacturing industry, diversified financial products, economic information, and competition for talented people. Hence, we need to properly position ourselves and scientifically design the future direction for Macau.

5.2 *Major Contributors of Macau's Future Economic Development*

5.2.1 Tourist and Casino Centre

By the authority prescribed by the Basic Law and the premise to safeguard the overall interest of the community, Macau shall formulate its policy for tourism and lottery business. By steadily, rationally and systematically open up the casino sector, we can introduce a competition mechanism and bring in new momentum of modernization and information technology for this old casino business. As the only city in China that is permitted to operate casinos, Macau will gradually become the major gambling centre that utilizes modern technology in the Asia Pacific Region. Being an integrated tourist centre, Macau will provide quality services at a reasonable price for different tourists who come for scenery spots, conference or leisure. As a result, the tourist business will attain a prestigious image and expand to a larger scale that make it truly becomes the core industry of Macau's economy.

5.2.2 Diversified Intermediary Service Centre

The Macau SAR Government should strive in the next 20 years to establish the territory as an information, capital and logistics centre. Its diversified and integrated intermediary services will be a competitive edge. The existing industries of finance, insurance, law, accounting, consultation and education should be expanded to an international standard. Other industries such as e-Commerce, publishing, advertising, image design and packaging can be developed to provide quality services for surrounding areas. The real estate industry is expected to recover from recession and become thriving again.

5.2.3 Product Development Shall Play a Part

After a period of transformation and adjustment, Macau's manufacturing

industries that have unique local features can be re-established. There may be three directions of development: First, to develop new appropriate products by Macau's own effort; second, to cooperate with the Mainland cities for development and conversion; and third, to bring in strategic partners from the European Union for joint development. Product development should be focused on those of small volume and high value-added such as cosmetics, fashion clothes, Chinese medicine, green food, upper-market toys, selected gift items, fashionable traveller's items and information related products. With correct direction and careful implementation, Macau can apply the results of research and development to production and modify the operation model of over 98% small and medium sized corporations. This will not be an easy task, but it's worth to pursue.

5.2.4 Information Technology Is Promising

Heading into the 21st century, the world's economy is in a process of transformation. Every country is actively developing new industries that can best reflect the local conditions and features. The mutual concern among different countries is how to establish new growth points, how to expand a solid base for economic development and what is a sustainable development strategy. Macau SAR's Government, entrepreneurs and intellectuals should adjust their ideas and concepts rapidly, conduct discussions timely, and well prepare themselves. Based on the development of new industries in the surrounding areas and the potential advantages of local industries, we can courageously face the challenges in the new age. We should actively cultivate new industries for the local territory, particularly the information industry. We are excelled in business environment, geographical location, systems and finance. Our biggest constraint will be the pool of talented people in the field of information technology. However, if we can formulate an appropriate policy, this constraint will be relieved. Nevertheless,

we can still proceed in this direction with the understanding of our constraint. We should actively pursue this objective by adjusting ourselves to the common development pattern of the world and building up this new industry in a practical manner. After a period of time, we should be able to establish a foundation to develop new technologies and applications, and transform and transfer the results of research and development into production. It is possible for us to develop an entirely new horizon of economy.

5.3 *Advantages and Opportunities*

In view of its strengths, Macau's economy has a number of advantages and opportunities.

- 5.3.1 Our society is highly stable, with a smooth transition of sovereignty. Our citizens highly recognize the return of sovereignty to the Motherland and have a strong sense of belonging, which is an important asset for our development.
- 5.3.2 The principle of "One Country, Two Systems" and the protection of the Basic Law shall continue to be effective. The Special Administrative Region of Macau is highly recognized and supported by the Central Government of China.
- 5.3.3 Macau has already achieved a rather outstanding development status. Since 1995, Macau has been included by international organizations in the list of high income countries and areas that ranked the top group in terms of the world's mini economy.
- 5.3.4 Macau's capability of adapting to the changes of the international market and its innovative ability should not be underestimated. Our younger generation of entrepreneurs are courageous in developing new business, and our citizens and young civil servants are hardworking and industrious who will strive for better results.

- 5.3.5 We have quite a long history in absorbing different religions, languages and people in a harmonious manner. We have a high degree of absorption and can learn the strengths of other people to improve ourselves.
- 5.3.6 We have an extensive overseas connection. There are thousands of overseas Chinese who have a strong relationship with Macau, which is an excellent network that will be continuously beneficial to us. There are also many macaense: Portuguese born locally and spread around the world. They will be a useful resource to Macau.
- 5.3.7 Macau's status as an international free port and its low taxation system are still a valuable asset that can be further utilized.
- 5.3.8 We can continue to contribute in bridging and soothing the relationship between the Mainland and Taiwan. This is an important function that will provide significant opportunities to Macau, not only for the time being but also a long period of time in future.
- 5.3.9 Macau is situated at an excellent geographical region that is rapidly growing in terms of the world's economy. It can learn from the experiences of the four "little dragons" (South Korea, Taiwan, Hong Kong and Singapore) and the countries in the South East Asia. It can also rely on the full support of China with rich resources across the border.
- 5.3.10 The historical connection with the European Union is an advantage to Macau. After the reunion with the Motherland, Macau can continue to play an active and important role to promote the relationship and cooperation between China and the European Union.
- 5.3.11 In the long run, there is a tremendous potential to develop relationship with Portuguese speaking countries. In the 21st century, Brazil will likely become a leader in the economy of Latin America. Mozambique and Angola in Africa will

also rise to a more important position. We should cherish the development with these countries.

5.4 *Overcome the Constraints by Fully Utilizing Our Strengths*

In view of its weaknesses, Macau's economy has various difficulties and constraints that should not be overlooked.

5.4.1 Macau has been suffering from economic slowdown for seven years since 1993 and negative growth for four years since 1996. The continuous negative growth has thrown a shadow over the confidence in our economy and will have an adverse psychological effect on investors and consumers.

5.4.2 Due to limited land area, small population and insufficient resources, which is difficult to improve fundamentally, Macau can hardly take the advantage of the economies of scale.

5.4.3 Due to the lack of a large deep water port, Macau is not able to develop modern ocean cargo business, which is a handicap to its performance as a free port.

5.4.4 The modern integrated transport network has not been completed. It hinders Macau's development into a modern logistics and distribution centre.

5.4.5 The overall education level of Macau people remains at a low level. The Government's Employment Survey of the First Quarter of 1999 indicated that 74.8% of the total 200,000 workers have an education below junior secondary level. This will become a major constraint to our economic growth in the age of new economy of information industry.

5.4.6 Traditional operation model has its pros and cons, and is not mutually exclusive of the modern model. Hence it is appropriate to preserve and promote

the traditions while accelerating the modernized process. It is not fair for some people to view tradition as an equivalent of conservation, since not every traditional organization is conservative while some non-traditional organizations may be so. There are always people who are obsessed by money and power and will pursue such by all means. However, they will be ultimately discarded by the community. There is no one in Macau who may claim that he is a representative of purely modern productivity. Due to the unique background and environment of Macau, we all have a different degree of conservation. Some may be conservative in one aspect while others may be so in another area. Some may be more conservative and some may be less. All in all, it is more critical for us to overcome the constraint of conservation.

