



澳門研究簡報

Macao Studies Bulletin

創刊號 | ISSUE 1

07 · 2020



發刊詞 Editor's Note

為了更及時地向社會各界提供澳門研究的最新動態，了解各地學者對澳門現狀和未來的研判，澳門大學澳門研究中心決定從 2020 年 7 月起出版季刊《澳門研究簡報》。

澳門大學澳門研究中心自成立伊始，即以「立足澳門，研究社會，為澳門的長期穩定、繁榮、發展服務」為宗旨，在 1988 年 3 月創辦學術期刊《澳門研究》，其後與澳門基金會攜手合作編輯出版，一直推動以澳門為主體的跨學科研究。鑑於近年國際及鄰近地區對澳門的注視，澳門在「粵港澳大灣區」以及「一帶一路」等區域發展國策上的作用，關於澳門的跨學科跨地域研究正在日益增加，作為澳門的社會智庫之一，澳門大學澳門研究中心決定出版通訊類刊物——《澳門研究簡報》，及時提供本澳以及各地出版的關於澳門的研究成果簡介，以推廣各方學者的智慧結晶，為學界和社會搭建溝通橋樑，為澳門社會發展貢獻學術的力量。

《澳門研究簡報》將會以中英文雙語每季出版，內容包括關於澳門的最新國際、區域以及本土學術成果的報道，同時將會刊出學者對澳門公共政策和社會發展的各種建言，歡迎公眾以電郵方式訂閱。

In order to provide timely updates on Macao studies, and to understand the insightful opinions of scholars from everywhere regarding current status and future judgment of Macao, the Centre for Macau Studies of the University of Macau has decided to publish *Macao Studies Bulletin* starting from July 2020. The core mission of the Centre is “to pursue research on Macau society from the standpoint of Macau itself, for serving the long-term stability, prosperity and development of Macau”. The newly published *Macao Studies Bulletin* may provide a sound platform to share the outcome of wisdom generated from all fields of scholars and experts related to Macao or Macao studies, and to contribute to the local society with the academic achievement.

Macao Studies Bulletin will be issued on a quarterly basis in both Chinese and English. The content will include reports on the latest academic achievements locally and globally. In addition, *Macao Studies Bulletin* will share various suggestions provided by scholars on Macao's public policies and social development. It can be conveniently subscribed by email, or viewed at the website of the Centre for Macau Studies.

Please keep your eyes on this upcoming *Macao Studies Bulletin*.

Thank you!

本期頭條 HOT NEWS

2020年
澳門最新宏觀經濟預測
The Latest
Macroeconomic
Forecast for
Macao 2020

P.2



2020 年澳門最新宏觀經濟預測

The Latest Macroeconomic Forecast for Macao 2020



因應新型冠狀病毒感染急速廣泛傳播並導致大範圍社會和經濟影響，澳門大學澳門研究中心及經濟學系組成的《澳門宏觀經濟模型課題組》在一月發佈的 2020 年澳門經濟增長的基礎上調整預測，並在二月及四月進行兩次初步調整，是次更新有兩大預設。第一：旅客數目與博彩收入比以往更加影響澳門經濟的增長；由於疫情轉變快速且影響面廣，其他地區增長因素相對變得不太重要；防控疫情措施常態化；疫情在非洲並沒有嚴重如其他地區大面積擴散；中國內地經濟增長不高於 2%；香港經濟持續收縮。第二：將預測分成五個不同以旅客數目為主的情景。每個情景預測全年旅客數目分別是：

In response to the worldwide effects of the COVID-19 pandemic, the University of Macau's (UM) Centre for Macau Studies (CMS) and the Department of Economic have announced the revised 2020 Macao Macroeconomic Forecast using the Macroeconometric Structural Model of Macao. The forecast has been revised twice, in February and April respectively, since its first announcement in January this year. The revisions were based on the following assumptions. First, compared to the pre-pandemic period, the total number of visitor-arrivals and the gross gaming revenue now play a more important role in Macao's economic growth. Owing to the worldwide effects of COVID-19, the growth factors of other regions are relatively not significant. Epidemic prevention and control tends to move towards normalisation. It appears that the coronavirus has not spread so widely in Africa as in the rest of the world. China's economic growth is expected to be less than 2 per cent. Hong Kong's economy is expected to see steady deterioration. Second, the forecast is divided into five scenarios with different numbers of total visitor arrivals, which are:

- 情景一：5.16 百萬人次；
- 情景二：7.92 百萬人次；
- 情景三：10.68 百萬人次；
- 情景四：9.90 百萬人次；
- 情景五：12.66 百萬人次。

- Scenario 1: 5.16 million visitor arrivals;
- Scenario 2: 7.92 million visitor arrivals;
- Scenario 3: 10.68 million visitor arrivals;
- Scenario 4: 9.9 million visitor arrivals;
- Scenario 5: 12.66 million visitor arrivals.



