

Success of Regional Development Strategy

區域發展戰略成效顯著

Report shows how targeted policy support and industry clusters are helping cities to grow and building a more balanced society

報告顯示定向政策支援和產業集群有助城市發展及建設均衡社會

The “Best Performing Cities China Index 2021” from the Milken Institute, now in its seventh edition, highlights the urban centres that saw the most rapid economic development over the year. Perry Wong, the Milken Institute’s Managing Director for China and author of the report, shared the key findings at a seminar on 26 July and discussed the country’s regional development strategy.

Wong said he prefers not to use the word “model,” when referring to China’s development, which implies a static plan.

“I would rather call the last 35 years a non-stop continuous evolution of adapting to each stage of development,” he said.

China’s reform and opening-up policies have not followed a steady path, and there has been a lot of back-and-forth, with liberalization sometimes

followed by restrictions. But the broader direction has remained the same, Wong said, aiming to build a better society, stronger economy, and lift citizens out of poverty through three key strategies: urbanization, industrialization and industry clusters.

These industry clusters play an important role in the country’s regional development. Wong noted that they are not unique to China, and have also shaped the economic growth of Taiwan and South Korea. But outside China, industry clusters have tended to evolve over a longer time period as connections develop among related sectors.

In the United States, for example, a biochemical and pharmaceutical cluster stretches from Boston to Washington DC, connecting players including hospitals and universities in New England, pharmaceutical

firms in New Jersey and Delaware, and policy experts in the capital.

In China, however, the Central Government has actively promoted industry clusters, which greatly shortens the time span for their development.

Wong explained that the index uses a wide range of available economic information including employment, FDI, output, and the percentage of the economy that is high-value sectors.

“This year’s ranking is one of the most pronounced in terms of demonstrating how policy helps drive the growth rate in certain regions,” he said.

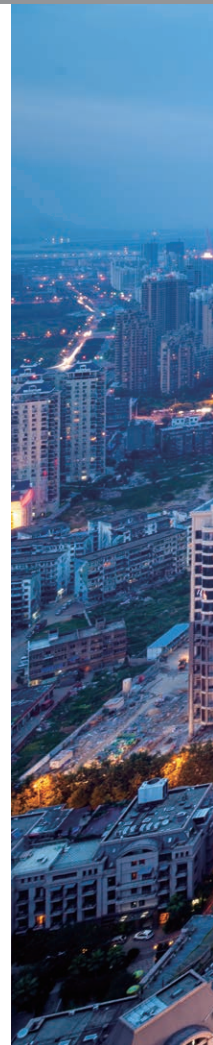
This year, Haikou in Hainan Province is ranked number one among first- and second-tier cities, demonstrating the impact of a range of measures.

“Around five or six years ago, the Central Government started to introduce policies

to make Hainan a more attractive destination for investment,” Wong explained. “They identified several areas including health, finance and retail – in addition to its established tourism industry.”

Then, in 2018, the Central Government made Hainan Province a free trade zone, which further facilitated Haikou’s economic growth.

Ranked second is Guangzhou. Wong noted that large, diverse and stable cities like Guangzhou do not usually





feature so highly, as their growth is likely to be more moderate. But again, policy initiatives are driving the growth.

“Guangzhou’s ranking says a lot about the momentum of the Greater Bay Area,” Wong explained. “The impact of the policies and investment is now showing up in the growth for the city.”

Two other top-ten cities Wong said are worth paying attention to are Wuhan and Changsha.

“The Chinese government wants to grow the big cities in the central region, like in the landlocked provinces of Anhui, Hubei and Hunan. These were kind of forgotten during the first 20 years of China’s opening,” he said.

Now, the focus has shifted as the Government aims to share the country’s equity more evenly among all its citizens. “If we want to achieve a stable consumer-based economy in China, we need everyone to shine.”

