

實現香港潛能 躍升國際都會

大嶼山發展成敗關鍵

HKGolden50



# 香港黃金五十

- 非政治、非牟利、獨立政策研究組織
- 兩個**核心信念**
  - 香港最美好的**五十年**在前面，而非過去
  - 教育程度最高的**八十後**接棒把香港建得更美好
- **黃金五年 (2010-2014) 盛衰關鍵**



# Section I: The Next 20 Years...

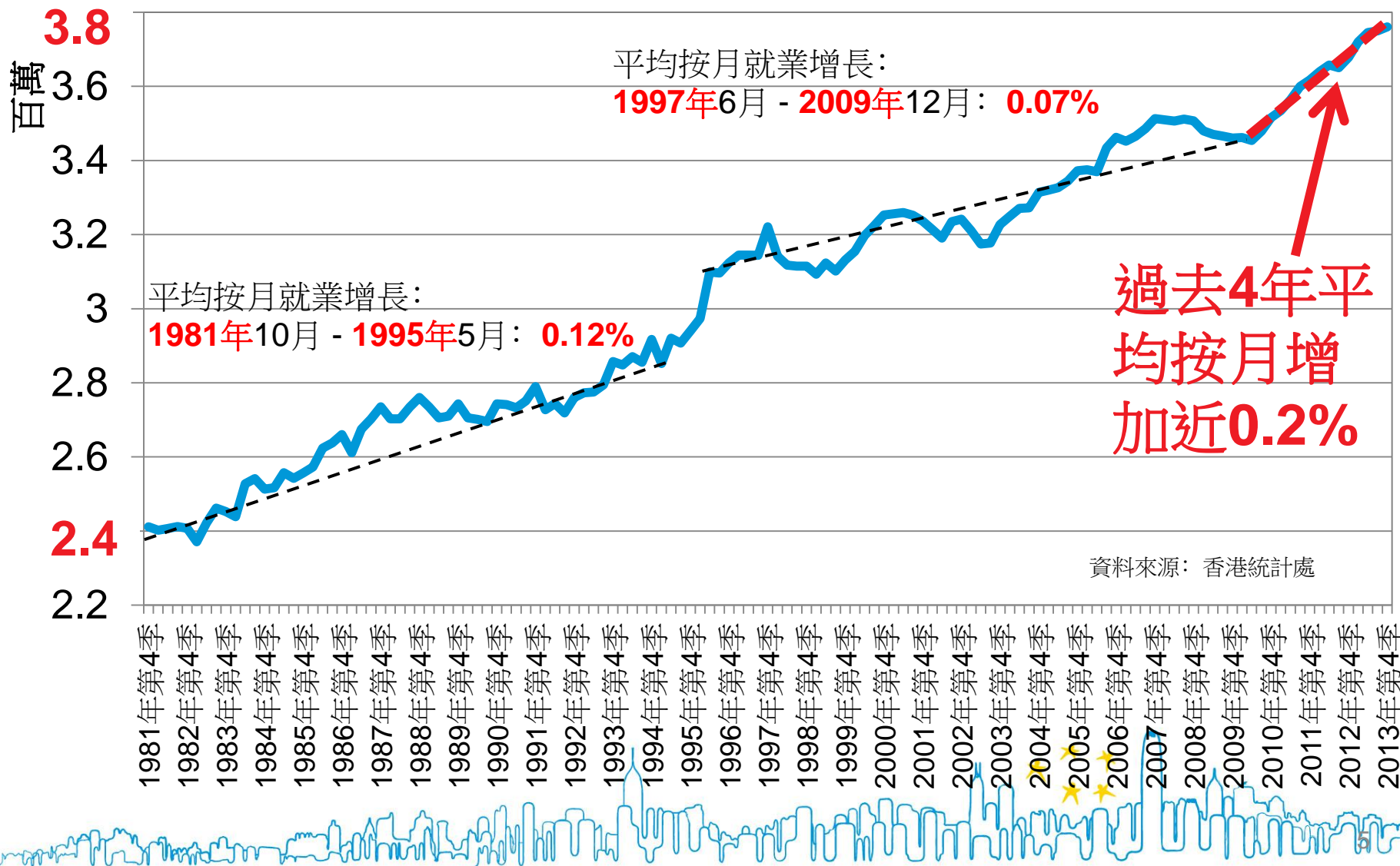
- **Global:**
- **Businesses/Capital More Mobile** than Currently eg Toyota California moving to Texas, Citic to HK...
- **Talents** and the affluent **More Mobile**
- **Winners Take All**
- **Western Economies Age Badly** (Boomers all retired); Consumption weak or falling as households have not saved enough for retirement, **Demand will be weak**
- Public Debts remain High as Welfare Payments rise with Ageing, Interest rates low, **Deflation risks are high**
- Automation takes away many jobs, **High unemployment**
- **Very Low Income Mobility** for the post-80<sup>s</sup>; Bright people move to escape rising unemployment or tax burden

# Section I: The Next 20 Years...

- **Local:**
- **Elderly** - almost 30% (2.2m Vs 1m now) of population
- **Asia** (ex-Japan) - Older but still **much younger than HK** and **source of c80% of global growth**
- **HK** at the **Centre** of Growth region
- Healthy private and public finances – healthy economy
- **< One-hour to 100m+ customers**
- The “Clustering Bonus” – capable of **the most difficult services** – the **Most Desirable city in Asia**
- **Structural Forces In Play (Golden 5 Years 2010-14)**
- **Double bottlenecks:** Hardware (Space) + Software (People)
- **Volunteering boom**