2020 年澳門最新宏觀經濟預測發佈（左起：澳大經濟系何偉雄副教授、澳門研究中心主任林玉鳳副教授、澳大經濟系關鋒助理教授）The Releasing of latest 2020 macroeconomic forecast for Macao (From left to right: Prof. Ho Wai Hong, Department of Economics of UM, Prof. Agnes Lam, Director of CMS, Dr. Kwan Fung, Department of Economics of UM)

綜合分析後，研究團隊認為按上述的預設，澳門 2020 年的經濟出現情景一與情景二或其混合的機會比較大，情景三至五會在如果今年下半年經濟反彈下出現。若經濟發展按情景一和二的預測，澳門實質本地生產總值有可能回復到大概 2004 年的水平；若經濟發展按情景三至五的預測，澳門實質本地生產總值有可能回復大概到 2005 年的水平。

After a comprehensive analysis and on the basis of the above assumptions, the research team believes that the first, the second, or a mix of the two scenarios, is likely to materialise for Macao in 2020. If Macao's economy rebounds in the second half of this year, the third, fourth, and fifth scenarios are expected to materialise. If the forecast is based on the first and second scenarios, Macao's real GDP growth rate may be roughly the same as that of 2004. If the forecast is based on the third to fifth scenarios, Macao's real GDP growth rate may be the same as that of 2005.



基於以上五個情景，更新的經濟預測如下：

- 最新經濟增長的基線預測分別是 -59.1%、-58.4%、-57.7%、-55.8%、-55.7%，而高低波幅會在 -54.5% 和 -60.0% 之間。
- 最新服務業出口增長按以上五個情景的基線預測分別是 -81.0%、-78.8%、-77.0%、-74.3%、-72.6%。
- 最新私人消費增長按以上五個情景的預測下跌約 8%。
- 最新預測固定資產形成增長按以上五個情景的預測大幅收縮至 33% 左右，如政府加快公共投資有望，收窄投資的下跌。
- 最新和初始預測物價變動（本地生產總值平減指數和消費物價指數）按以上五個情景的預測維持在 2.1% 至 2.2%，變動輕微。
- 最新預測每月工作收入下跌 5.8% 至 6.7% 之間，惟最高和最低的預測差異比較大，達 6.8 個百分點。
- 最新和初始預測的失業率按以上五個情景預測在 2.2% 至 2.8% 之間，輕微上升。而本地居民失業率則有略明顯的升幅，在 3.9% 和 3.2% 之間。
- 預計本年度澳門特區政府最終收入將大幅縮減到在 713 億澳門元至 929 億澳門元左右。

Based on the above five scenarios, the revised forecasts of major economic variables are as follows:

- The baseline forecast of Macao's economic growth are -59.1%, -58.4%, -57.7%, -55.8% and -55.7% respectively. The highest and the lowest values range between -54.5% and -60.0%.
- The baseline forecast of the exports of services adjusted down by -81.0%, -78.8%, -77.0%, -74.3% and -72.6%.
- Private gross fixed capital formation adjusted down by around 8%.
- Total gross fixed capital formation adjusted down by 33%. If government gross fixed capital formation recovers and increases substantially, the decline will significantly slow down.
- Inflation adjusted up by 2.1% to 2.2%, in tandem with consumer price, which is a modest change compared with the initial forecast made in January.
- Median monthly employment earnings adjusted down by 5.8% to 6.7%, among which the difference between the highest and the lowest rate is projected to be 6.8%.
- Unemployment rate is projected to be between 2.2% to 2.8%, which is a moderate increase. Excluding non-resident workers, the unemployment rate for residents is expected to be 3.2% to 3.9%.

The ultimate government revenue is expected to drop to between MOP 71.3 billion and MOP 92.9 billion.



基於以上更新預測可知，疫情主要影響經濟增長，而就業和物價兩大宏觀變數基本變動相對不算太大，這是澳門與其他經濟體不同之處：疫情是一個短期的經濟震盪，但由於它在 2020 年已經延續兩個季度，因此對全年的增長有相當的負面影響。另外，與 2003 年非典不同，當時疫情過後有「自由行」支持澳門經濟復甦，現今訪澳旅客基數變大，經濟復甦效應可能遠不及當年。2020 年還有中美經貿摩擦和內地經濟進一步增長放緩的不利因素，澳門經濟的情況未許樂觀。充裕的財政盈餘、尚好的營商環境、相對合理的物價水平與就業狀況還是澳門經濟復甦的有利因素。為此，今年的宏觀經濟政策與目標應以短期穩定勞動力市場為主（避免過多企業停業和倒閉、維持生產者與消費者信心），繼而推動短期經濟恢復，避免深度下跌為主。必須指出，以上五個情景的假設和相關分析，還需要進行更仔細深入研究，以加強預測準確性與政策建議可靠性。如果環球疫情發生根本性變化，我們需要再次調整預測。

As mentioned above, the coronavirus outbreak mainly affects Macao's economic growth, with less impact on the two major economic variables: unemployment rate and inflation rate. This is how Macao's economy is affected differently by the pandemic compared to other economies. The epidemic is a short-term shock to Macao's economy. However, as it has already impacted Macao's economy in the first and second quarters of this year, there will be a negative impact on the annual economic growth rate. Following the SARS epidemic in 2003, the Individual Visit Scheme was launched to boost Macao's economy. But similar schemes will have less effect on economic recovery following the COVID-19 as the base number of visitors has increased. Furthermore, with the economic tension between China and the United States, and the slowdown in China's economic growth, Macao's economy is expected to deteriorate in 2020. The positive factors of Macao's economic recovery include the city's fiscal surpluses, business environment, and comparatively reasonable consumer prices and employment rate.

Therefore, the macroeconomic policy and objectives should aim to stabilise the labour market in the short run, prevent the closedown of businesses, and maintain the confidence of producers and consumers, in order to promote a gradual economic recovery. It must be pointed out that, the five scenarios mentioned above and the relevant analysis do require an in-depth study to ensure the accuracy of the forecast and the effectiveness of the policies formulated based on the forecast. If the coronavirus pandemic demonstrates a fundamental change, it is necessary to revise the forecast again.