5.5 Objectives that should be Accomplished in Short Term

- 5.5.1 A highly efficient, clean and accountable Macau Government that has a team of civil servants who work in accordance with the law, within their authorized power and have a strong sense of serving the citizens.
- 5.5.2 A prestigious image of Macau that is highly recognized by the world, especially the surrounding countries and areas, with a complete judicial system, law protection and a consciousness of legal system among citizens and relevant government departments.
- 5.5.3 A united, open minded and hardworking community, in which residents will not only consider their own interests but also others. People will not only be innovative but also cooperative. In addition, people will not only be willing to strive together to overcome difficulties but will also be happy to share successful results.

5.5.4 A team of modern entrepreneurs who have the courage and modern business philosophy to ride on the tide of new economy.

5.5.5 A well determined and practical concept and direction of development, with a mutual understanding among Macau people to insist on exploring the appropriate development pattern. The formulation of development strategy should not be the privilege of a chosen few.

5.6 *Seriously Resolve Some Major Issues*

5.6.1 Coordinate and synchronize both the economic and community development

As Macau's economy has established a solid foundation, our human development index (HDI) is generally maintained at a good level, with 0.86, 0.86 and 0.85 in 1995, 1996 and 1997 respectively. However, our culture, education, income, social security and health services have not caught up with the above index. Our residents are also weak in modern concepts, which require immediate attention for enhancement.

5.6.2 Focused versus diversified development

The recession in recent years has weakened the confidence of many people in Macau's future development. Our casino business has been one of our major economic contributors, and will further improve and grow. However, in the long run, it is not wise to focus on one single industry only. We should diversify our industries. Although there are difficulties and risks to develop other businesses, yet the advantages will still outweigh the drawbacks to make such a change.

5.6.3 Weak foundation and technology transfer

Macau has multiple strengths and yet various weaknesses. The critical issue

at present is our weak manufacturing foundation and insufficient capable workers. However, we can make use of our advantages and attract the Mainland's corporations and research institutes to apply their inventions and technologies to productions in Macau.

5.6.4 The relationship between internal and external environment

To expedite our development, we should fully utilize all possible internal and external resources. It is reasonable to assume that the external environment will continuously improve. However, the Government and people of Macau should primarily build up the success on the effective use of internal resources. This should be our determined belief.

5.6.5 The relationship between economic and non-economic measures

Economic development significantly relies on the correct understanding and application of the basic economic principles as well as the implementation of legal and economic measures. However, it has been proved that some non-economic measures are also very useful and should not be overlooked. These include the elevation of the cultural and moral quality of the citizens and the strengthening of their confidence in the future development.

5.6.6 Physical strength versus intellectual power

As we are heading into the age of a new knowledge-based economy, there is a change in the value between physical strength and intellectual power. We need to create a suitable environment to rapidly train up our local talents. On the other hand, we need to give a green signal to attract more capable persons to come to work in Macau. While we recognize the importance of intellectual power, we should not consciously or unconsciously underrate the labour workers. We should, as far as possible, provide opportunities for local young workers to upgrade themselves.

5.6.7 The relationship between the government and the community

During economic recession, every sector of Macau suffers. It is thus understandable to see the community have a high expectation and demand on the autonomous SAR Government. However, to really improve the economy, we need a joint effort of government guidelines and community support.

5.6.8 Traditional belief versus new economic concept

In the unique environment of Macau, every sector and household inherit the traditional belief and at the same time face the impact of new economic concept. Traditional values such as hardworking, industriousness, honesty and cooperation will never become obsolete. However, we should also pay attention to the main direction, basic principles and special features of the new economic concepts and thoughts. We have to actively adapt ourselves to the new environment, or we will be eliminated in this competitive market.

5.6.9 The relationship between boundless development and limited knowledge

There should not be a development limit or absolute saturation for any countries or economic entities. The only limit is our knowledge and understanding. We should therefore strive to advance this limitation and cultivate a consciousness of adaptation to the ever-expanding development pattern.

6. DEVELOPMENT STRATEGIES

6.1 *Strategy One -- Better Utilize Our Strengths*

6.1.1 Casino business

Casino business is the most important contributor to Macau's economy and a trump card of the Government. Under Article 118 of the Basic Law of the

Special Administrative Region of Macau, it says, "The Macao Special Administrative Region shall, on its own, make policies on tourism and recreation in the light of its overall interest." This indicates that the casino business can be further developed and enhanced. Also, in view of safeguarding the overall interest of the community, the Macau SAR Government has the full autonomy to formulate relevant policies. The casino business is now being operated in the form of franchise. This can ensure effective government control, but at the same time it has produced adverse effects. Due to the lack of competition, the business operator will be reluctant to modify its operation model but inclined to shift its profit and overlook the overall interest of the community. As the license right will soon expire, the public has strongly urged the Government to open up competition. It is expected that introducing a competition mechanism will promote the casino business, generate higher returns, increase government revenue, and create significant chain actions that will lead the territory into a new economic growth cycle. Hence, opening up the casino sector will be a significant test to the Government's ability in policy making as how to enforce effective supervision over this industry. We feel that three principles should be adhered: (1) Observe the authority prescribed by the Basic Law; (2) Respond to the overall interest of the Macau community; and (3) Improve rapidly the casino industry to international standard with Macau's unique features. As the casino business is so important to our overall economy, we should be careful in handling its future development.

6.1.2 A new and special administration model

As Macau had been ruled by Portugal for a long period of time, many social and economic issues remained unresolved when the territory reunited with China and the Government of Macau SAR commenced administration. We

need to set up a procedure to solve the remaining problems and handle the new issues. With the support of the Central Government and the authorization of the Basic Law, the Macau SAR Government is able to and must adopt an entirely new development concept. With its unique features, Macau should fully utilize its position in the global market and build up a new international cooperation and connection network. Also, in the overall interest of the community, the Government should establish a civil service that is for the people and convenient to the people. It should be innovative and creative to develop a new model of administration for the territory.

6.1.3 Mini economy

Macau is a typical mini economy. "For a mini economy, its scale can be small but its economic effect can be large. It has tremendous constraint in resources, but it can position itself in the international market. It has its own strengths, but it should not overlook its weaknesses. It should beware of its limitation, but it can overcome that by persistently improving and enhancing itself with its own hard effort. It may not have sufficient talented people, but it can intelligently deploy and fully utilize its existing manpower by creating an environment of fair competition and innovation. In summary, the development of a territory may not necessarily be bound by limited land resources or small population. For a mini economy, it should pursue a development based on its limitation of being small. As this fundamental limitation may not be changed, a mini economy should develop in a more delicate and concentrated manner with high quality and education so that it can earn the respect of other people."¹² The current critical issue is to maintain, vitalize and increase the existing productive

12. Jeong Wan Chong, *The Mini-Economy: Its Orientation and Development*, p. 36.

factors. In the new development process, high growth rate and high quality are equally important. We need to elevate the quality of economic growth as well as our living standard.

6.1.4 Unique culture

As a cultural exchange centre, Macau has its unique culture, which should be carefully developed and protected. The territory itself is a big museum and has a rich collection of both Chinese and European culture. As Macau has been a converging point of the East and West for a long period of time, it is qualified to apply to the United Nations for the title of "The World's Cultural Heritage". We should completely revise our city plan and mingle the historical zones with the newly developed districts. We should also turn the city into a tourist centre that is highly elegant and efficient, with multiple functions and themes. For example, we can develop a shopping, entertainment and food centre at Avenida de Almeida Ribeiro and its intersection with Rua dos Mercadores, Rua de Cinco de Outubro, Rua das Estalagens, Rua da Felicidade, Praça de Ponte e Horta, and Praça do ex-Casino Flutuante. We can develop an integrated traditional cultural centre at the district from Rua de S. Paulo, Rua da Palha to Rua de S. Domingos. We can develop a conference and exhibition centre and an integrated modern Chinese and Western cultural centre at NAPE (Zona de Aterro do Porto Exterior), Sovereignty Hand-over Square, Centro Ecumenico Kun Iam and Parque Dr. Carlos D'Assumpcao. Also, we should fully utilize the relics and remains of the celebrities such as Dr Sun Yat Sen, Cheng Guan Yin and Luis de Camoes. We should scientifically categorize different districts in the city and add statues, galleries, flowers, lawn and pedestrian zones. We should develop more scenic spots, shopping centres, and facilities and venues of food, exhibition, entertainment and leisure. We should rapidly establish Macau as a tourist centre

that has rich cultural contents. We should also expedite the development of Lagos da Praia Grande as a new shopping, cultural and tourist district that can generate economic benefits.