# 黃金五年——最高基數+最高增長

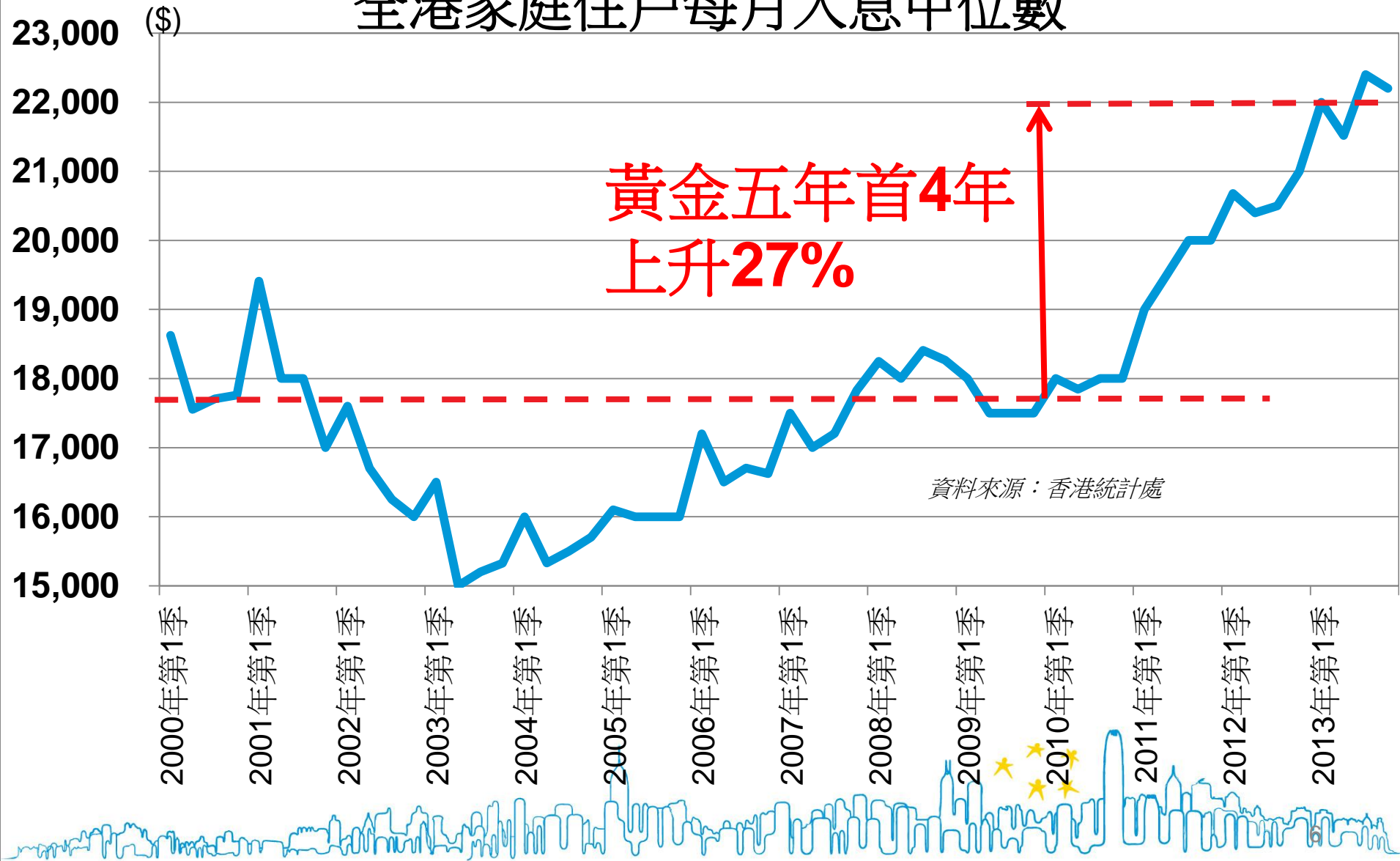
## 總就業人數



# 在過往4年，家庭入息中位數增加 **27%**

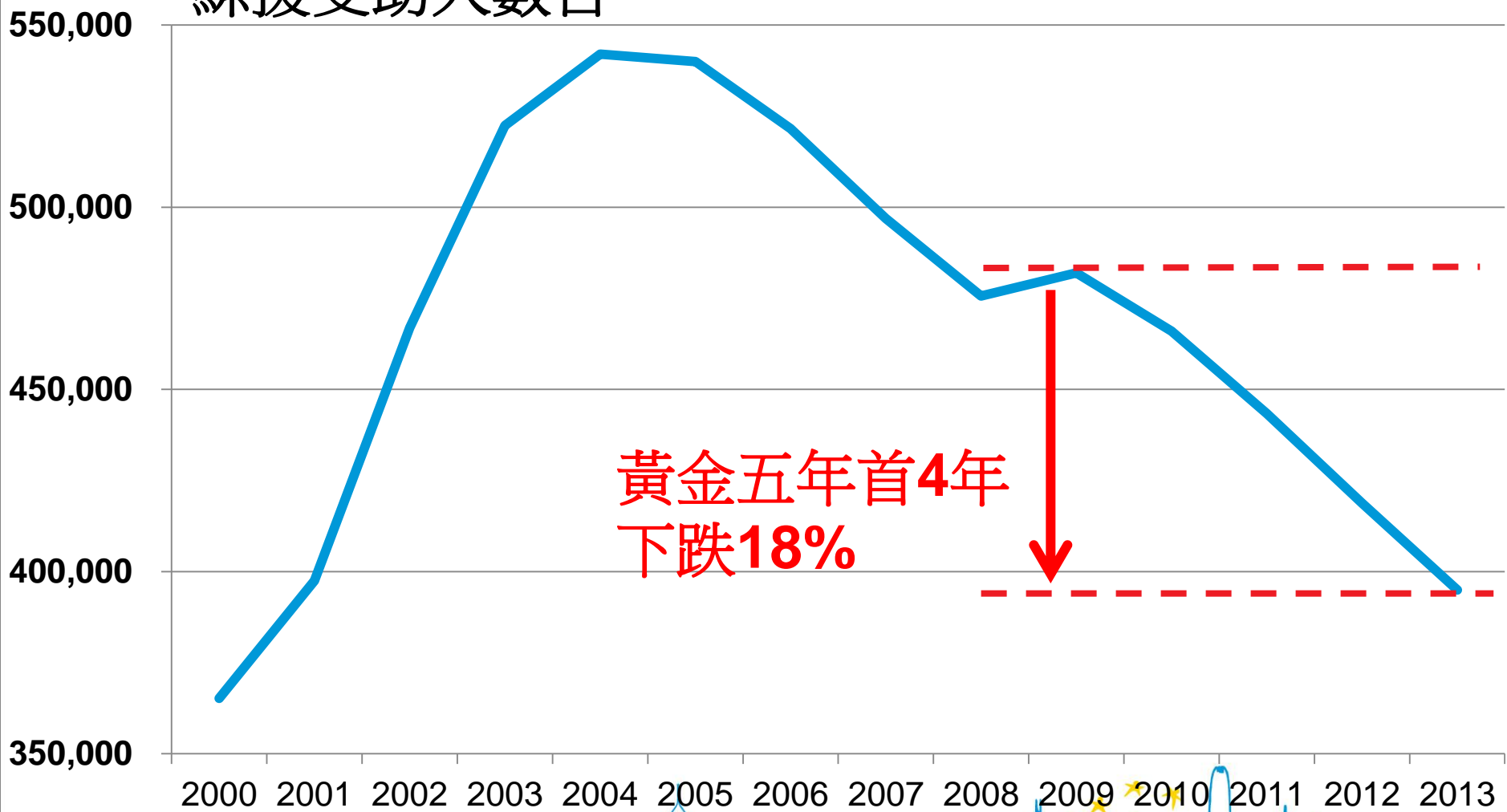


## 全港家庭住戶每月入息中位數



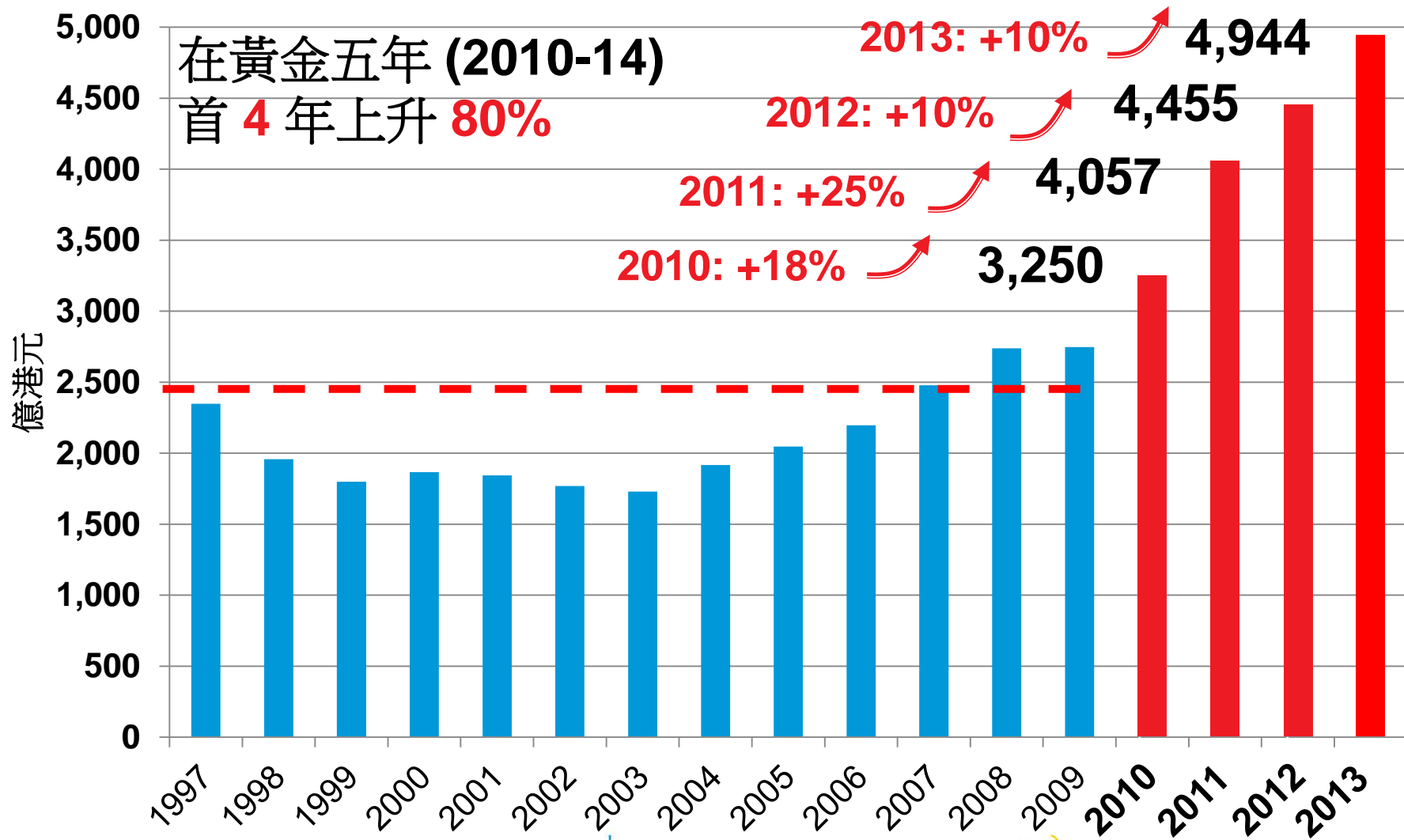