《澳門宏觀經濟模型》簡介

About the Macroeconometric Structural Model of Macao

《澳門宏觀經濟模型》是一個大型季度聯立方程計量模型，目前包含澳門經濟中七個主要部分——消費、投資、對外貿易、價格、政府部門、就業市場以及金融系統，共有 251 個變數和 89 條方程式，所用數據由 1998 年第 1 季開始，模型估算會隨着數據發表而定時更新，提供及時和有用的澳門經濟分析，協助決策者對未來作出合理的規劃。此模型由澳門大學榮譽博士、諾貝爾經濟學獎得主詹姆士·莫里斯教授和經濟學系老師開發與管理，課題組成員包括陳志誠、何偉雄、廖振華和關鋒，項目現由澳門大學澳門研究中心負責。

The Macroeconometric Structural Model of Macao is a quarterly simultaneous-equations econometric model which covers seven blocks of Macao's economy: consumption, investment, external sector, prices, government, labour market, and monetary sector. It includes 89 equations and 251 variables. Time series data start from the first quarter of 1998 and is updated once new data are available. Its results provide the community with a timely understanding of the state of Macao's economy and support prudent decision-making. The model was founded by Prof. Sir James Mirrlees, winner of the Nobel Prize in Economic Sciences and honorary doctor of social sciences of the UM, as well as faculty members in the Department of Economics. Project members include Dr. Chan Chi Shing, Postdoctoral Research Fellow in the CMS; Prof. Ho Wai Hong, Associate Professor in the Department of Economics; Dr. Kwan Fung, Assistant Professor in the Department of Economics; and Dr. Liu Chun Wah, Assistant Professor in the Department of Economics.



表 1：主要經濟指標預測（2020）

Table 1 : Forecasts of Major Economic Variables in 2020

| 與去年同期比較變動率 (%) (2018=100) Year-on-Year Growth Rate (%) | | 情景一 Scenario 1 | 情景二 Scenario 2 | 情景三 Scenario 3 | 情景四 Scenario 4 | 情景五 Scenario 5 |
|---|-------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| 本地生產總值 Gross Domestic Product | 最低 Lower | -60.0 | -59.5 | -58.8 | -56.9 | -56.9 |
| | 基線 Baseline | -59.1 | -58.4 | -57.7 | -55.8 | -55.7 |
| | 最高 Upper | -58.1 | -57.4 | -56.6 | -54.6 | -54.5 |
| 私人消費支出 Private Consumption Expenditure | 最低 Lower | -10.9 | -10.9 | -10.8 | -10.8 | -10.7 |
| | 基線 Baseline | -8.7 | -8.7 | -8.6 | -8.6 | -8.6 |
| | 最高 Upper | -6.5 | -6.5 | -6.4 | -6.3 | -6.3 |
| 固定資本形成總額 Gross Fixed Capital Formation | 最低 Lower | -40.5 | -40.5 | -40.4 | -40.4 | -40.4 |
| | 基線 Baseline | -36.1 | -36.0 | -36.0 | -36.0 | -36.0 |
| | 最高 Upper | -31.6 | -31.5 | -31.5 | -31.5 | -31.5 |
| 貨物出口 Exports of Goods | 最低 Lower | -61.7 | -61.1 | -61.1 | -61.0 | -61.0 |
| | 基線 Baseline | -58.3 | -58.3 | -58.3 | -58.3 | -58.3 |
| | 最高 Upper | -55.6 | -55.6 | -55.6 | -55.6 | -55.6 |
| 服務出口 Exports of Services | 最低 Lower | -81.6 | -79.6 | -77.9 | -75.4 | -73.8 |
| | 基線 Baseline | -81.0 | -78.8 | -77.0 | -74.3 | -72.6 |
| | 最高 Upper | -80.3 | -78.1 | -76.2 | -73.2 | -71.5 |
| 貨物進口 Imports of Goods | 最低 Lower | -46.5 | -43.2 | -40.9 | -40.0 | -35.8 |
| | 基線 Baseline | -44.0 | -40.2 | -37.5 | -36.7 | -32.0 |
| | 最高 Upper | -41.5 | -37.2 | -34.2 | -33.3 | -28.2 |
| 服務進口 Imports of Services | 最低 Lower | -42.8 | -41.8 | -41.1 | -40.2 | -39.6 |
| | 基線 Baseline | -40.6 | -39.4 | -38.8 | -37.7 | -37.0 |
| | 最高 Upper | -38.4 | -37.1 | -36.5 | -35.1 | -34.4 |
| 本地生產總值之平減物價指數增長率 GDP Deflator Growth Rate | 最低 Lower | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 |
| | 基線 Baseline | 2.1 | 2.2 | 2.2 | 2.2 | 2.2 |
| | 最高 Upper | 3.6 | 3.8 | 3.8 | 3.8 | 4.0 |
| 消費者物價指數（綜合）通脹率 CPI (Composite) Inflation Rate | 最低 Lower | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 |
| | 基線 Baseline | 2.2 | 2.2 | 2.2 | 2.2 | 2.2 |
| | 最高 Upper | 2.8 | 2.8 | 2.8 | 2.8 | 2.8 |
| 每月工作收入中位數 Median Monthly Employment Earnings | 最低 Lower | -9.6 | -9.4 | -9.1 | -8.9 | -8.8 |
| | 基線 Baseline | -6.7 | -6.4 | -6.1 | -5.9 | -5.8 |
| | 最高 Upper | -3.7 | -3.5 | -3.1 | -2.8 | -2.7 |
| 失業率 Unemployment Rate | 最低 Lower | 2.6 | 2.4 | 2.2 | 2.1 | 2.0 |
| | 基線 Baseline | 2.8 | 2.7 | 2.4 | 2.4 | 2.2 |
| | 最高 Upper | 3.0 | 2.9 | 2.6 | 2.6 | 2.5 |
| 本地居民失業率 Unemployment Rate (Residents) | 最低 Lower | 3.6 | 3.4 | 3.1 | 3.0 | 2.9 |
| | 基線 Baseline | 3.9 | 3.8 | 3.4 | 3.3 | 3.2 |
| | 最高 Upper | 4.3 | 4.1 | 3.7 | 3.7 | 3.5 |
| 政府總收入（億澳門元） Government Revenue (Billion MOP) | 最低 Lower | 652 | 709 | 749 | 810 | 849 |
| | 基線 Baseline | 713 | 778 | 820 | 889 | 929 |
| | 最高 Upper | 775 | 847 | 892 | 968 | 1,010 |