6.2 Strategy Two -- Promote Regional Cooperation

6.2.1 Promote a fair and mutually beneficial cooperation with the Pearl River Delta Region that has Guangzhou as the centre

We should properly and flexibly position ourselves in the Pearl River Delta Region. We should serve the surrounding areas and achieve a complementary effect. As seriously limited by the physical environment, Macau should promote cooperation and fully utilize the advantages of the region. For example, we can make use of the region's cheap labour, transportation and communication network, educated and trained personnel, tourism resources and new economy such as the rapidly growing information industry. These advantages can make up for our shortfalls.

6.2.2 Macau and Zhuhai are born to be partners. Both cities can complement each other and have a broad base of mutual benefits. The two cities can expand their existing cooperation in infrastructure, tourism, business, trading, new industries development and personnel training. As the cooperation is mutually beneficial to both cities, we should adhere to the principle of "proper allocation of resources, interactive business development and mutual benefits", which will fulfill the common objective of residents in both cities.

6.2.2.1 We should enhance the understanding of mutually beneficial cooperation between Macau and Zhuhai, quickly determine the cooperation base and select testing points for breakthrough. The joint development of Hengqin Island by

both cities is critical and urgent. If Hengqin can be established as a special region within the Special Administrative Region and has its rights of ownership and administration separate, Macau and Zhuhai can fully cooperate and develop this island. It will have tremendous positive impact to both cities. Also, Macau and Zhuhai should strive to enhance the cooperation in free trade zones, export processing zones and new industrial development zones.

6.2.2.2 Zhuhai is actively developing its higher education, which will be a challenge as well as an opportunity to Macau that has recently developed its higher education. If Macau can enhance its research and management capability and combine the unique strengths of both, the higher education of Macau and Zhuhai will become a mutual advantage for both cities.

6.2.2.3 Macau and Zhuhai should work together to improve the customs procedures. As an entity under the policy of "One Country, Two Systems", Macau should have its own customs and inspection points. However, the customs procedures should be simplified as much as possible to ensure an efficient flow of man, goods and information.

6.2.3 Actively cooperate with Hong Kong and play a complementary role

It is undeniable that Hong Kong is a very important city. Due to various factors such as geographical proximity, historical background and social system, Macau and Hong Kong can fully cooperate. The key for Macau is to flexibly position itself, properly perform its role and actively cooperate on the allocation and coordination of resources, technologies and trained personnel.

6.2.4 Fully cooperate with Taiwan

Macau has been the place where Dr Sun Yat Sen started his revolution career. Also, it is the second special administrative region in China that guarantees the implementation of capitalism for another 50 years. With the existing

cooperation base, Macau can properly position itself under the principle of "One Country, Two Systems" and further enhance the cooperation with Taiwan.

- 6.2.5 Macau should properly borrow and utilize the capital, technologies, information and management experience from Asian developed countries like Japan, South Korea and Singapore.

The above three countries have different strengths in economy and technologies. We can, under the name of "Macao China" as prescribed by the Basic Law, actively develop connection with them to expand our external network.

- 6.2.6 Develop cooperation with ASEAN and other regions and countries in Asia

A strong and united entity, the Association of South East Asian Nations (ASEAN) has become a significant member of APEC. Due to the geographical proximity and the well established cooperation base, Macau should further enhance the economic and business cooperation with the ASEAN.

6.3 *Strategy Three -- Enhance Ties with the European Union and Explore the Portuguese World*

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- 6.3.1 Due to the historical background, Macau has long been connected with the European Union. Its unique status is highly recognized by the European Union. "For the European Union, Macau shall continuously perform a more significant role than Hong Kong."¹³ There is a well established cooperation base between Macau and the European Union on business and trading, personnel exchange,

13. See European Commission, *The EU and Macau: Beyond 2000, COM (1999) 484 final*.

languages, religions, cultures and arts. We should strive to consolidate and further expand the cooperation with the European Union.

- 6.3.2 There are more than ten countries or regions that speak Portuguese. With the same language, Macau has an advantage to link up with them. Occupied half of the area and population of the Latin America, Brazil is a developing country that has tremendous potential. To rapidly establish a stable cooperation with Brazil should be Macau's chosen tactic.

6.4 Strategy Four -- The Critical Issue to Enhance International Competitiveness

- 6.4.1 "The future competition is a competition for talented people and a competition of the quality of people among different countries."¹⁴ Hence, when considering how to improve our international competitiveness, we should first of all focus on how to effectively enhance the quality of our people. In a competitive environment and a competitive age, we should have the courage and intelligence to participate in the competition. In a lawful environment and society, we should have the courage to compete with other people at an equal starting point.

- 6.4.2 Refresh our entrepreneurs' thinking

Through the hard work of over two generations, Macau has achieved an outstanding performance for many years. Our new generation of entrepreneurs who are active in many sectors have mostly received post secondary education.

14. "Conversation between Chairman Jiang Zemin and American Reporters", *People's Daily (Overseas Edition)*, 18 May 2000.

They have a good understanding of the international market and can easily adapt to the new economy. However, as a traditional society, Macau has many corporations that are still managed mainly in a family style. They are limited by many factors, in particular the operation scale. Generally, most established and leading entrepreneurs are more conservative. However, the present situation is urging them to actively upgrade themselves, change a new way of thinking, and keep up with a sense of competitiveness, risk management, law spirit, innovative ideas and international vision. Also, it urges them to cultivate a modern and unique Macau management style, and introduce new concepts, ideas and philosophy. With Macau's present environment and conditions, we should by the timeline set by this report nurture and train up a group of new entrepreneurs who have a solid financial strength (with assets worth over MOP 100 million) and the knowledge of modern management. They will significantly contribute to Macau's future economic development.

6.4.3 *Professionals to make insightful suggestions*

Macau is not highly developed yet and has only a limited number of professionals in different sectors. Fortunately, some young entrepreneurs are professionals people themselves. Also, in the last twenty years, a group of academics and experts have come to Macau and made here as their home. They are the community's valuable assets, yet their contribution has not been fully recognized. Under Macau's new environment, they will have a much bigger room to make contribution. If they can actively voice out their opinions and make insightful suggestions, they will be gradually recognized by the community. "Basic research is the driving force of civilization, and the origin and support of

technology advancement and economic growth."¹⁵ This principle will be understood and accepted by the community of Macau.

6.4.4 Workers of all industries to upgrade themselves

Due to the new model of economy, our society is undergoing a dramatic transformation and new industries that are technology oriented, such as the information industry, have accelerated their development. Under such situation, all workers in different sectors, whether looking for jobs or planning future careers, should strive to upgrade themselves. They should continuously learn new knowledge and enhance their skills. In addition to basic working skills, they should also learn and master foreign languages, computer knowledge and technical skills such as driving and maintenance work. This will help them upgrade themselves and enhance their value to the companies.