# 在過往4年，綜援受助人數減少 18%

## 綜援受助人數目



資料來源：香港統計處

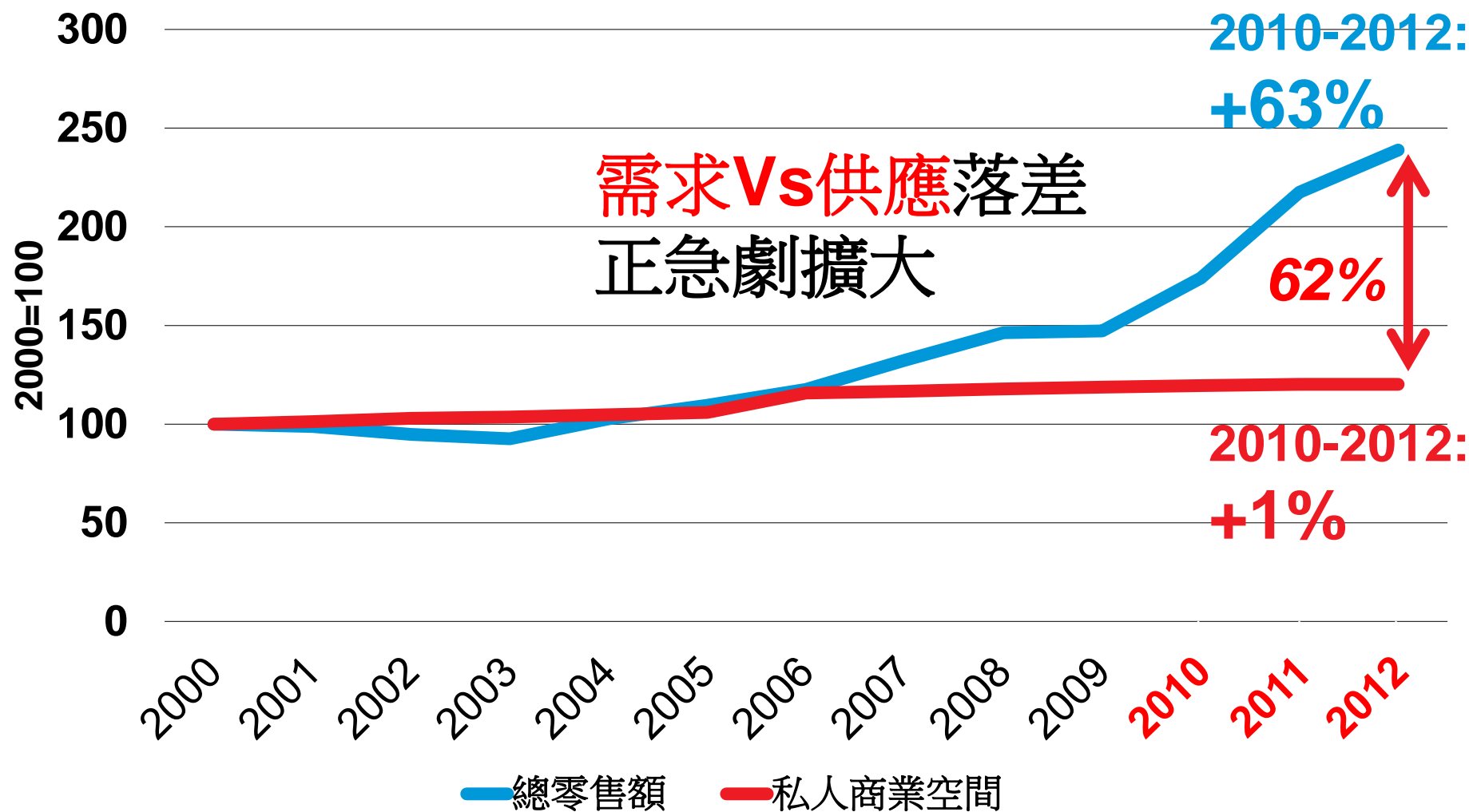
# 香港總零售額



資料來源：香港統計處



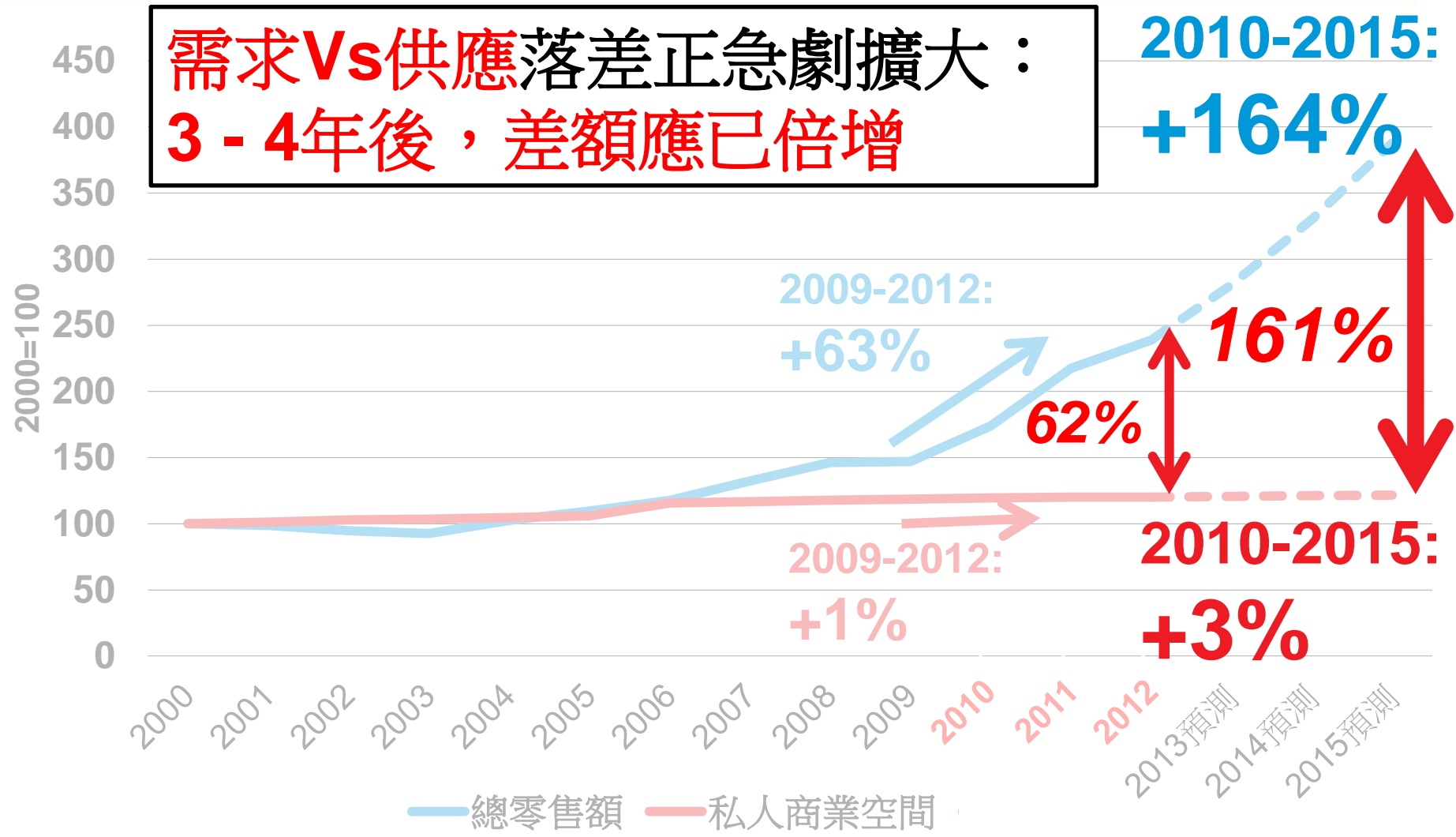
當零售額在頭 3 年增加 63% 時，  