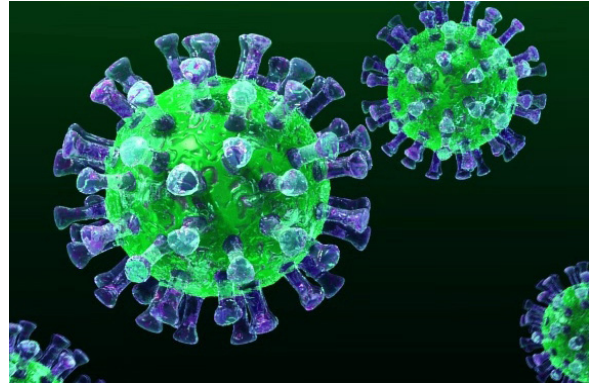
綜合預測除政府總收入為名義值外，其他是實質變化值（2018=100）。

Apart from the total government revenue which happens to be the nominal value, the abovementioned comprehensive forecast is the real change value (2018=100).

國際合作：新冠肺炎大流行的社會心理影響研究 International Collaboration : Study on the Psychosocial Effects of the COVID-19

澳門大學澳門研究中心參與了一個全球 16 所大學共同進行的新冠肺炎 (COVID-19) 疫情對心理健康影響的研究，研究由荷蘭阿姆斯特丹自由大學 (Vrije Universiteit) 的世界衛生組織合作中心支持，並由該大學領導，計劃在一年的過程中進行，對新冠肺炎 (COVID-19) 大流行的引致的長期心理健康影響，進行跨地域研究。

是次研究項目將於 16 個國家進行，研究團隊由來自全球 16 個國際機構的專家學者團隊組成，其中包括澳門大學 (University of Macau)、倫敦衛生與熱帶醫學院 (London School of Hygiene & Tropical Medicine)、瑞典卡羅林斯卡學院 (Karolinska Institutet)、德國柏林自由大學 (Freie Universität Berlin)、南非斯泰倫博斯大學 (Stellenbosch University)、意大利維羅納大學 (The Università di Verona)、美國耶魯大學 (Yale University) 等等。澳門研究中心參與了調查的設計，同時協調澳門及周邊地區的數據收集工作。



研究會以縱向型式進行追蹤研究，計劃在一年的過程中，透過 16 所大學的合作，評估全球新冠肺炎 (COVID-19) 大流行的長期心理健康影響，藉此提供關鍵的政策指導，以加強全球現有的衛生服務，以及更好的解決公共精神衛生問題，加深人類應對新冠肺炎 (COVID-19) 全球大流行引起的壓力和破壞的集體知識，以在逆境中保持彈性。

The Centre for Macau Studies of the University of Macau participated in a study on the impact of the novel coronary pneumonia (COVID-19) epidemic on mental health conducted by 16 universities around the world. The research was supported by the World Health Organization Collaboration Center of Vrije Universiteit in Amsterdam, the Netherlands. The University plans to conduct it over the course of a year for cross-regional studies on the long-term mental health effects caused by the novel coronary pneumonia (COVID-19).

The study will be conducted in 16 countries, representing all regions of the globe, with 16 global university partners, including the University of Macau, London School of Hygiene & Tropical Medicine, Karolinska Institutet, Freie Universität Berlin, Stellenbosch University, the Università di Verona, and Yale University, etc. The Centre for Macau Studies has been involved in the design of the survey and will coordinate the data collection works and related processes in Macao and the regions around.

This study will be conducted in a longitudinal way over the course of one year and will enable the scientific consortium to investigate the long-term mental health effects of the COVID-19 pandemic worldwide. The aim of the research is to provide key policy guidance to strengthen existing health services to better address public mental health, and deepen our collective knowledge on how populations respond to adversity and remain resilient despite exposure to stress and disruption caused by the COVID-19 pandemic.

