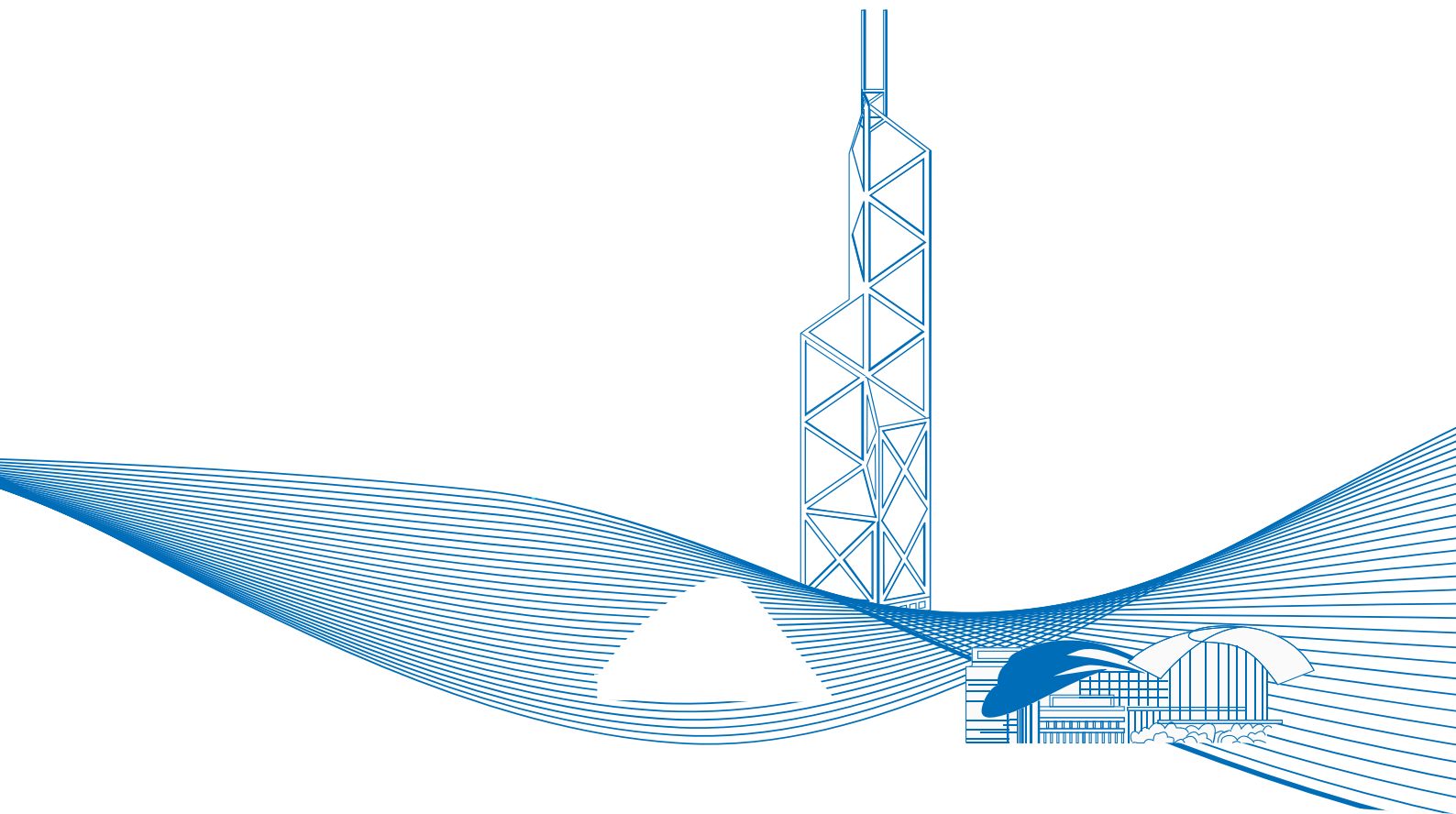