零售空間只增加 1%



資料來源：香港統計處，差餉物業估價署

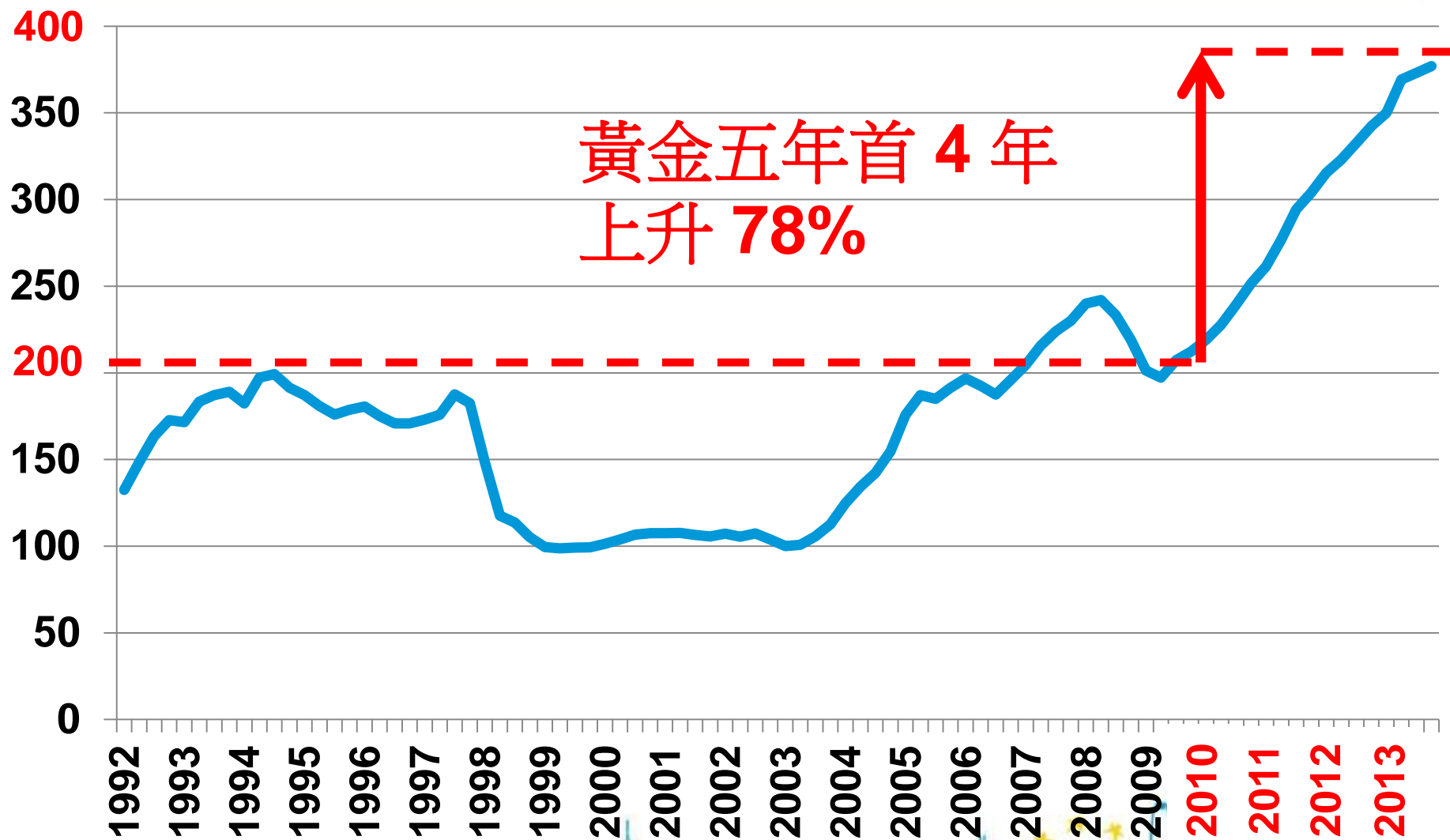
當零售額在頭 3 年增加 63% 時，  
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**需求Vs供應落差正急劇擴大：  
3 - 4年後，差額應已倍增**