是次研究以電子問卷調查方式進行，公眾可以登入以下連結參與入調查，合資格的參與者可以參加抽獎遊戲。

連結：<https://vrijeuniversiteit.datacoll.nl/iultevzdjl?l=zh-hant>

Anyone interested can click the following link to join the survey and participate in a lucky draw at the end of the study. LINK - <https://vrijeuniversiteit.datacoll.nl/iultevzdjl?l=zh-hant>

區域合作：澳大與南方新聞網建經濟社會數據研究聯合實驗室 Regional Collaboration: University of Macau and Nanfang Daily Media Group (Southcn.com) Establish Joint Laboratory of Economic and Social Data Research

澳門大學澳門研究中心於 6 月 24 日與南方新聞網舉行《共建粵港澳大灣區（澳門）經濟與社會數據研究聯合實驗室暨簽署戰略合作框架協議》儀式，澳門研究中心主任林玉鳳代表澳門大學參與了雲端戰略合作框架協議簽署儀式，標誌着粵澳雙方相互合作的進一步落實和加深。澳門研究中心圍繞澳門在粵港澳大灣區建設過程中的定位，已開展了系列調研。研究團隊從區域經濟學、政治經濟學的角度出發，將理論研究和民意調查相結合，獲取和累積了大量一手資料，助力澳門根據自身的定位，更好地參與到粵港澳大灣區的發展藍圖及工作計劃中。

Centre for Macau Studies (CMS) of The University of Macau (UM) and Nanfang Daily Media Group (Southcn.com) held a ceremony for the signing of a strategic cooperation framework agreement on the establishment of a joint laboratory of economic and social data research in the Guangdong-Hong Kong-Macao Greater Bay Area (Greater Bay Area) on 24 June. Prof. Agnes Lam, Director of CMS, representing UM, joined the online ceremony and signed the agreement. This agreement represents yet another concrete implementation of deep collaboration between Guangdong and Macao guided by the spirit of an earlier government document Outline of the Strategies for the Development of the Greater Bay Area. CMS has carried out a series of investigations around the positioning of Macao in developing the Greater Bay Area. From the perspective of regional economics and political economics, CMS research team combined theoretical research and opinion polls to obtain and accumulate a large amount of first-hand information to help Macao better participate in the development of the Greater Bay Area.

一直以來，為配合澳門經濟社會發展的需要，澳門研究中心積極推進以加速澳門發展為主題的各種學術活動及專題調研。而南方新聞網是廣東綜合新聞門戶網站，與南方日報、南方雜誌、南方 + 用戶端共同構成廣東「一報一刊一網一端」的規模格局。雙方一致認為，南方新聞網作為廣東省具有廣泛影響力的新型主流媒體，資源優勢明顯；澳大作為澳門科研人才和科研成果的聚集高地，配合國際化背景底蘊，發展潛力巨大。雙方在服務粵港澳大灣區發展中各自具有獨特的地位和作用。為抓住粵港澳大灣區重要戰略機遇，促進粵澳兩地資訊資源跨境流動和區域融通，雙方決定按照「優勢互補、共謀發展」的原則，共同建立「南方新聞網與澳門大學粵港澳大灣區（澳門）經濟與社會資料研究聯合實驗室」，具體的合作內容包括共建粵港澳合作專題資料庫、開展粵港澳合作重大課題研究、推動粵港澳大灣區宣傳推介，以及共同建立資料新聞教學實習基地等不同領域，發展戰略級合作夥伴關係。

To meet the needs of Macao's economic and social development, CMS has actively promoted various academic activities and special research on the theme of accelerating the development of Macao. It is known that Nanfang Daily Media Group (Southcn.com) serves as the most influential mainstream media organisation in Guangdong province. Together with Nanfang Daily, Nanfang Magazine, and Nanfang+Client, it constitutes the scale pattern of "one newspaper, one journal, one network and one end" in Guangdong. Obviously, Nanfang Daily (Southcn.com) has solid resource-wise advantages, while the UM is a public university in this region with solid background of internationalization and research outcomes. It shows great potentiality for development. Both parties have unique positions and roles in promoting the development of the Greater Bay Area. In order to seize the strategic opportunities in the area and to promote cross-border flow of information resources and regional integration, the two parties have decided to jointly establish a joint laboratory of economic and social data research. In addition to establish the joint laboratory, both parties will also, among other things, jointly establish a database on Guangdong-Hong Kong-Macao cooperation, carry out research projects on related issues, promote public awareness about the Greater Bay Area, and establish an internship base for journalism education.



本土合作：搭建學術與社會服務的合作之橋 Local Collaboration : Promotion of Academic and Social Services

為提升社會服務的水平，進一步推動學術與社會服務方面的合作，澳大澳門研究中心主任林玉鳳與澳門明愛總幹事潘志明於5月28日代表雙方簽署備忘錄。明愛服務總監袁志海、副服務總監林玉珠、澳大澳門研究中心客席副教授賀佰恩亦有出席。

過去數年，澳大澳門研究中心與澳門明愛在學術研究、專題研討等多方面都建立了良好的合作基礎，共同開展了多項專題研究，包括已完成的澳門食物銀行使用者狀況研究第一階段研究，現時正開展第二階段深化研究。另外，澳大澳門研究中心亦與澳門明愛和世界衛生組織開展一項關於外地僱員精神健康的研究。在雙方的合作過程中，澳大澳門研究中心就理論研討、調查方法、學術資源等提供學術支撐，而澳門明愛則在前線服務、社區支援、資源整合等作出動員和落實。

經過多年的合作，雙方都認為在現今數據化及社會服務專業化的時代，社會服務不能再停留在過去的經驗之談，而應該透過更理論化和科學化的方式開展服務，以理論研究和社會調查等為基礎，收集、分析服務對象的資料，以找到最有效的服務方法，從而大大提升社會服務的水平。

The Centre for Macau Studies (CMS) of the University of Macau (UM) signed a memorandum of understanding (MOU) with Caritas Macau on 28 May, in order to improve the quality of social services and enhance collaboration between academia and social service organisations. Prof. Agnes Lam, Director of the CMS, and Mr. Pun Chi Meng, Director-general of Caritas Macau, signed the MOU on behalf of their respective institutions. Two other representatives from Caritas Macau, as well as Prof. Brian Hall, Adjunct Associate Professor in the CMS, also attended the ceremony.