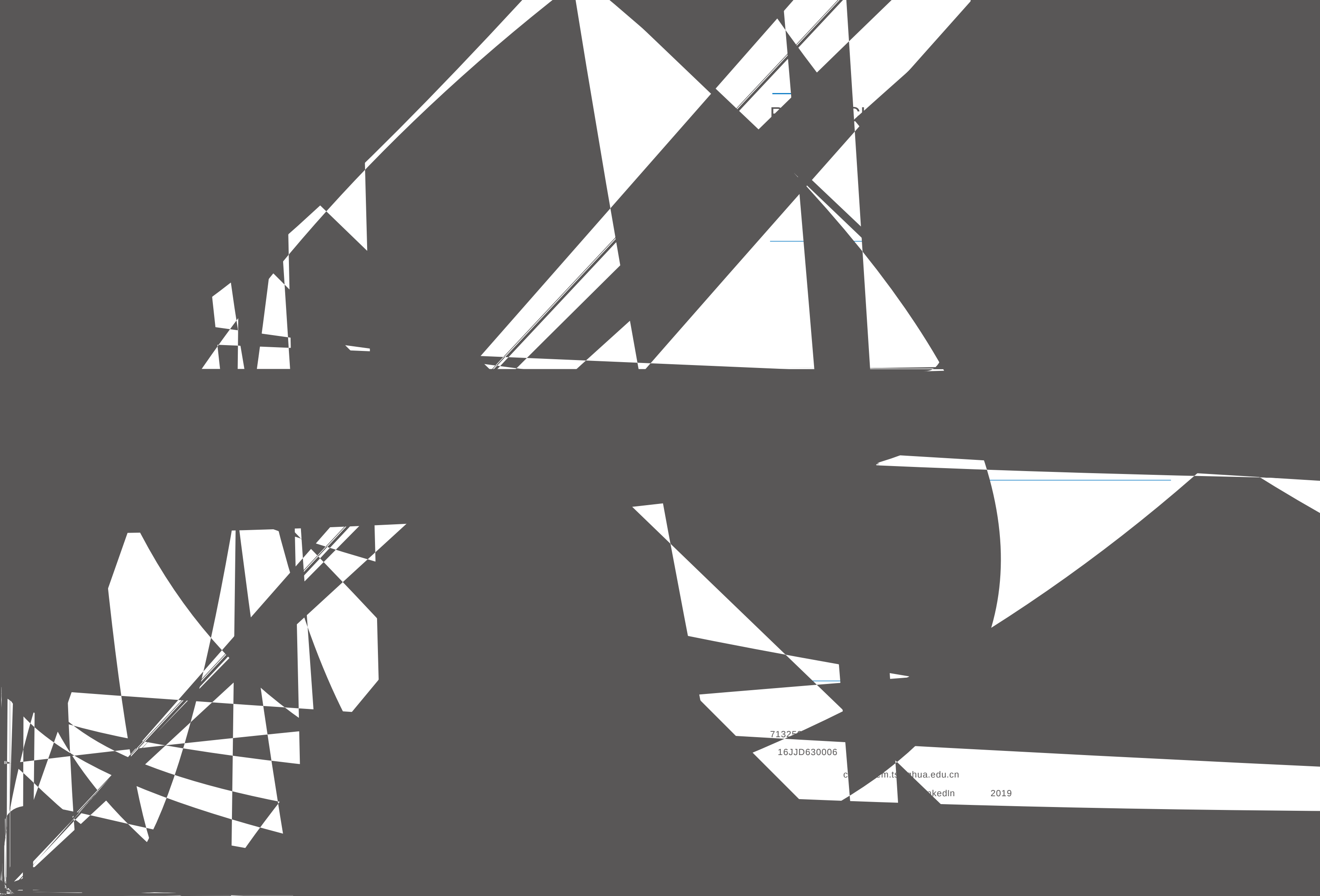