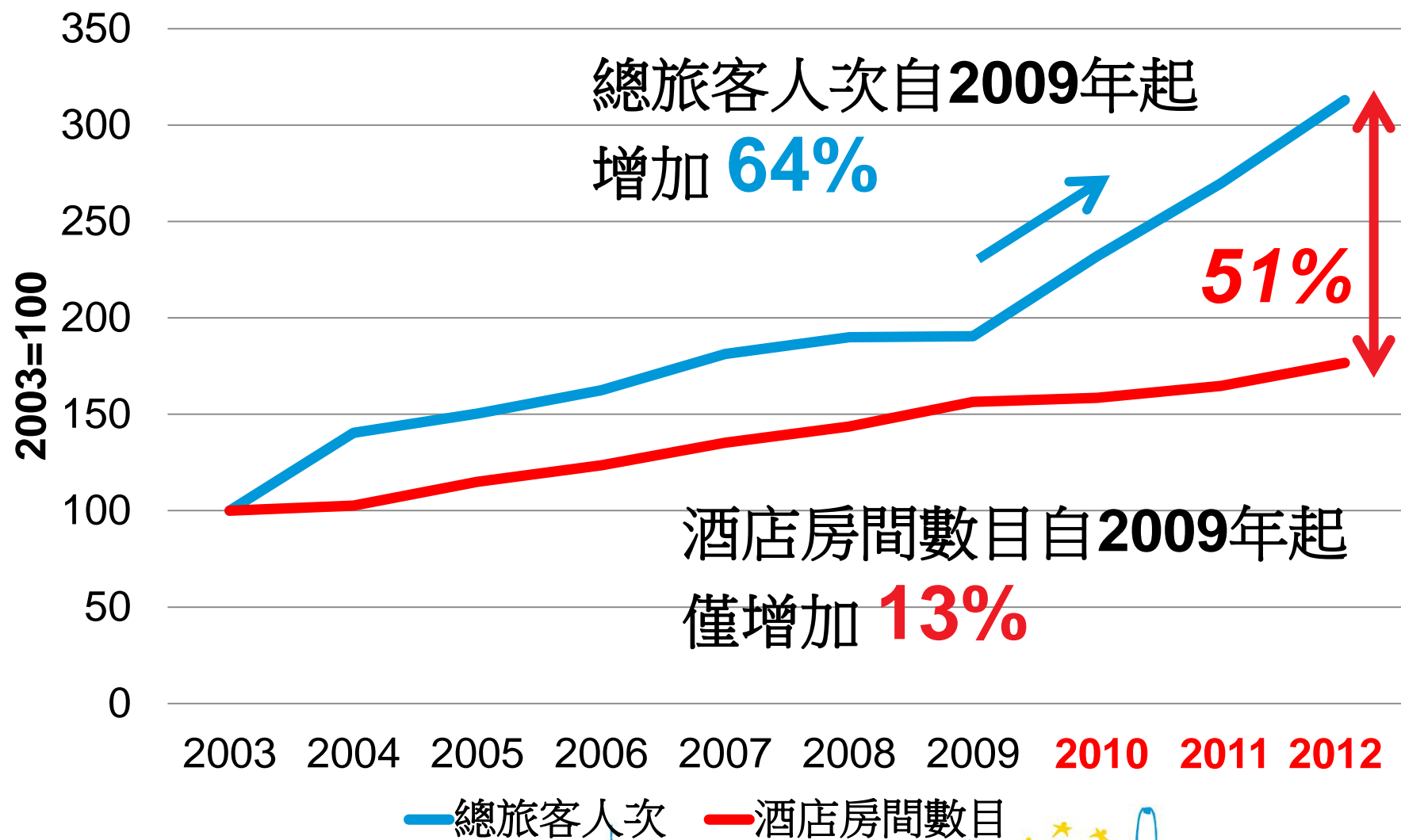
資料來源：香港統計處，差餉物業估價署

# 在過往4年，香港商場租金劇增 78%

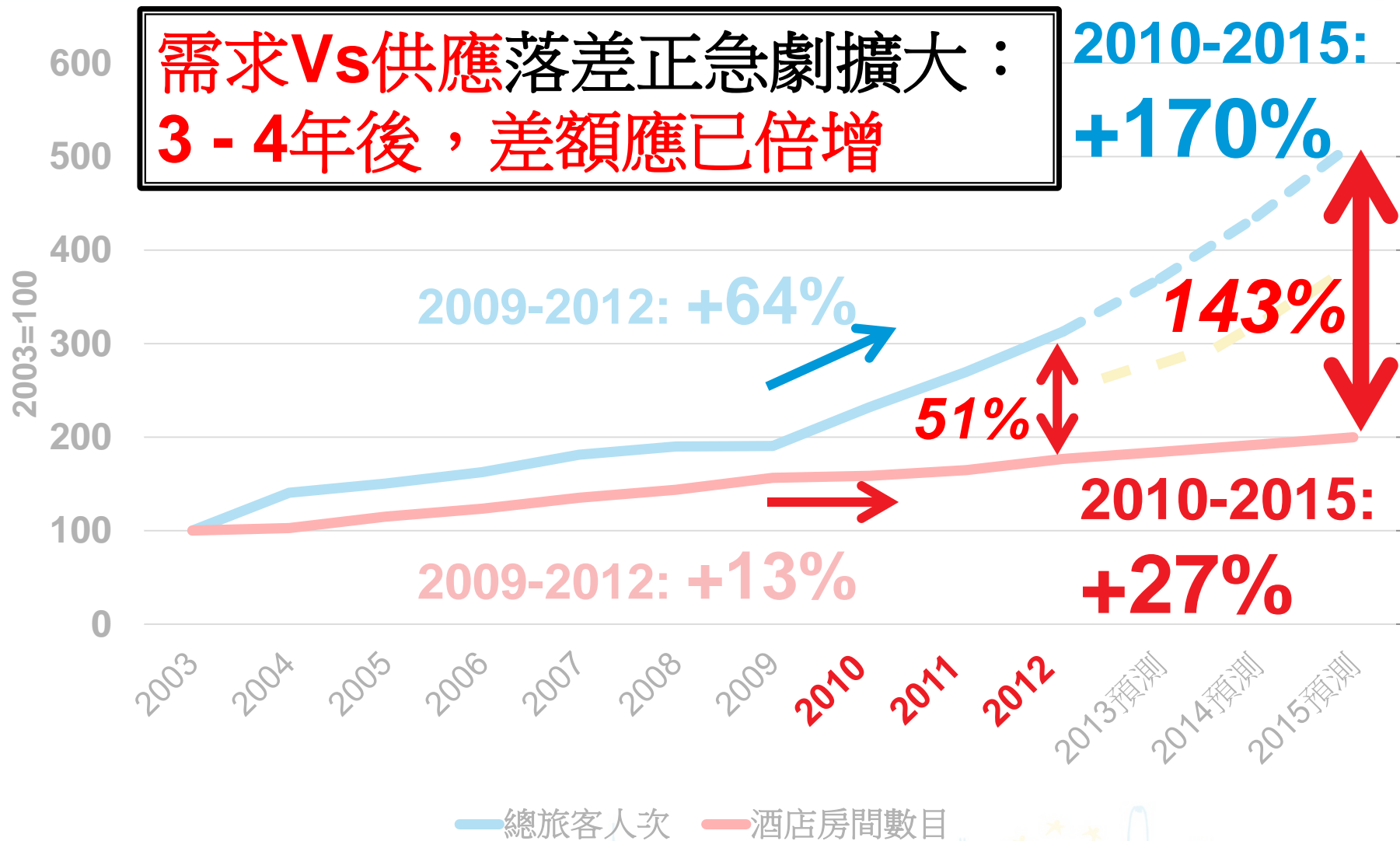


資料來源：第一戴維斯 (2003=100)

# 當旅客在頭3年增加 64% 時， 酒店房間只增加 13%



當旅客在頭 3 年增加 64% 時，  
酒店房間只增加 13%



資料來源：香港旅遊發展局

# 香港過夜旅客快將超越倫敦

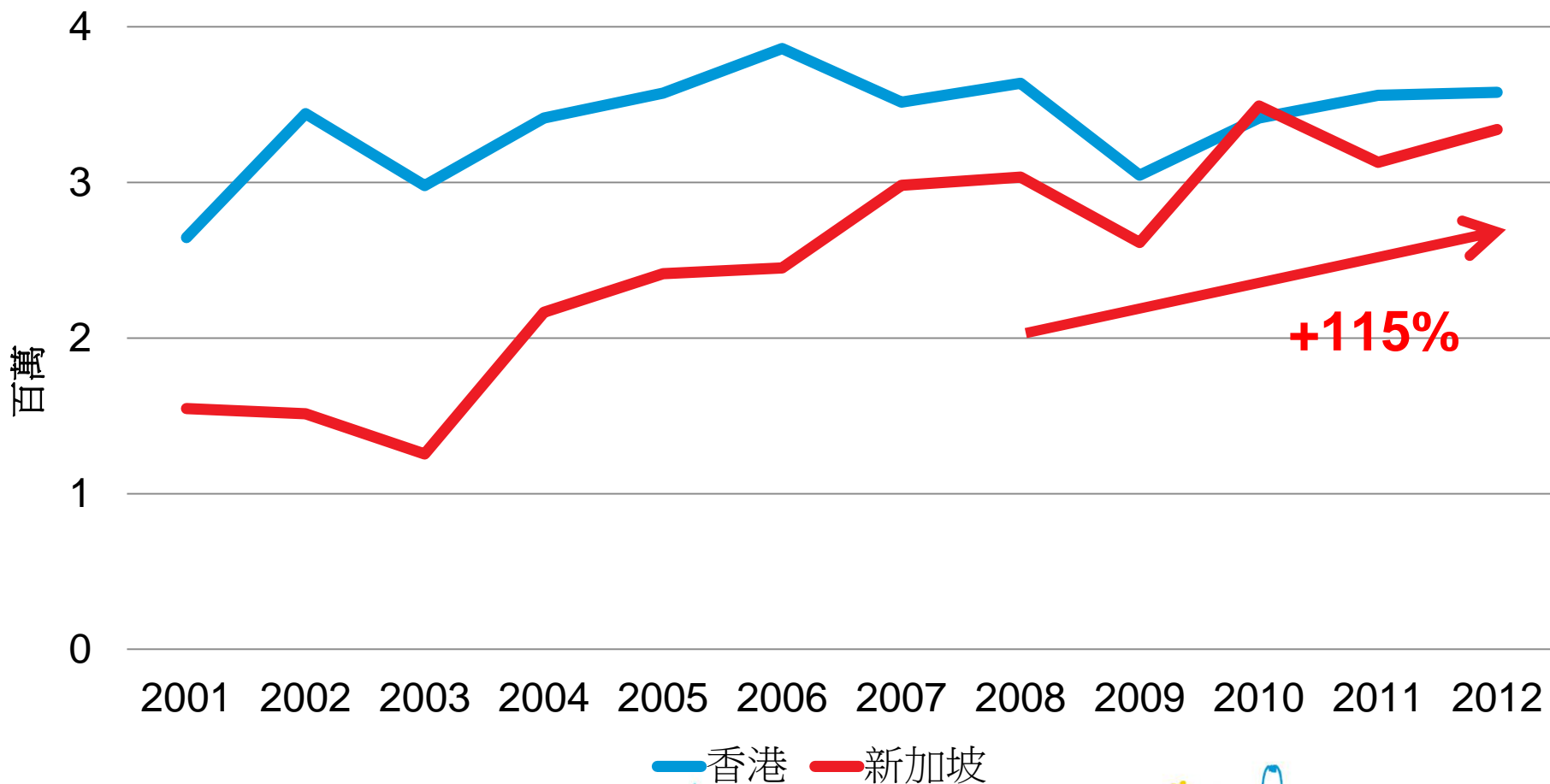
2013	香港	倫敦
酒店客房數目	68,677	123,000*
過夜旅客人次	25,661,072	26,382,000*
總旅客人次	54,298,804	N/A#
商業旅客人次	3,585,165	2,775,000*
總旅客消費(十億港元)	296	114^*
食肆數目	15,760	9,000
博物館數目	54*	250*