6.4.5 Promote the ethical, cultural and professional quality of Macau people

We should strive to upgrade our young and middle-aged workers to senior secondary or even higher education level in 20 years. This should be done by providing training and evaluation for the working population through various levels and channels. The Government, private organizations and individuals should work together to improve our education and administration system. In accordance with the Basic Law, we should introduce 12 years free education for our children in the near future and prevent undesirable dropouts in primary and secondary schools. We should also raise the ethical and cultural standard of Macau people to enrich the quality of our pure and simple community. This can be achieved by introducing appropriate rules and regulations, law enforcement and self-restraint.

15. "Conversation between Chairman Jiang Zemin and American Reporters", *People's Daily (Overseas Edition)*, 18 May 2000.

6.4.6 Care about the less privileged community members

We are striving towards the goal of establishing Macau as a prestigious international city. We need therefore to ensure the administration of the society is in a fair, orderly and efficient manner. We should also care about the less privileged community members, reduce the proportion of the low income class, and help more people become rich. These are critical issues that we should seriously deal with.

We have recently expanded our social welfare services through both the Government and private organizations, which has alleviated the difficulties of the low-income families. However, due to economic recession, they are still suffering tremendously. This may easily cause new social problems. We should therefore systematically handle all the social issues such as providing the minimum social security and children education and arrangement of re-entry into the community for the low income families, the handicapped, mentally retarded, victims of industrial accidents, and families with relatives in prison.

6.5 *Strategy Five -- Promote English Learning and Build up an Environment for the Development of New Economy*

6.5.1 Promote English learning and create a better environment for communication

As the most popular language in the world, English has established a superior status in international business and cultural exchange. For countries that wish to go internationalized, English proficiency has become an important key. During the ruling of Portugal, Macau has failed to establish an English environment. However, ignoring the importance of English today means losing tremendous business opportunities. Also, without an English environment, Macau is unlikely

to go internationalized. Hence, we should put forward this issue for public discussion and encourage every household to place emphasis on learning English. In fact, promote English and appropriately develop Portuguese education are not contradicting to each other. However, if we have to choose between English and Portuguese, we should prefer English.

6.5.2 To adapt to the age of new economy, Macau should further improve relevant factors to cope with the changes.

6.5.2.1 The Macau SAR Government should introduce simple policies and clearly defined rules. It can study the features and procedures of commercial activities in Hong Kong and revise the commercial law accordingly.

6.5.2.2 The Government should enhance the quality of the civil servants and systematically provide training for the senior officials. It should improve the efficiency of administration and improve the service quality. By adopting flexible and effective measures, it should actively attract foreign investment, technologies and talented people. To attract more professionals, the Government can consider allowing the highly educated professionals, such as those with Master degrees or above in information technology, to become permanent residents of Macau immediately upon their application.

6.5.2.3 The Government should establish institutions, such as Technologies Development Council, to focus on the development of science and technologies. It should also consider the setting up of investment fund for new industries, which can expedite the development in this area and enhance the territory's function of modern financial services. In addition, we urge the Government to quickly inform the public its policy on the establishment of international schools and services to cope with the need of expatriates and foreign investors.

6.5.2.4 We should invite academic and research institutions, such as University of

Macau and Macau Productivity and Technology Transfer Center, to set up research centres for the study of information technologies and biochemical technologies. This will nurture capable persons for Macau's new economy. In addition, it will expedite the application of the results of research and development conducted inside and outside of the territory.

6.6 Strategy Six -- Professionally Plan the Reclaimed Area of Coloane and Taipa

6.6.1 The reclaimed area will soon make Coloane and Taipa become connected as one single piece of land, which will be approximately one fourth of the total area of Macau. When fully developed, this new city can become an area that concentrates on commercial activities. This will clearly define the functions of different districts in Macau and strengthen its image as a prestigious international city. The Macau SAR Government should quickly define the objectives and functions of this new city. When these are determined, the Government should proceed with global public tender and commence development for the new city as early as possible.

6.6.2 To coincide with the above development, the Government should simultaneously urge Zhuhai to jointly develop Hengqin Island. It should also urge the construction of a transport network of express train, light rail and highway in Guangzhou and Zhuhai.

6.6.3 To synchronize with the above development, the Government should actively discuss and negotiate with Hong Kong on the building of a bridge connecting Coloane of Macau and Lantau Island of Hong Kong, which has the shortest distance between the two cities.

6.7 *Strategy Seven -- Expand Higher Education for New Growth Points*

6.7.1 Education is an investment that generates two-fold benefits

Almost every modern and developed country has a well established education system, and their higher education that aims to train up professionals of different disciplines is an industry that may generate tremendous economic benefits. Western countries, such as the US, do not only receive large amount of revenue from foreign students, but also recruit the distinguished students to join their working population. It has become a steady supply of talented people to these countries and they can thus continue to extend their cultural influence to other countries.

6.7.2 Emerging higher education in Macau

Macau currently has various higher education institutions, including the University of Macau, Instituto Politecnico de Macau, Escola Superior das Forças de Segurança de Macau, Instituto de Formação Turística, Asia International Open University (Macau), Inter-University Institute of Macau, Universidade de Ciência e Tecnologia de Macau, Kiang Wu Nursing College of Macau, and Macau Institute of Management, with a total of about 10,000 registered and active students. With a population of 430,000, Macau has each year about 2,000 secondary school graduates. Over 80% of them can pursue local university degrees or overseas studies in the Mainland, Taiwan or other countries. On the face of it, there seems no more room for Macau to expand its higher education. However, we can study the issue from another angle. There is a high dropout rate in the local primary and secondary schools, but with the joint effort of the community, we can prevent this and expand the number of senior secondary students. In addition, we can look beyond the local community. The Mainland

has been actively expanding its higher education. Yet each year there are about 50% Mainland students, a figure of thousands and millions, that cannot enroll in universities. If we can better design our syllabus and programs, improve our teaching quality and enhance our image, we should be able to attract a few thousands of students from nearby cities to come to study in Macau.

6.7.3 Develop into an integrated professional training base

There are two directions for developing course programs for our higher education. First, we can utilize our strengths and set up professional programs in the disciplines of business management, tourism and economics, social sciences, Portuguese language and literature, Portuguese law, and media communication. Secondly, we can selectively set up new programs in the disciplines of international relationship, Latin language, foreign languages and literature, history, economics of Hong Kong and Macau, regional economics, and even literary theories, philosophy, information technology, fashion design, and modern advertising production. The qualified institutions and organizations should set up training centres and introduce new higher degree programs and short-term part-time certificate courses for the working professionals. The objective is to make Macau become a leading professional training base in the Far East and Asia Pacific Region in 10 years that may cultivate talents for the local community and surrounding areas. With our hard effort, this should be an achievable goal.

6.8 *Strategy Eight -- Fully Support Small and Medium Sized Enterprises*

6.8.1 Macau is a typical mini economy, which can be reflected by the fact that small and medium sized enterprises make up 98% of the total 15,000 corporations.

These small and medium sized enterprises have made significant contribution to Macau's economy in the past, and will still be a major contributor in the future. However, they are currently suffering from the economic recession.

- 6.8.2 To assist the small and medium sized enterprises will therefore create a positive effect for economic recovery, social stability and improvement of unemployment. To this end, the Government may properly reduce tax, provide loans at a low interest rate (the interest difference can be compensated by the Government), re-design the function of each district, centralize training, and share resources. The Government should form a dedicated department to follow up on these.