In the past few years, CMS and Caritas Macau have laid the groundwork for future collaborations in various aspects, such as academic research and seminars. They have jointly carried out a number of research studies, including a study on the current situation of people supported by the Short-term Food Assistance Programme. The first phase of the study has been completed and the second phase is currently underway. In addition, the CMS and Caritas Macau are also jointly studying the mental health of non-local workers in Macao, in collaboration with the World Health Organization. During the collaboration, process the CMS provides academic support for theoretical discussions, survey methods, and academic resources, while Caritas Macau coordinates the efforts of workers responsible for providing frontline services, community support, and resource integration.

Having worked together for many years, both parties believe that social services must keep pace with the demand for digitalisation and professionalisation in the current era. Social institutions should provide services based on scientific evidence and the results of theoretical research. Through conducting various surveys in the community, the CMS and Caritas Macau have been collecting and analysing data on their service targets in order to find the most effective way to provide high-quality social services.



澳門研究中心與澳門明愛簽署合作備忘錄（左起：潘志明總幹事、林玉鳳主任）
CMS signed a MOU with Caritas Macau (From left to right: Mr. Pun Chi Meng, Director-general of Caritas Macau, Prof. Agnes Lam, Director of CMS)

心繫社會：對 2020 年特區施政的建議 Hosting Online Seminar on Macao SAR Government's Policy Address 2020

澳門大學澳門研究中心於 2020 年 4 月 22 日舉行「2020 澳門特區《施政報告》」座談會，討論第五屆特區政府的首份《施政報告》。與過往一樣，澳門研究中心均會在行政長官發表年度《施政報告》後，組織專家學者討論和分析報告，以期提出針對性的意見予特區政府參考。受疫情影響，今年首次採用了線上討論形式進行。

是次會議的參加者有：澳門大學副校長（研究）葛偉、社會科學學院院長胡偉星、工商管理學院大西洋銀行講座教授蘇育洲、中國歷史文化中心主任朱壽桐、博彩研究所所長馮家超、法學院教授駱偉建、科技學院副教授黃承發、社會科學學院副教授余永逸、社會科學學院助理教授關鋒、社會科學學院助理教授陳建新、澳門政治經濟研究協會理事長唐繼宗，會議由澳門研究中心主任林玉鳳主持。

會上學者均積極發言，他們對《施政報告》均持正面態度，認為是次《施政報告》首重應對疫情、穩定就業，而在未來政策上則既大膽進取，又實事求是。

The Centre for Macau Studies (CMS) of the University of Macau (UM) held an online seminar on the Macao SAR Government's policy address for the Year 2020 on 22 April, which is the first policy address of the fifth leadership of the Macao SAR Government by Chief Executive Ho Iat Seng. As per its usual practice, after the Chief Executive presented the annual policy address, CMS will arrange experts and scholars to discuss and analyze the policy's content, to provide insightful opinions and professional advice to the government for reference. Because of the epidemic, this year's seminar was held online for the first time in the university's history.

The forum was chaired by Prof. Agnes Lam, Director of CMS. The guest speakers participating in the forum included Prof. Wei Ge, Vice Rector (Research) of UM; Prof. Weixing Hu, Dean of the Faculty of Social Sciences; Prof. Jacky So, the BNU Chair Professor of Faculty of Business Administration; Prof. Shoutong Zhu, Interim Director of the Centre for Chinese History and Culture; Prof. Davis Fong, Director of the Institute for the Study of Commercial Gaming; Prof. Wai Kin Lok, Professor of Faculty of Law; Prof. Alfred Wong, Associate Professor of the Faculty of Science and Technology; Prof. Eilo Yu, Associate Professor of the Faculty of Social Sciences; Dr. Fung Kwan, Assistant Professor of the Faculty of Social Sciences; Dr. Kin Sun Chan, Assistant Professor of the Faculty of Social Sciences; and Dr. Samuel Tong, the President of the Macao Political Economy Research Association.

During the seminar, participants reacted positively to this year's policy address, which they believe it largely focuses on responding to the epidemic and stabilizing the economy while being proactive and realistic for the city's future development.

澳大全力配合特區施政

UM fully cooperates with Macao SAR governance

澳大副校長葛偉認同，高等教育需研產業化發展，包括引進人才、擴招非本地生等，對提升整體高教質量有着重大的意義。此外，把高教局及教育局合併在一起，也均有利特區高等教育事業的發展。

According to Prof. Wei Ge, Vice Rector (Research) of UM, sustainable development of higher education calls for industrialization, which involves the recruitment of top-tier scholars globally and more non-local students. This is of great significance to enhance the overall quality of higher education in Macao. He also points out that the merger of the Higher Education Bureau and the Education and Youth Affairs Bureau is conducive to higher education development in the Macao SAR.