#沒有資料，^只包括國際旅客消費，\*2012年數字

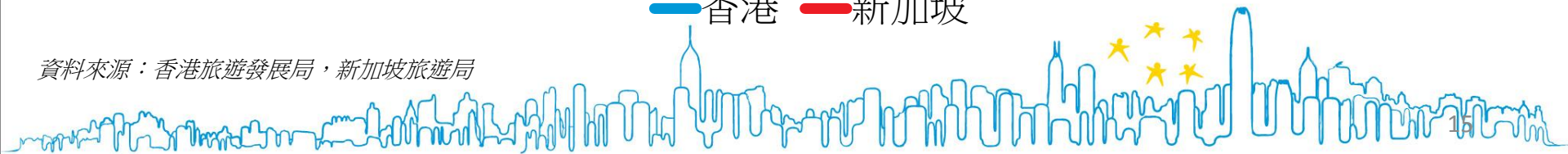


# 新加坡努力追趕

## 商務旅客人次(連會展獎勵旅遊“MICE”)



資料來源：香港旅遊發展局，新加坡旅遊局



# 「結構性」增長

## > 人口老化經濟衰退





# 雙樽頸將抹殺黃金 6、7、8年...

# Section II: Lantau/HK The Next 20 Years...

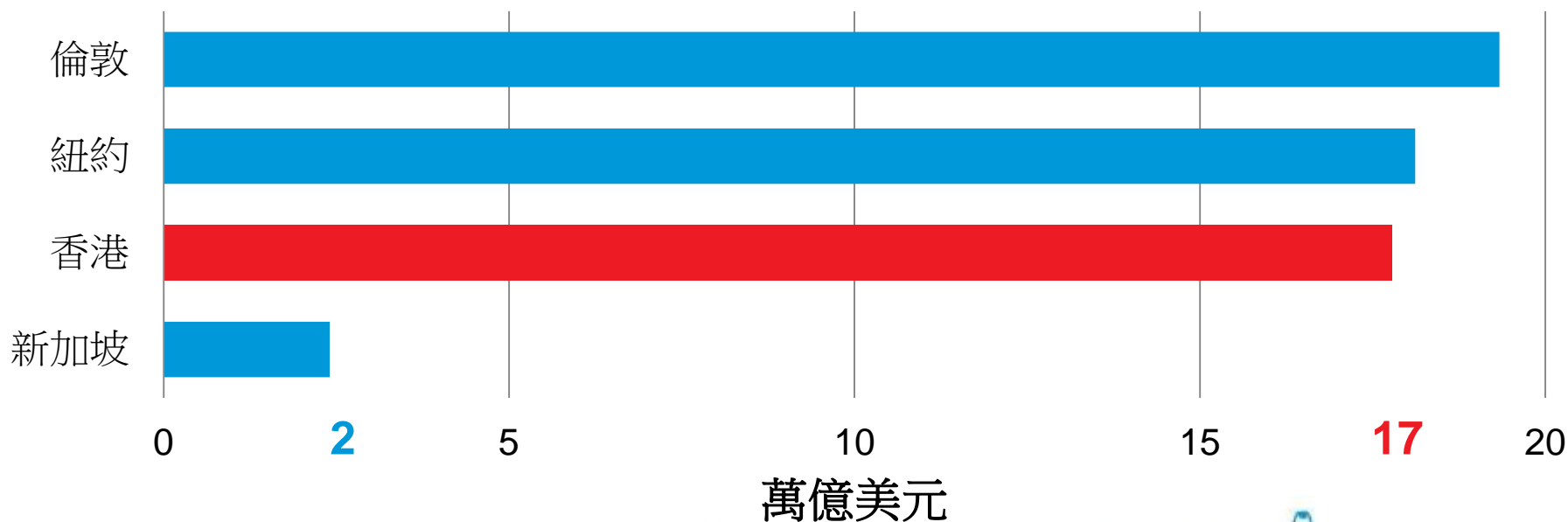
- **Set for Sustained Structural Growth**
- Priority – **Make HK the “Take-all” Winner** – Provide the Hardware to Attract Customers, Businesses, Capital and Talents to Come to HK
- The **Structural Opportunities are Clearly There**
- **World City** = Collecting Full Set of the Most Difficult Service Capability “Stamps” => **Big Clustering Premium** => **Brand Bonus**; eg  $1+1=3$  (say retail, arts, stocks, Rmb) ...  $3+3=9$  (retail + arts or stocks or Rmb) ...  $9+9=30$  (retail + arts + stocks + Rmb) ...  $30+30=100$  (+ medicine + education...)
- Credibility business – Finance, Art, Retail, F&B, Medicine, Aviation, Education...
- **Build expandable hardware for the new decades**



# 香港發展岔路：(一)倫敦；(二)被遺忘

- 投資把服務業造大造好，則成為**國際都會 (World City)**；束手度過，則被世界遺忘
- 香港處於亞洲經濟心臟

四小時航程內的地區名義生產總值 (2014年)



資料來源：國際貨幣基金組織

# 香港如何躍升國際都會

## 香港發展瓶頸

生活空間短缺

商業空間短缺

迫切勞工短缺  
及退休潮

人口老化  
及醫療危機

空氣質素惡劣

文化沙漠

## 千億投資改造香港

發展東涌為世上最理想的  
(環保和高增長) 新市鎮

於香港國際機場建造  
1,100萬平方呎綜合服務中心「環球薈」

於西九龍文化區地下建造  
200萬平方呎商場「Sub-Culture」

增加10,000個政府資助大學學額

擴充職業訓練局及僱員再培訓局的  
再培訓容量，每年額外培訓40,000人

未來10至15年吸引200,000名全球精英來港

公立醫院聘請8,000名新醫生

未來20年興建9間新醫院，增加19,000張床位

把4,000架歐盟I及II型舊巴士  
更換為較環保新型號

立即上馬興建西九龍文化區  
並爭取於2018年開放25%

## 國際都會—香港

最環保國際都會

頂尖金融中心 —  
蓬勃經濟發展

文化及價值輸出者

服務業天堂

繁榮全民共享

人性化及和諧社會

# Flying Dragon Metropolis (North Lantau Cluster) – IV Design Considerations

- The **Most Desirable** Location for **(I)Work** and **(II)the Family** in PRD for the next 50 years:
- **(I)Work:**
  - (1)The **Most Convenient** Metropolis in Asia – arrival by land, air or sea – No need to go to the “city” to enjoy HK;
  - (2)**“Destination” in Scale and Content** ie worthy of making a special trip to HK;
  - (3)**Showcase of Best Services** of HK, including Retail, Arts, Education, Finance, Healthcare, NGO, F&B, Exhibition & Conventions, Entertainment;
  - (4)**Comprehensive** range of goods and services, with full ecosystem support spaces set up nearby eg offices; Diversity of jobs makes an interesting community;

# Number of new brands entering HK 2012 = 2x of Shanghai+Beijing



# Flying Dragon Metropolis (North Lantau Cluster) – IV Design Considerations

- (5) With (4)+(5), FDM will be the most Convenient/ Competitive/ Attractive “**One-Stop, Everything**” location in the whole of Asia – an unassailable lead for our young generation;
- (6) **Aerotropolis** is part of FDM; the airport provides distance-shrinking links to far away locations, and will draw more customers to HK services.
- **(II) the Family:**
- (1) Hardware: **Best Environmental Standards** – BREEAM (setting a new category standard called **HD** communities) & LEED; waste processing, district water cooling as standard;



# Flying Dragon Metropolis (North Lantau Cluster) – IV Design Considerations

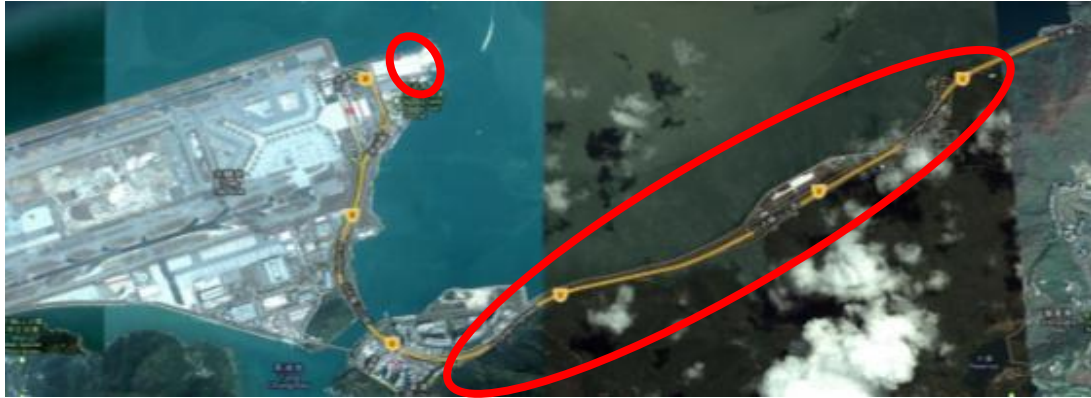
- (2) **Least travel time** re work/study/play/community (**Zero Carbon Footprint**) – more time for family;
- (3) **Scale 700,000 residents & Scope to Double+** – lessons from London/NYC;
- (4) **Diversity of residents** (follows from (4) above); Not “mono-culture” - lessons from Pudong etc;
- **(III) Funding:** The combination of (I) and (II) guarantees sustained commercial and fiscal success (land sales and taxes) for FDM and HK;





# 全球最方便最環保服務中心

- 七千萬人全國最富裕最外向經濟PRD中心



- 舉例, 北大嶼山, 包括由香港國際機場擁有在赤鱸角的商業用地, 暫稱為「**環球薈 (Gateway to the World)** “GTTW”」, 可用面積1100萬平方呎 + 70萬人全球最環保市鎮「**飛龍**」; Destination Complex GTTW + Greenest HD Community = **Most Desirable Place for Work & Family in PRD = “One-Stop, Everything”**