7. FACTORS TO ENSURE FUTURE RAPID GROWTH

7.1 *Enhance the Quality of Macau People and Establish a System that Based on People, Knowledge and Technologies*

- 7.1.1 High quality of people and community groups are the major driving force for the future economic and social development. It's also the resources for a community to compete in the international market. Thus, a modern society should recognize and care about the community members and their living quality. It should also provide equal opportunities for each individual and firmly establish the belief of "every one has his value" among the community members. It should, as far as possible, upgrade the community members so that they can devote their intelligence, make more contributions and share the fruitful results with the society.

7.1.2 To realize one's own value, an individual has to continuously seek new knowledge and insist on studying the modern information system. This shall be a continuous process and is particularly important in this information age. It applies to both successful persons and those in an adverse situation.

7.1.3 We should master the time, modern technologies and our own destiny. We can do this, as we have only used our brain in a very limited manner. Based on the quality of each person, we should try to develop our potentials. In the face of the overwhelming information in this age, we should not be resisting, offending or rejecting. We should understand that the ability in mastering science, technologies and other knowledge varies with different persons. As long as we try our best effort, we should all be able to master our lives and expand the room of development.

7.1.4 Based on the forecast in Exhibits 1, 2, 3 and 4, if we wish to attain the status of a moderately developed country in 20 years as measured by the index stated in Section 3.2.1, we have to maintain an average annual growth rate of over 5.8% and control our population in the range of 500,000 to 600,000. If the average growth rate of GDP is below 4.5% and the population increases by 2.5-3% or above, then our real growth of GDP per capita will be very insignificant. Thus, we must focus on the enhancement of the quality and composition of our people and a major breakthrough in our products and services.

7.2 The Co-existence of Multi Cultures is a Unique Feature and Valuable Asset of Macau

We have a long history and a rich culture of languages, religions, arts, food and custom in Macau. Combined with an international free port, we have a relaxed

community that harmoniously mingles the traditions of the East with the West. As we move forward into a new age and a new environment, this harmonious combination can promote the sense of belonging and enhance the confidence among Macau residents. We should not overlook or eliminate this positive factor, instead we should try to enhance it from time to time.

7.3 Continue to Utilize the Foundation Established by Traditional Organizations

7.3.1 Both traditional business organizations and workers organizations have made undeniable significant contribution to Macau's steady development. During the transition period and in the initial stage when Macau returned to the Motherland, these organizations have performed as a steady force of the community. As we are now moving into the information age of new economy, they will no doubt continue to play an important role.

7.3.2 As many new organizations have emerged to compete in the market in this new age, the old organizations should rapidly and continuously adjust and respond to the new situation. They should introduce new talents to improve the management and make the organizations more active. On the other hand, the Government should promote fair competition and introduce a mechanism that encourages relaxed and harmonious cooperation. Under the principles of "Macau to be governed by Macau people" and constructing Macau in a scientific and systematic manner, we should promote solidarity, concerted effort and joint development. In addition, we should not feel complacent about the current system of allocation of benefits and lag behind the trend of new thoughts.

7.4 *Cultivate and Expand the Middle Income Class*

7.4.1 The experience of modern countries, particularly those developed countries, has clearly indicated that as a society makes progress, its major composition will naturally shift from low income class to middle income class. The middle income class in all developed countries does not only expand in numbers but their vitality and functions are also fully recognized by the society. The major contribution of the middle income class does not come from their economic strength but their professional knowledge, which they can enhance the competitiveness of a community. They are the group of people that are most innovative, and can significantly contribute to their corporations, organizations, countries and regions.

7.4.2 After the implementation of open-door policy for over twenty years, China has seen a new group of middle income class. Six out of the ten categories of rich people in China as defined by the theorists are those professional people with expertise and special skills. They are: senior executives of multi-national corporations; project managers of non-financial or real estate companies; contractors and shareholders with technologies; actors, singers, fashion models, writers and athletes; lawyers, managers, advertising producers and accountants; and economists and senior government officials who frequently deliver lectures and provide evaluation services. There are also a few people who have become rich through inappropriate means, such as those illegal operators and corrupted government officials. It is expected that those who utilize knowledge and technologies to become rich will expand in numbers and ultimately become the majority of the community. This will drive the country towards the goal of mutually rich among the people.

7.4.3 Does Macau have the middle income class? Will they become the leading force of the society? It is a topic that worth to study and it's a very practical issue. There are not a large number of rich people in Macau, as can be seen in the fact that small and medium sized enterprises make up 98% of the total 15,000 corporations. Most operators of which do not have a large quantity of assets, and regardless of whether it's measured by dollar amount or professional training, they are far from the definition of the middle class. Those qualified are people who have the post secondary education with professional qualifications, such as those who have completed overseas studies and the second generation of young entrepreneurs. The group also consists of lawyers, medical doctors, engineers, accountants, auditors, surveyors, advertising designers, painters, teachers of secondary schools and universities, singers, editors, reports, academics, middle and senior government officials, and those who become successful by self study. They exist in our community and are quite active. Some of them are very successful and have been recognized by the society. However, generally, the middle income class of Macau has not fully developed. They are still scarce in number and their overall quality remains to be improved. Also, they are not active enough to project an outstanding image in the community. In the next 20 years, as Macau's economy transforms into a higher status, our middle income class will also become the most active group. They will not only become the backbone in the government and commercial sector, but also the leading force of the workers organizations.

7.5 *Recognize the Importance of Innovation*

7.5.1 Innovation means the best allocation and utilization of existing resources and the transformation of human intelligence. It is also the major force to promote competitiveness in the international market. Without innovation, we will not be able to transform the structure of our economy, and our society will not be able to develop. We should apply innovation in all areas, from systems to technologies and from management to concepts. Innovative concepts are particularly important for us to maintain our advantages in a competitive market.

7.5.2 Innovation is not just purely creating something new. Rather, it's a natural response to the new challenges and environment. If we adopt Don Quixote's attitude of nihilism to handle our current issues, we will not achieve anything. Hence, we should adopt a more positive and active attitude. If we cannot adapt ourselves completely to the new situation, we should at least change partially. If we cannot obtain immediate results, at least we should do something now.

7.5.3 It is not practical to demand every manufacturing and service sector in Macau to initiate innovation for breakthroughs. However, our mission should be establishing a brand new school of thoughts and promoting innovative ideas.

7.6 *Resolve Ecological Issues*

7.6.1 We shall build up a green city. Economic growth should not be in the expense of damaging the environment or lowering the environment standard. We have a serious air, sea and noise pollution in Macau. Our trees have been damaged and we are short of greenery space. We should urge the Macau SAR Government to enact and enforce the law for environmental protection. We should also liaise

with the surrounding areas to jointly protect the sky and the earth. Our next generations should have a quality environment to live.

7.6.2 We should alert the community of the imbalance of ecological system and its consequences. By the theory of Green GDP, our real annual growth is the GDP less the intangible loss in environment (such as pollution and deterioration) and the intangible loss in society (such as disease, unemployment, crime, uncontrolled population growth and mismanagement). These two intangible losses cause serious damage to Macau every year. In this information age, we should introduce new orientation and standard to the traditional concept of economy, development, environment and representation. A serious study of the green issue will provide enlightenment for us. Therefore we suggest the statistics department of the Government to consider the application of the Green GDP theory.