此外，是次《施政報告》還在智慧城市、數字政府、水域管理與公務員培訓有所著墨，而澳門大學在這些方面均設有相應的國家重點實驗室、研究中心等，澳大將全力配合特區施政，發揮其公立大學的貢獻社會的使命。

In addition, it is noted that this year's policy address also touches on smart city development, digital government, water management, and civil servant training. UM has set up relevant state key laboratories and research centres in these areas and will fully cooperate with the SAR government and assume its responsibility as a public university to contribute to this region or beyond.



行政改革重在權責和溝通

Administrative reformation focuses on accountability and communication

在公共行政方面，社會科學學院院長胡偉星認為，是次《施政報告》有推動改革的思維，觸及一些澳門的深層次問題，在公共行政、法律改革、經濟多元、社會結構、區域合作等方面均有亮點。然而，如要進一步落實改革，必須要釐清當中的權責關係。社會科學學院副教授余永逸認為，是次《施政報告》一改過往「派糖」模式，回歸「理性」討論，但公共行政改革仍重彈過往老調，跨部門合作等問題仍考驗政府的管治能力。特區政府一些政策的推出過往都是「提出快，實施慢」，期望有所改善，並應重視與民間的溝通合作。

Regarding public administration, Prof. Weixing Hu, Dean of the Faculty of Social Sciences, says the policy address presents some thoughts on promoting reforms, covers some of the deep-rooted issues in Macao, and highlights public administration, legal reform, economic diversification, social structure, and regional collaboration. However, Prof. Hu believes that to successfully implement these reforms, it is necessary to clarify the relationship between delegation and responsibility. Prof. Eilo Yu, an associate professor in the Faculty of Social Sciences, says that in a refreshing departure from previous focus on “cash handout”, this year's policy address resumes a more “rational” discussion on livelihood issues. However, in terms of public administration reform, it is mostly just a rehash of the old rhetoric, and interdepartmental collaboration will remain as a challenge for the government. Prof. Yu adds that in the past, policies proposed by the government usually took a long time to implement; he hopes the government can make improvements in this area and attach greater importance to communication and collaboration with the people.



博彩專營權和法律改革需有時間表

Timetable required for gaming concession and legal reform

社會科學學院助理教授關鋒認為，澳門經濟適度多元的進程離不開博彩業，是次《施政報告》卻沒有太多著墨。他認為，應在博彩專營權上釋出一些訊息，因為博彩專營權、博彩業、經濟適度多元三者是息息相關的。此外，他亦提到法律改革問題，最好能有一個時間表，說明哪些應該修改？何時改？如何改？這才能更有效率。法學院教授駱偉建認為，是次《施政報告》提出了「一國和兩制」、「澳門和內地發展」、「多元和單一」、「人才和引進」、「經濟和民生」、「改革和穩定」六大關係，這考驗着特區政府的管治能力。在法律改革方面，他認為需要作出詳盡和合理規劃，且法律的完善是離不開經濟和民生的改善的。

Dr. Fung Kwan, an assistant professor in the Faculty of Social Sciences, says that one cannot discuss the issue of economic diversification in Macao without discussing the gaming industry, which is however not given much emphasis in the policy address. Dr. Kwan believes that some information on gaming licenses should be released, because the gaming concession licenses, gaming industry, and economic diversification in Macao are all closely related and affected each other. Dr. Kwan also suggests that the SAR government should prepare a timetable for implementing legal reforms, which should specify which laws should be reviewed and revised, as well as when and how to amend them, in order to increase efficiency.



Prof. Wai Kin Lok, a professor in the Faculty of Law, says that the policy address proposes six sets of conceptual relationships, namely “one country” versus “two systems”, “Macao’s development” versus “Mainland’s development”, “economic diversification” versus “single-pillar economic structure”, “nurturing local talent” versus “attracting non-local talent”, “economic growth” versus “people’s livelihood”, and “reform” versus “stability”. Prof. Lok believes that whether these relationships can be handled properly will become a “test” of the SAR government’s governance capacity. In terms of legal reform, Prof. Lok believes that detailed and reasonable planning is important, and the improvement of laws cannot be achieved without the improvement of the economy and people’s livelihood.

經濟多元關鍵在橫琴

The key to economic diversification lies in Hengqin

博彩研究所所長馮家超教授指出，是次《施政報告》大膽地提出了一些以往敢想不敢做的事情，如延伸自由港政策、橫琴 GDP 澳門組成部分的計算、中醫藥註冊等，這些都有利於澳門的長遠發展，但若要成功實施，國家支持必不可少。工商管理學院教授蘇育洲表示，澳門一業獨大，是缺點也是優點。而橫琴的利用對澳門經濟適度多元十分重要，澳門可在橫琴設立債券、人民幣結算等金融產業，只要定位清晰，金融業將在澳門有很大的發展潛力。然而，他提醒，由於政府現時大力推動消費，熱錢太多可能會引發一些經濟問題。澳門政治經濟研究協會理事長唐繼宗博士認為，自由行政策未必能如預期一樣，在疫情結束後立即起到拉動經濟增長的作用。澳門的主要問題在於經濟規模太小，經濟多元不等於產業多元，經濟多元一定需要區域合作，而最可行的辦法就是與橫琴合作，透過增加澳門的區域合作協議，既對接國內，也連通海外。

Prof. Davis Fong, Director of the Institute for the Study of Commercial Gaming, says this year’s policy address boldly puts forward some projects that has for a long time remained merely ideas, such as extension of the free port policy, calculating the percentage of Hengqin’s GDP attributable to Macao, and registration-related issues in Chinese medicine, which will all help the long-term development of Macao. However, the core success factor is still relied on the main support from the nation. Prof. Jacky So, a chair professor in the Faculty of Business Administration, says that Macao’s heavy reliance on the gaming industry is both a disadvantage and an advantage. Prof. So believes that Hengqin can play an important role in the diversification of Macao’s economy, as Macao can set up financial institutions in Hengqin to handle bonds, RMB settlement, and other related transactions. He believes that with a clear positioning plan, the financial industry will have great potentiality in Macao. However, Prof. So also warns that as the government is vigorously trying to boost consumption, too much hot money may cause some economic problems.