# 環球薈提供無史無前例的方便， 一下機/下車便可享受世界級服務



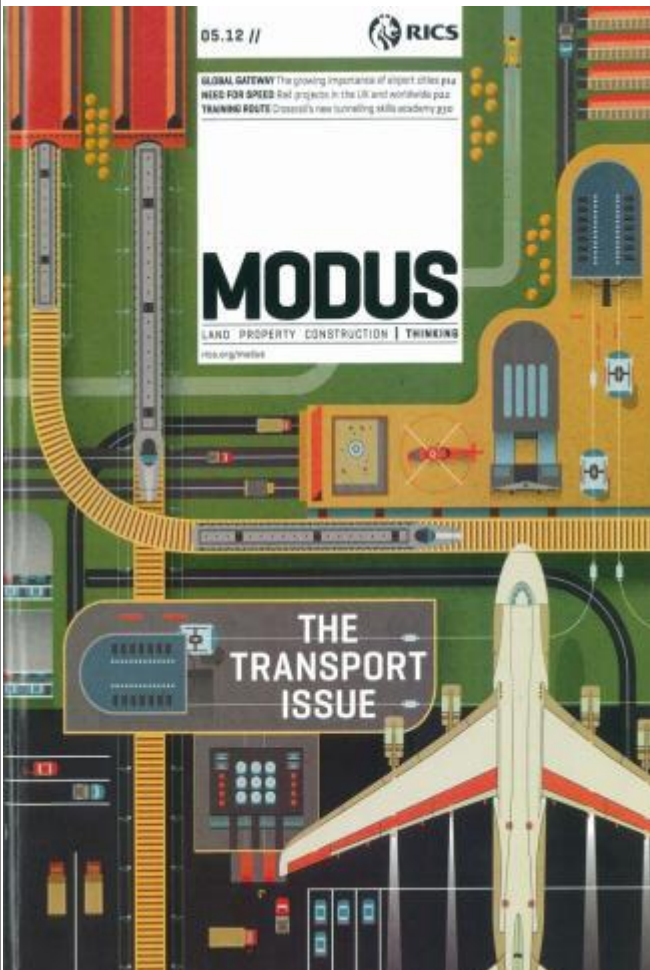
# 大東涌飛龍計劃

飛龍計劃填海範圍？



# City Airport to Airport City

RICS May  
HKGolden 50  
2012

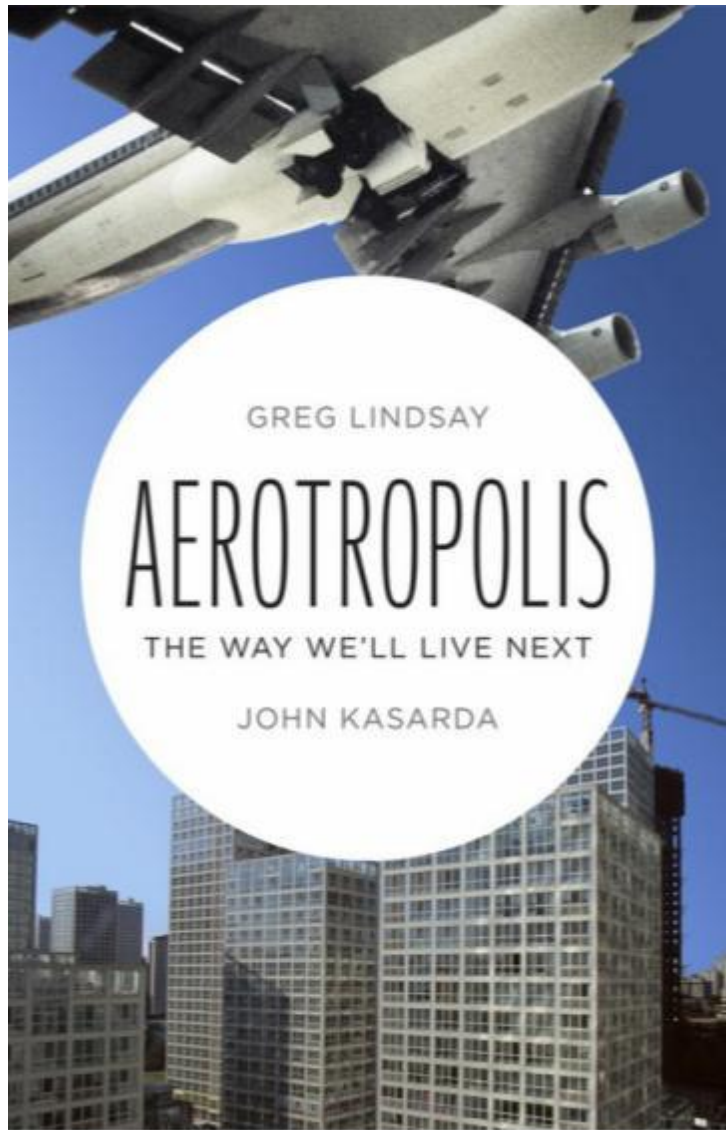


*'Throughout history, the dominant form of transportation predicates the form and influence of any city'*



*'Every regularly scheduled flight that travels through a hub airport supports around 2,000 jobs'*

# Aerotropolis is Already the Norm HKGolden



## Airport

Incheon Intl  
Airport

Dubai Intl  
Airport

Schiphol  
Airport

Zurich  
Airport

## Aerotropolis

Songdo Intl  
Business Dist.  
(600 ha)

World Central  
(14,000 ha)

Schiphol  
Airport City  
(GFA: 22m sf)

The Circle  
(c.100 ha)



# Flying Dragon Metropolis (North Lantau Cluster) – IV Design Considerations

- **(IV) Think Big, Think Very Big!:**
- (1) Lantau, Tung Chung - **NOT “Bridgehead Economy”** but **“HK Economy + Community”** for next 50 years;
- (2) Design in **Flexibility** to Double/ Triple...: World City HK, unlike London/NYC, should not have capacity problems; Solution: Pudong, Hangzhou, Zhujiang New Town etc.
- (3) Design in **Diversity** – we do not want “monoculture”, no Macau gaming, no DisneyWorld, no airport city... - they make “boring” neighbourhoods and breed narrow mindsets



# 400萬平方呎地標商場，內有逾600商店及餐廳



# 逾400張床位之100萬平方呎醫療服務中心





# 六至八間二至五星級酒店，共**3,000**房間



一**100**萬平方呎寫字樓以提供更多認證、支援、  
非政府組織和其他「信譽」服務行業



# Flying Dragon Metropolis (North Lantau Cluster) – IV Design Considerations

- **(IV) Think Big, Think Very Big!:**
- (4) Designed to house **ecosystems**, not single functions (cf Clustering Effect); NOT A (i) Shopping District (ii) Airport Town (iii) Medical District (iv) Residential New Town (v) NGO City (vi) Innovation Zone (vii) Financial District (viii) Art and Kool Enclave...But **ALL OF THE ABOVE**
- (5) **New Planning Standards** – to reflect Best-in-Class Green standards eg water cooling + waste, New Technology eg noise insulation, New reality eg limited land, Compact Living can be desirable.



# Flying Dragon Metropolis (North Lantau Cluster) – IV Design Considerations

- (IV) Think Big, Think Very Big!:
- (6) Don't worry, HK has never had **white elephants** in buildings of any type
- (7) **Virtuous cycle** - more talents/ businesses/ capital/ customers will be attracted in, adding further economic and social dynamism.



# Clustering Bonus – PRD from strength to strength

- 21st century competition is between **regions, not cities**
- **Super Rich content of PRD region:**
  - Entertainment: Macau gaming revenue US\$42bn vs Las Vegas US\$6bn
  - Newly opened Hengqin Chimelong Resort c20m visitors per annum vs DisneyWorld's 17m; 2 wild safari parks within 100km of each other!
  - Perfect blend of finance & high-tech – HK+Shenzhen = NYC+Silicon Valley, just thousands of miles closer to each other
  - Cleanest and freest region of China

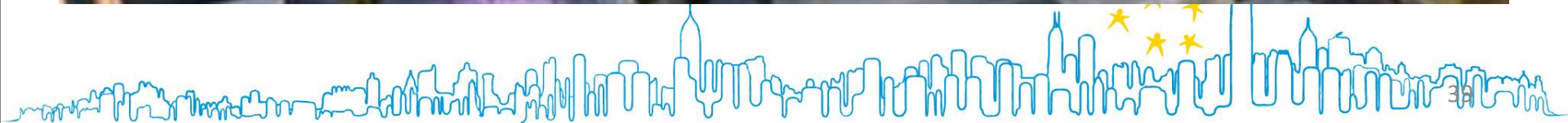


In December 2013, Singapore awarded contract for “The Pearl” a multi-m sf retail centre joined to T1,T2,T3 for opening 2018. Clearly, with T4 and T5, the city is upsizing Changi into an Aerotropolis



# On 28<sup>th</sup> October 2013, S.Korea announced US\$1.7bn 4m sf Paradise City at Incheon Airport

- a commercial complex with a casino



**In October 2013, UK Chancellor, George Osborne, announced Manchest Airport City project during his Beijing visit. It will provide 5m sf of commercial and logistics spaces.**





# 向澳門借鏡 – 迎好而上

- 十年前，澳門開始**擴充博彩業**規模(即是回應需求) → 數年間生意額已**超越拉斯維加斯** → 更多旅客 → 更多擴張生意空間
- **不夠本地勞動力** → 從全球入口勞工 → 繼續擴張 → 在選擇更多和服務水平不斷進步下，繼續吸引更多顧客 → 良性循環 → 市場等於**7個拉斯維加斯** → 澳門**人均GDP**已是香港**2.3倍 (1997: 0.5倍)** → 儘管**26%勞動力**是從外地入口，仍在加薪幅度和就業超越香港
- **新加坡**亦在上演同樣良性循環故事：有**90萬**外地入口勞工，**佔勞動人口28%**。在落後香港**25年**後，終於在**2004年**起超越香港 → **人均GDP**現已高香港**40%**