To encourage growth in these central cities, the Government has allocated preferential treatment – not necessarily capital. There are also policies to link production facilities with local research and development, and to connect them with more advanced cities.

The Index has a separate ranking for third-tier cities. An interesting development in this year’s list is that five of the cities in the top ten are in Anhui Province. Various

reasons have spurred Anhui’s recent growth, including the development of high-speed rail lines. The growth in these cities also demonstrates the success of the Government’s poverty elimination efforts in the past six or seven years.

“If you go into the fringe areas of third tier cities, they tend to be very poor and drag down the city,” Wong explained.

“The Government has tried to reverse that by investing in a number of areas. Firstly, by building roads to connect the

outer fringe with highways and high-speed rail, which improves mobility and people's access to goods."

It has also encouraged production plants that use low-skilled labour to relocate to these areas, to provide more employment for local people so they don't need to migrate.

Another factor is that Anhui is adjacent to Hunan Province,

and together they make up an agricultural region that benefits from very fertile land, a large population base as well as the recent transportation upgrades. If the technology sector in the region cooperates with the agricultural sector to improve efficiency, the future prospects are promising.

Wong also noted that cities can change course, using

the example of Dongguan. After years of being a hub for low-end manufacturing, the city became a pilot for reindustrialization and largely got rid of these high-polluting industries.

"The companies coming in now have been technology businesses, which shows how policy can work in that particular scenario," he said.

This also shows how development models and industry clusters are not set in stone, and can change quite rapidly given policy support. At the same time, if new measures are deemed to be too drastic, they can be rolled back.

"The Chinese planners and leadership are still finding the best way, and fine-tuning their policies over time," Wong said.

米爾肯研究院發表第七份《中國最佳表現城市指數》報告，評估2021年經濟迅速發展的城市表現。在7月26日的研討會，米爾肯研究院中國區董事總經理及報告作者黃華躍分享報告重點，並剖析國家的區域發展戰略。

黃華躍表示應避免用「模式」一詞來形容中國發展，因為這帶有停滯不前的意味。

他說：「我認為中國在過去35年不斷演變，配合不同的發展階段所需。」

中國改革開放的進程並不平穩，一路上充滿顛簸起伏，往往在開放與限制之間搖擺不定。不過，黃華躍表示整體方向仍維持不變，即透過三大策略——城市化、工業化和產業集群，建設更美好社會、推動經濟發展及帶領人民脫貧。

產業集群在國家的區域發展中擔當重要角色。黃華躍指出這並非

“Guangzhou’s ranking says a lot about the momentum of the Greater Bay Area. The impact of the policies and investment is now showing up in the growth for the city.”