Dr. Samuel Tong Kai Chung, President of the Macao Political Economy Research Association, believes that the “Individual Visit Scheme” in mainland China may not be able to immediately promote economic growth in Macao as expected after the epidemic comes to an end. A major problem facing Macao is its small scale of economy, and economic diversification does not equal industrial diversification. Dr. Tong believes that to achieve economic diversification in Macao, regional collaboration is necessary, and the most feasible way to do this is to collaborate with Hengqin. He says that Macao should also establish more agreements for regional collaboration with mainland China and foreign countries.

文化和智慧城市開啟澳門未來

The city of culture and wisdom opens the future of Macao

中國歷史文化中心代主任朱壽桐認為，是次《施政報告》將人才交流與“發展多元文化”緊密結合在一起，這是將發展多元文化落到實處的一種新思路。中華文化是澳門多元文化的主流，應該從人才培養、人才引進的角度促進中國歷史文化的發展。科技學院副教授黃承發認為，疫情突顯澳門智慧城市建設的不足，許多政府服務仍需要市民親身前往既定地點

處理。這次疫情如同「天鴿」，考驗着澳門城市的韌性。關於交通問題，他認為須從城市規劃、都市更新和智慧城市三方面合作解決。社會科學學院助理教授陳建新指出，灣區城市之間應建立統一的訊息發佈機制，他亦認為，社會服務應納入到智慧城市建設當中，如智慧養老、精準養老，這些數據的分析將有利於提升社會服務的水平。

Prof. Shoutong Zhu, Interim Director of the Centre for Chinese History and Culture, believes that this year's policy address combines talent exchange with promoting cultural diversity, which is a new way of thinking about promoting cultural diversity. According to Prof. Zhu, Chinese culture is the mainstream of a variety of cultures in Macao, and promoting Chinese history and culture should be pursued from the perspective of nurturing local talents and attracting non-local talents. Prof. Alfred Wong, an associate professor in the Faculty of Science and Technology, believes that the epidemic has highlighted the inadequacy of smart city development in Macao as many public services are still "in-person services". Similar to Typhoon Hato, the epidemic is testing the resilience of the city. Regarding problems in public transport, Prof. Wong believes that the solutions lie in collaboration between urban planning, urban renewal, and smart city development. Dr. Kin Sun Chan, Assistant Professor in the Faculty of Social Sciences, says that a unified mechanism for releasing information should be established in all cities of the Greater Bay Area. Dr. Chan also believes that some social services, such as smart pension and precise pension, should be included in smart city development, because they can help improve the quality of social services.

澳門研究年會 2020 擬於年底舉行 The Annual Conference of Macao Studies 2020 will be held in December 2020



去年，澳門大學澳門研究中心與澳門基金會首次合辦「澳門研究年會 2019」，吸引了眾多來自不同領域、同樣從事澳門研究的專家學者參與，分享其最新研究成果。「澳門研究年會 2020」擬於 12 月 9-10 日舉行，屆時，本地期刊《澳門研究》將聯同 SSCI 期刊《當代亞洲》和《國情導報》舉行聯合研討會。眾多有致力於亞洲、大中華和澳門研究的國際和本地學者將進行交流討論。此外，經評審後，其提交之論文有機會刊登於上述期刊。

Last year, the Center for Macau Studies and Macao Foundation took the initiative to hold the "Annual Conference of Macao Studies 2019", which attracted many experts and scholars who are from different fields but also engaged in Macao studies to share their latest research results.

The "Annual Conference on Macao Studies 2020" will be held during 9-10 December 2020. At that time, the local journal *Journal of Macao Studies* will jointly convened a seminar with the SSCI journals *Journal of Contemporary Asia* and *China Information*. Numerous international and local scholars who have devoted their studies to Asia, Greater China and Macao will engage themselves in plenty of academic exchanges and discussions. In addition, after the review, the papers submitted by the scholars may be published in the above-mentioned journals.

本簡報刊登有關澳門的研究，如欲投稿，可透過以下方式聯絡本中心：
Macao Studies Bulletin will share various studies provided by scholars or researchers. Please feel free to contact us as below:

電郵 Email: cms.info@um.edu.mo

網址 Website: <https://cms.um.edu.mo/>

編輯部：澳門大學澳門研究中心

Editorial Team: Centre for Macau Studies, University of Macau

顧問：楊秀玲

Consultant: IEONG Sao Leng

主編：林玉鳳

Editor in Chief: LAM Iok Fong

副主編：鄧安琪

Associate Editor in Chief: TANG On Kei

執行編輯：劉苑侶、陳超敏

Executive Editors: LAO Un Loi, CHAN Chio Man

設計：勞慶欣

Designer: LOU Heng Ian

版權由澳門大學澳門研究中心所有，未經許可不得轉載

Nothing may be reproduced in whole or in part without the prior written permission of Centre for Macau Studies, UM