The Relationship between Cultural Development and Representation

Stage Item	Hunting	Agriculture	Industry	Information
Period	2 Million B.C.- 1,000 B.C.	1,000 B.C. - the mid-18th century	The mid-18th century - the 20th century	Present——
Social Development	Primitive society; small population	Feudal society;growing population	Capitalism society and Socialism society; booming population	Harmonious and sustainable development among natural environment, economy and society. During economic growth, carefully control birth , protect environment and natural resources, and enhance living quality
Economic Development	Survival as the primary objective;fishing and hunting	Self sufficient;self supply	Market economy and planned economy; Pursue GDP growth	
Ecological System	Low utilization of natural resources; primitive environment	Relatively low utilization of natural resources; harmonious environment	High consumption of non-recoverable resources; environment seriously deteriorating	
Attitude towards nature	Worshipping nature	Nature shall conquer man	Man shall conquer nature	Nature and man harmoniously co-exist
Environmental problems	Non-existent	Woods chopped;soil fertility reduced;soil eroded	From global environmental pollution to global environmental disasters	Global environmental disasters remain to resolve
Representation	Living together; physical strength; barbarous	Religions; population; morality; power; nature; superstition	Machines; natural resources; science and technologies; transport; market	Information; innovation; quality of people; environmental protection; sustainable development

Based on the table compiled by Zhou Yongzhang, "Regional Sustainable Development Requires Image Representation" in *Anthology of the Seminar on Sustainable Development -- Cooperation among Guangdong, Hong Kong and Macau*, April 2000, p. 210.

7.7 *Establish a New Generation of Chinese Enterprises*

In the past, Chinese enterprises have played a significant role in Macau's economy, as they constituted a major portion in many leading industries.

State-owned enterprises and joint ventures of Chinese and local capital are now both facing a new challenge. Being the operating entities that have interface with the international market, they need to pursue economic returns as well as exploring the global competition pattern. In addition, they are critical for the steady and stable development of the Special Administrative Region of Macau, which adopts the policy of "One Country, Two Systems". To accommodate with the new environment, we should re-define the Chinese enterprises. Besides the traditional Chinese enterprises, the Government should encourage more non-state owned enterprises to extend their operation to Macau, which should gradually become the core group of future Chinese enterprises. On the other hand, Chinese enterprises should actively position themselves and perform their functions for further development.

7.8 *Motivate the Talents of the Community and Establish a Professional Research Centre of Government Policies*

7.8.1 The Government should establish a modern consultation mechanism and make the policy-making procedures more systematic, pragmatic and visionary. This is critical in modern politics and public administration.

7.8.2 The Government should enhance the accuracy and fairness of the administrative procedures. Also, it should seriously try its best effort to collect public opinions and effectively establish a mechanism that can motivate the talents of the community.

- 7.8.3 Inherited the original structure from the previous Portuguese and Macau government, the current SAR Government has streamlined and realigned its structure. However, there is still room for improvement. On the other hand, the Government has not yet set up a policy research centre, which is a very important organization that can strengthen the government administration. This deserves serious study by the Government.
- 7.8.4 Reorganize and re-establish various consultation committees to assist the Government to discover and realize the potential of the community. However, this should be synchronized with the establishment of a professional policy research centre to achieve the best results.

8. CONCLUSION

This report compiles our studies on Macau and its future development, in view of the new age and the new environment. The whole project, from planning to action and from the beginning to its completion, has integrated the devoted effort of both the management and the members of the Macau Development Strategy Research Centre and the Macau Association of Economic Sciences. It has also consolidated valuable comments from people in all sectors who care about Macau and its development. Hence, the value of this report is that it reflects an actual collective study on various local issues. It also represents a result of a highly autonomous action taken by Macau people who wish to master their own destiny by exercising the democratic rights under the principle of "Macau to be governed by Macau people". This report serves as a base from which they can build up a brand new culture and school of thoughts.

As the development pattern cannot be fully understood yet, we can only attempt to accomplish our goal by prudently exploring. Hence this report should only be viewed as an instrument to test the water. It is far from precisely identifying the depth of the issues or determining the correct direction. There are still a lot of work that need to be done. However, we sincerely hope that this report can motivate more talented people to voice out their insightful opinions and the community can soon reach a mutual understanding. Then, under the leadership of the Macau SAR Government, we can very soon walk out of the deep valley of recession and move forward to a new plateau of economic growth and social development.

Finally, we are deeply indebted to A Economia e Financas de Regiao Administrativa Especial de Macau, Os Transportes e Obras Publicas de Regiao Administrativa Especial de Macau, Fundacao Para a Cooperacao e o Desenvolvimento de Macau, and Fundacao Macau that have fully supported this research. We wish to thank relevant government departments and all community members who have provided assistance to this study. We would also like to express our appreciation for all the people who have substantially contributed to the community. Tomorrow's Macau belongs to every one of us, so let us strive today to build a better tomorrow that we will all feel proud of.

Exhibit 1.1 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	442,857	524.09	119,062	533.72	121,252
2001	448,214	558.15	125,277	557.74	125,184
2002	453,571	594.43	131,834	582.84	129,263
2003	458,929	633.07	138,755	609.07	133,494
2004	464,286	674.22	146,059	636.47	137,882
2005	469,643	718.04	153,768	665.12	142,434
2006	475,000	764.72	161,906	695.05	147,155
2007	480,357	814.42	170,496	726.32	152,053
2008	485,714	867.36	179,565	759.01	157,133
2009	491,071	923.74	189,139	793.16	162,403
2010	496,429	983.78	199,247	828.86	167,870
2011	501,786	1,047.73	209,921	866.15	173,541
2012	507,143	1,115.83	221,191	905.13	179,424
2013	512,500	1,188.36	233,093	945.86	185,528
2014	517,857	1,265.60	245,663	988.43	191,861
2015	523,214	1,347.87	258,938	1,032.91	198,431
2016	528,571	1,435.48	272,960	1,079.39	205,248
2017	533,929	1,528.78	287,771	1,127.96	212,322
2018	539,286	1,628.16	303,417	1,178.72	219,661
2019	544,643	1,733.99	319,945	1,231.76	227,277
2020	550,000	1,846.69	337,406	1,287.19	235,180
Accumulative GDP Growth (compare with 2000)		352%	283%	241%	192%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 550,000, annual real growth rate of GDP 4.5% and annual GDP deflator growth rate +2%.

Exhibit 1.2 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	442,857	531.47	120,739	541.38	122,992
2001	448,214	573.99	128,830	573.87	128,804
2002	453,571	619.90	137,484	608.30	134,910
2003	458,929	669.50	146,739	644.80	141,325
2004	464,286	723.06	156,639	683.49	148,066
2005	469,643	780.90	167,229	724.49	155,150
2006	475,000	843.37	178,559	767.96	162,594
2007	480,357	910.84	190,681	814.04	170,416
2008	485,714	983.71	203,652	862.88	178,638
2009	491,071	1,062.41	217,531	914.66	187,279
2010	496,429	1,147.40	232,385	969.54	196,362
2011	501,786	1,239.19	248,282	1,027.71	205,910
2012	507,143	1,338.33	265,297	1,089.37	215,946
2013	512,500	1,445.39	283,510	1,154.73	226,498
2014	517,857	1,561.02	303,006	1,224.02	237,591
2015	523,214	1,685.91	323,879	1,297.46	249,255
2016	528,571	1,820.78	346,226	1,375.31	261,518
2017	533,929	1,966.44	370,154	1,457.83	274,414
2018	539,286	2,123.76	395,775	1,545.29	287,975
2019	544,643	2,293.66	423,212	1,638.01	302,236
2020	550,000	2,477.15	452,595	1,736.29	317,235
Accumulative GDP Growth (compare with 2000)		466%	375%	321%	258%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 550,000, annual real growth rate of GDP 6.0% and annual GDP deflator growth rate +2%.