「廣州的排名顯示大灣區勢頭強勁，該市的蓬勃發展反映了政策和投資正發揮作用。」

— Perry Wong
the Milken Institute’s Managing
Director for China

——黃華躍
米爾肯研究院中國區董事總經理



中國獨有的現象，台灣和南韓的經濟增長亦有賴產業集群推動。然而有別於中國，其他地區需要較長時間建立相關行業之間的連繫，從而形成產業集群。

舉例說，美國的生物化學和製藥集群從波士頓延伸至華盛頓，連繫新英格蘭地區的醫院和大學、新澤西州和特拉華州的製藥公司，以及位於首都的政策專家等不同持份者。

在中國，中央政府積極推動國內的產業集群發展，大大縮短了發展過程。

黃華躍解釋，指數採用廣泛的經濟數據，包括就業率、外商直接投資、產出量及高價值產業的經濟佔比。

「今年的排名充分反映政策有效提升部分地區的增長率。」他說。

海南省海口市今年榮膺一二線最佳表現城市榜首，可見一系列措施成效顯著。

黃華躍解釋：「約五至六年前，中央政府開始推出多項政策，提升海南的投資吸引力，除了發展成熟的旅遊業，亦集中發展醫療保健、金融和零售行業。」

其後，中央政府在 2018 年宣布建設海南自由貿易港，進一步帶動海口的經濟增長。

排名第二的城市為廣州。黃華躍指出，多元穩定的大城市增長較為和，不常名列前茅，但受惠於政策措施的推動，廣州同樣增長強勁。

「廣州的排名顯示大灣區勢頭強勁，該市的蓬勃發展反映了政策和投資正發揮作用。」黃華躍說。

RESULTS FROM BEST PERFORMING CITIES CHINA

中國最佳表現城市排名

Ranking 排名

Rank 排名	First- and second-tier cities 一二線城市	Rank 排名	Third-tier cities 三線城市
1	Haikou Hainan (海南省 海口市)	1	Chuzhou Anhui (安徽省 滁州市)
2	Guangzhou Guangdong (廣東省 廣州市)	2	Fuyang Anhui (安徽省 阜陽市)
3	Xi'an Shaanxi (陝西省 西安市)	3	Dongguan Guangdong (廣東省 東莞市)
4	Chengdu Sichuan (四川省 成都市)	4	Jiaxing Zhejiang (浙江省 嘉興市)
5	Shenzhen Guangdong (廣東省 深圳市)	5	Xuancheng Anhui (安徽省 宣城市)
6	Shanghai (上海市)	6	Zhuhai Guangdong (廣東省 珠海市)
7	Wuhan, Hubei (湖北省 武漢市)	7	Ji'an Jiangxi (江西省 吉安市)
8	Beijing (北京市)	8	Bozhou Anhui (安徽省 亳州市)
9	Changsha Hunan (湖南省 長沙市)	9	Lijiang Yunnan (雲南省 麗江市)
10	Zhengzhou Henan (河南省 鄭州市)	10	Maanshan Anhui (安徽省 馬鞍山市)

Source: Milken Institute
資料來源：米爾肯研究院

在十大最佳表現城市中，武漢和長沙亦值得注意。

他說：「中國政府銳意發展中部的大型城市，如安徽、湖北和湖南等內陸省份，這些地區在中國對外開放的首 20 年曾被忽略。」

隨着政府致力與全國更均衡地分享國家財富，現在的焦點有所轉移。「中國要邁向穩健的消費主導型經濟，就要實現全民共同富裕。」

為推動這些中部城市發展，中央政府除了提供資金和推出優惠措施，還透過政策連繫生產設施與本地研發機構，以及促進與較先進城市之間的聯繫。

該指數另設三線城市排名，今年一個有趣的現象是位列前十城市中有一半位於安徽省。當地近期

的增長有賴多項因素配合，包括高速鐵路的發展。這些城市的增長亦證明政府在過去六至七年的減貧工作已取得成果。

「三線城市的邊郊地區十分貧困，以致拖低了這些城市的整體水平。」黃華躍解釋。「政府正嘗試透過投資若干範疇，希望扭轉這個情況。首先，興建道路把邊陲地帶與主要幹道和高速鐵路連繫起來，從而改善流動性，讓居民能夠獲取貨品。」

當局亦鼓勵勞工密集的低技術製造業遷往這些地區，為當地居民提供更多職位，而無需出城打工。

此外，安徽毗連湖南省，形成一個農業地帶，共享肥沃的土地、龐大的人口及最近升級的運輸基

建。若然區內的科技業能與農業合作，提升生產效率，未來前景可期。

黃華躍又指出，城市可以改變發展方向。以東莞為例，該市多年來一直是低端製造業樞紐，如今已成為再工業化的先驅，大部分高污染產業已被淘汰。

「現在進駐的都是科技企業，可見政策措施從中發揮的作用。」他說。

東莞的例子亦說明了發展模式和產業集群並非無法改變的事實，只要有政策支持，也可迅速改變過來。不過，假如新措施被視為過於急進，亦可隨時撤回。

黃華躍說：「中國的發展規劃者和政府領導仍在尋找最佳的政策方案，並會不時作出調整。」