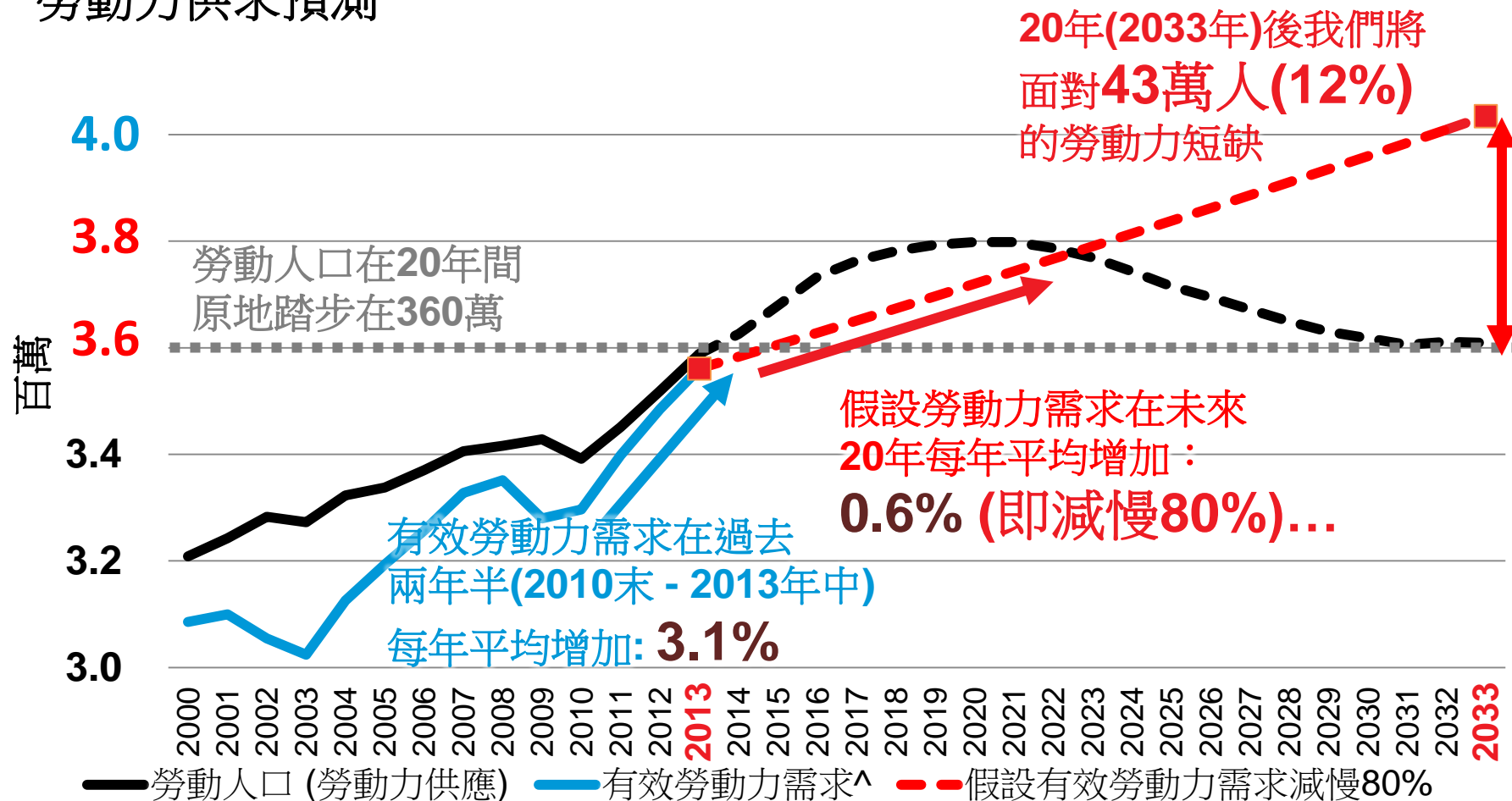
# 機會處處 - 人人有工開！

- 同樣的**結構性良性循環**已在港上演→在過去**3年半**全球經濟衰退間，勞動人口升6%、**就業人口升7% (史上最快速)**→家庭**收入**中位數在3年間**升25%**→就業最理想行業：在空缺數目按年升幅方面，(1)酒店及餐飲業升41%；(2)建造業升40%；(3)零售業升15%
- 2010年起，我們**實質勞動力需求每年增長3.1%**→即使**減少8成**，仍有每年0.6%→**乘以20年**，即總需求**增加12%**→但**2030年**勞動人口只**與2010年相約**→勞動力短缺達**12%**！豈止人人有工開，簡直是工等人做！



# 結構性增長令職位不斷增加

## 勞動力供求預測

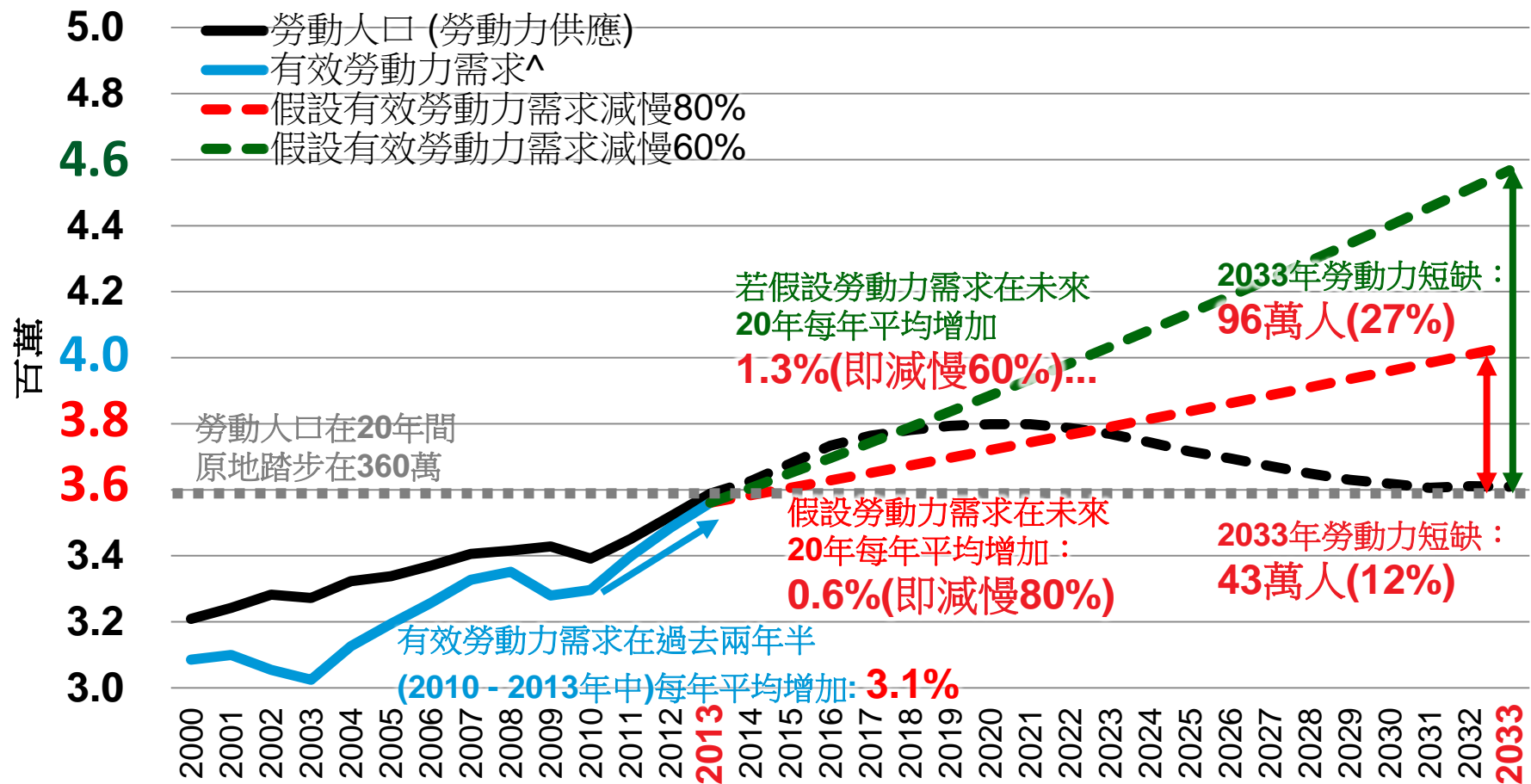


註: <sup>^</sup> 有效勞動力需求指就業人數及職位空缺的總和。以上數字不包括外籍家庭傭工。

資料來源: 香港統計處、HKGolden50

# 結構性增長令職位不斷增加

## 勞動力供求預測



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迎「結構性」機會而上，  
建“**One-Stop, Everything**”  
→為下一代製造高增值的工作  
及最環保的理想家園！