Exhibit 1.3 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	442,857	538.85	122,416	549.05	124,732
2001	448,214	590.04	132,434	590.22	132,475
2002	453,571	646.09	143,292	634.49	140,719
2003	458,929	707.47	155,063	682.08	149,496
2004	464,286	774.68	167,823	733.23	158,844
2005	469,643	848.28	181,658	788.23	168,798
2006	475,000	928.86	196,659	847.34	179,400
2007	480,357	1,017.11	212,927	910.89	190,692
2008	485,714	1,113.73	230,569	979.21	202,720
2009	491,071	1,219.54	249,704	1,052.65	215,534
2010	496,429	1,335.39	270,459	1,131.60	229,185
2011	501,786	1,462.25	292,974	1,216.47	243,729
2012	507,143	1,601.17	317,400	1,307.71	259,227
2013	512,500	1,753.28	343,901	1,405.78	275,740
2014	517,857	1,919.84	372,655	1,511.22	293,338
2015	523,214	2,102.23	403,858	1,624.56	312,094
2016	528,571	2,301.94	437,720	1,746.40	332,083
2017	533,929	2,520.62	474,470	1,877.38	353,389
2018	539,286	2,760.08	514,358	2,018.18	376,101
2019	544,643	3,022.29	557,654	2,169.55	400,312
2020	550,000	3,309.40	604,655	2,332.26	426,123
Accumulative GDP Growth (compare with 2000)		614%	494%	425%	342%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 550,000, annual real growth rate of GDP 7.5% and annual GDP deflator growth rate +2%.

Exhibit 2.1 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	445,238	524.09	118,741	533.72	120,924
2001	452,976	558.15	124,280	557.74	124,189
2002	460,714	594.43	130,117	582.84	127,579
2003	468,452	633.07	136,266	609.07	131,100
2004	476,190	674.22	142,746	636.47	134,755
2005	483,929	718.04	149,574	665.12	138,549
2006	491,667	764.72	156,769	695.05	142,487
2007	499,405	814.42	164,352	726.32	146,573
2008	507,143	867.36	172,344	759.01	150,814
2009	514,881	923.74	180,767	793.16	155,214
2010	522,619	983.78	189,645	828.86	159,779
2011	530,357	1,047.73	199,003	866.15	164,515
2012	538,095	1,115.83	208,869	905.13	169,429
2013	545,833	1,188.36	219,269	945.86	174,525
2014	553,571	1,265.60	230,234	988.43	179,811
2015	561,310	1,347.87	241,796	1,032.91	185,294
2016	569,048	1,435.48	253,987	1,079.39	190,981
2017	576,786	1,528.78	266,842	1,127.96	196,880
2018	584,524	1,628.16	280,400	1,178.72	202,998
2019	592,262	1,733.99	294,699	1,231.76	209,343
2020	600,000	1,846.69	309,780	1,287.19	215,924
Accumulative GDP Growth (compare with 2000)		352%	260%	241%	179%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 600,000, annual real growth rate of GDP 4.5% and annual GDP deflator growth rate +2%.

Exhibit 2.2 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	445,238	531.47	120,414	541.38	122,660
2001	452,976	573.99	127,806	573.87	127,780
2002	460,714	619.90	135,692	608.30	133,152
2003	468,452	669.50	144,107	644.80	138,790
2004	476,190	723.06	153,086	683.49	144,708
2005	483,929	780.90	162,668	724.49	150,918
2006	491,667	843.37	172,894	767.96	157,435
2007	499,405	910.84	183,810	814.04	164,275
2008	507,143	983.71	195,462	862.88	171,454
2009	514,881	1,062.41	207,903	914.66	178,989
2010	522,619	1,147.40	221,185	969.54	186,899
2011	530,357	1,239.19	235,369	1,027.71	195,201
2012	538,095	1,338.33	250,517	1,089.37	203,916
2013	545,833	1,445.39	266,695	1,154.73	213,065
2014	553,571	1,561.02	283,976	1,224.02	222,669
2015	561,310	1,685.91	302,437	1,297.46	232,753
2016	569,048	1,820.78	322,160	1,375.31	243,340
2017	576,786	1,966.44	343,233	1,457.83	254,457
2018	584,524	2,123.76	365,752	1,545.29	266,130
2019	592,262	2,293.66	389,817	1,638.01	278,388
2020	600,000	2,477.15	415,538	1,736.29	291,260
Accumulative GDP Growth (compare with 2000)		466%	345%	321%	237%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 600,000, annual real growth rate of GDP 6.0% and annual GDP deflator growth rate +2%.

Exhibit 2.3 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	445,238	538.85	122,086	549.05	124,396
2001	452,976	590.04	131,381	590.22	131,422
2002	460,714	646.09	141,425	634.49	138,885
2003	468,452	707.47	152,281	682.08	146,815
2004	476,190	774.68	164,016	733.23	155,240
2005	483,929	848.28	176,703	788.23	164,193
2006	491,667	928.86	190,420	847.34	173,708
2007	499,405	1,017.11	205,254	910.89	183,820
2008	507,143	1,113.73	221,297	979.21	194,568
2009	514,881	1,219.54	238,651	1,052.65	205,993
2010	522,619	1,335.39	257,425	1,131.60	218,140
2011	530,357	1,462.25	277,737	1,216.47	231,054
2012	538,095	1,601.17	299,717	1,307.71	244,785
2013	545,833	1,753.28	323,505	1,405.78	259,387
2014	553,571	1,919.84	349,251	1,511.22	274,915
2015	561,310	2,102.23	377,121	1,624.56	291,432
2016	569,048	2,301.94	407,294	1,746.40	309,000
2017	576,786	2,520.62	439,963	1,877.38	327,688
2018	584,524	2,760.08	475,339	2,018.18	347,570
2019	592,262	3,022.29	513,651	2,169.55	368,724
2020	600,000	3,309.40	555,147	2,332.26	391,233
Accumulative GDP Growth (compare with 2000)		614%	455%	425%	315%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 600,000, annual real growth rate of GDP 7.5% and annual GDP deflator growth rate +2%.

Exhibit 3.1 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	447,619	524.09	118,422	533.72	120,599
2001	457,738	558.15	123,300	557.74	123,209
2002	467,857	594.43	128,443	582.84	125,938
2003	477,976	633.07	133,865	609.07	128,789
2004	488,095	674.22	139,580	636.47	131,766
2005	498,214	718.04	145,602	665.12	134,870
2006	508,333	764.72	151,948	695.05	138,105
2007	518,452	814.42	158,636	726.32	141,475
2008	528,571	867.36	165,681	759.01	144,984
2009	538,690	923.74	173,105	793.16	148,635
2010	548,810	983.78	180,925	828.86	152,433
2011	558,929	1,047.73	189,165	866.15	156,383
2012	569,048	1,115.83	197,846	905.13	160,488
2013	579,167	1,188.36	206,993	945.86	164,754
2014	589,286	1,265.60	216,629	988.43	169,186
2015	599,405	1,347.87	226,782	1,032.91	173,789
2016	609,524	1,435.48	237,479	1,079.39	178,569
2017	619,643	1,528.78	248,751	1,127.96	183,532
2018	629,762	1,628.16	260,629	1,178.72	188,685
2019	639,881	1,733.99	273,145	1,231.76	194,032
2020	650,000	1,846.69	286,336	1,287.19	199,582
Accumulative GDP Growth (compare with 2000)		352%	242%	241%	165%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 650,000, annual real growth rate of GDP 4.5% and annual GDP deflator growth rate +2%.

Exhibit 3.2 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	447,619	531.47	120,090	541.38	122,330
2001	457,738	573.99	126,798	573.87	126,772
2002	467,857	619.90	133,947	608.30	131,440
2003	477,976	669.50	141,568	644.80	136,345
2004	488,095	723.06	149,690	683.49	141,498
2005	498,214	780.90	158,348	724.49	146,910
2006	508,333	843.37	167,577	767.96	152,594
2007	518,452	910.84	177,416	814.04	158,561
2008	528,571	983.71	187,906	862.88	164,826
2009	538,690	1,062.41	199,090	914.66	171,403
2010	548,810	1,147.40	211,016	969.54	178,306
2011	558,929	1,239.19	223,734	1,027.71	185,551
2012	569,048	1,338.33	237,297	1,089.37	193,155
2013	579,167	1,445.39	251,764	1,154.73	201,136
2014	589,286	1,561.02	267,195	1,224.02	209,511
2015	599,405	1,685.91	283,658	1,297.46	218,301
2016	609,524	1,820.78	301,222	1,375.31	227,525
2017	619,643	1,966.44	319,963	1,457.83	237,205
2018	629,762	2,123.76	339,963	1,545.29	247,365
2019	639,881	2,293.66	361,307	1,638.01	258,027
2020	650,000	2,477.15	384,090	1,736.29	269,218
Accumulative GDP Growth (compare with 2000)		666%	330%	321%	220%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 650,000, annual real growth rate of GDP 6.0% and annual GDP deflator growth rate +2%.

Exhibit 3.3 Forecast of Macau's GDP Growth (2000 - 2020)

Year	Population	GDP (at market prices)		GDP (at constant prices)	
		Total (MOP 100 Millions)	Per Capita (MOP)	Total (MOP 100 Millions)	Per Capita (MOP)
2000	447,619	538.85	121,758	549.05	124,061
2001	457,738	590.04	130,344	590.22	130,385
2002	467,857	646.09	139,606	634.49	137,099
2003	477,976	707.47	149,598	682.08	144,228
2004	488,095	774.68	160,378	733.23	151,797
2005	498,214	848.28	172,010	788.23	159,833
2006	508,333	928.86	184,564	847.34	168,366
2007	518,452	1,017.11	198,115	910.89	177,426
2008	528,571	1,113.73	212,742	979.21	187,046
2009	538,690	1,219.54	228,535	1,052.65	197,262
2010	548,810	1,335.39	245,589	1,131.60	208,110
2011	558,929	1,462.25	264,007	1,216.47	219,631
2012	569,048	1,601.17	283,901	1,307.71	231,868
2013	579,167	1,753.28	305,392	1,405.78	244,864
2014	589,286	1,919.84	328,613	1,511.22	258,670
2015	599,405	2,102.23	353,704	1,624.56	273,336
2016	609,524	2,301.94	380,823	1,746.40	288,917
2017	619,643	2,520.62	410,135	1,877.38	305,472
2018	629,762	2,760.08	441,823	2,018.18	323,063
2019	639,881	3,022.29	476,085	2,169.55	341,757
2020	650,000	3,309.40	513,133	2,332.26	361,625
Accumulative GDP Growth (compare with 2000)		614%	421%	425%	291%

Notes:

1. GDP of 1999 is used as the base figure, representing MOP 51.074 billion at constant (1996) prices and MOP 49.21 billion at market prices. The population of 1999 is 437,500.
2. Assume the population by 2020 as 650,000, annual real growth rate of GDP 7.5% and annual GDP deflator growth rate +2%.

Exhibit 4.1 Correlation between Population and GDP Growth

Population	Annual GDP Growth Rate	GDP Growth (at current prices)	GDP Growth (at constant prices)	Remark
550,000	4.5%	283%	192%	best possible growth
	6.0%	375%	258%	
	7.5%	494%	342%	
600,000	4.5%	260%	179%	
	6.0%	345%	237%	
	7.5%	455%	315%	
650,000	4.5%	242%	165%	worst possible growth
	6.0%	330%	220%	
	7.5%	421%	291%	

Note: Assume quality of people remains constant

Exhibit 4.2 Correlation between Population and GDP Growth

Annual GDP Growth Rate	Population	GDP Growth (at current prices)	GDP Growth (at constant prices)	Remark
4.5%	550,000	283%	192%	worst possible growth
	600,000	260%	179%	
	650,000	242%	165%	
6.0%	550,000	375%	258%	
	600,000	345%	237%	
	650,000	330%	220%	
7.5%	550,000	494%	342%	best possible growth
	600,000	455%	315%	
	650,000	421%	291%	

Note: Assume quality of people remains constant

Exhibit 5 Economic Forecast of Major Countries in the World (1998 - 2010)

country	1998		2010		Accumulative Growth(%)	Variation in Weighting (%)
	GDP (US\$ 100 millions)	Weighting in the world(%)	GDP (US\$ 100 millions)	Weighting in the world(%)		
USA	82,304	28.60	113,310	24.60	37.67	-4.00
European Union	83,369	29.00	114,776	24.90	37.67	-4.10
Japan	37,830	13.20	47,414	8.20	25.33	-5.00
China	9,590	3.33	21,600	4.70	219.08	+1.37
Russia	2,766	0.96	3,944	0.86	87.56	-0.10
Other Regions	71,770	24.91	168,491	36.74	134.76	+11.83

Source of Data: The World Bank; figures reorganized based on the article released by the New China News Agency (Fujian Daily, 5 September 2000).

Appendix: Institutions and organizations consulted for this research report

(in alphabetical order)

Associação Comercial dos Conterraneos de Fukien Macau
Associação das Senhoras Democráticas de Macau
Associação de Educação de Macau
Associação de Pequenas e Médias Empresas de Macau
Associação dos Exportadores e Importadores de Macau
Associação dos Fretadores de Macau
Associação dos Industriais de Tecelagem e Fiação de Lã de Macau
Associação Geral dos Operários de Macau
Associação Industrial de Macau
Associação Promotora das Ciências e Tecnologias de Macau
Associação Promotora do Desenvolvimento de Macau
Association of Macao Tourist Agents
Association of Property Agents and Realty Developers of Macau
Association of Real Estate Sector of Macao
E-Commerce Association of Macau
Macao Association of Building Contractors and Developers
Macao Entertainment & Service Association
Macao Hotel Association
Macao Junior Chamber
Macao Management Association
Macao MBA Association
Macao Productivity and Technology Transfer Center
Macao Society of Accountants
Macao Society of Social Sciences
Macao Travel Agency Association
Macao Association of Retailers & Tourism Services
Macao Computer Association
Macao Construction Association
Oversea Chinese Association Macau
The Japan Alumni Society of Macao
The Macao Chamber of Commerce
The Macao Association of Banks
The Macao Chinese Enterprises Association
The Macao Financial Markets Association
The Macao Institution of Engineers
União Geral das Associações dos Moradores de Macau
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Lam Heong Sang	Wong Seng Son
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澳門 2020

——未來 20 年遠景目標與發展策略

MACAU 2020

——THE LONG TERM OBJECTIVES AND DEVELOPMENT STRATEGIES IN 20 YEARS

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