DIGITAL ECONOMY AND TALENT DEVELOPMENT
IN THE GUANGDONG-HONG KONG-MACAU GREATER BAY AREA





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2019

Key Findings

- 01

The labor force distribution in Guangdong-Hong Kong-Macau Greater Bay Area (“Bay Area”) is more strongly concentrated to the east of the Pearl River, with Shenzhen, Hong Kong and Guangzhou as the three core cities. Between 2016 and 2017, among the cities to the west of the Pearl River, only Zhuhai showed an upward trend of labor force growth.
- 02

In the manufacturing sector, the Guangdong-Hong Kong-Macau Greater Bay Area has the highest proportion of the national labor force, at more than 40%. In comparison to the rest of the country, the advantaged sectors in the Bay Area include manufacturing, wholesale and retail, transportation, storage and postage, real estate, leasing and business services, information transmission, software and information services.
- 03

In the Bay Area, high level talents and digital talnts are mostly concentrated in Shenzhen, Guangzhou and Hong Kong, among which Shenzhen ranks frst. The average level of digitization of the talents in the Bay Area is 26.98%, and in Shenzhen is more than 30%, which is leading other cities.
- 04

The Bay Area has the highest proportion of high level talents in manufacturing, consumer goods and ICT industries, all exceeding 10%. In terms of digital talents within industry, the degree of digitization of the ICT industry is more than 80%, and the development level of the basic digital economy is relatively higher. Meanwhile, the degree of digitization of traditional dominant industries such as manufacturing, retail, fnancial services is relatively low, and the development level of integrated digital economy needs to be improved.
- 05

Talents in the Bay Area are diverse when it comes to educational background -- more than 25% of which have studied abroad; over 30% of which have master's or doctoral degrees.They are majored in economics and management related felds including business management, economics, fnancial services, etc., among which ICT-relevant specialties such as computer science ranks high. And they possess general-purpose skills such as project management and leadership, with a relatively low level of integration with digital skills.
- 06

Cities in the Bay Area show distinctive characters in terms of industrial development. Guangzhou features the most balanced talent distribution among industries; Shenzhen has outstanding advantages in ICT-relevant talent; Hong Kong boasts remarkable advantages in financial and educational talent; Macau focuses on the tourism and vacation industry; the other four cities in Guangdong province possess talents mostly in manufacturing and consumer goods.
- 07

The Bay Area is characterized by net infow among the spectrum of overall labor force, high level talent and digital talent. Shenzhen is much more attractive to talent than the other cities in the Bay Area, where it becomes the center of talent aggregation, especially it highlights the core role that Shenzhen is playing in terms of attraction to digital talent.
- 08

Compared with other Chinese cities as hubs of digital economy, such as Beijing and Wuhan, cities in the Bay Area are much more attractive to digital talent. The level of attraction is similar to Shanghai and Chengdu but it's far behind Hangzhou in this aspect.
- 09

The Bay Area has a large number of talents in regionally signifcant areas. Researchers mostly work for tech innovation-oriented frms; people with digital expertise tend to be in basic ICT-relevant areas. But there are relatively smaller numbers of university-based researchers and entrepreneurs. And local talent shows a rather simple pattern of international connections.
- 10

Compared with San Francisco Bay Area and Sydney, the Bay Area features a group of talent who are younger but not excessively young, with capabilities and potential of development.

CONTENTS

01

1

INTRODUCTION

04

30

TALENT MIGRATION IN THE
GUANGDONG-HONG KONG-MACAU
GREATER BAY AREA

4.1	32
4.2	34
4.3	37

02

2

DIGITAL ECONOMY DEVELOPMENT
IN THE GUANGDONG-HONG
KONG-MACAU GREATER BAY AREA

2.1	3
2.2	10

05

42

BAY AREA TALENT BENCHMARK

5.1	43
5.2	44
5.3	46

03

12

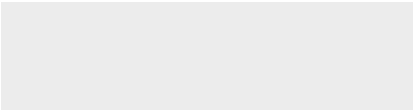
EMPLOYMENT STATUS OF THE
GUANGDONG-HONG KONG-MACAU
GREATER BAY AREA

3.1	13
3.2	17

06

47

SUMMARY AND SUGGESTIONS



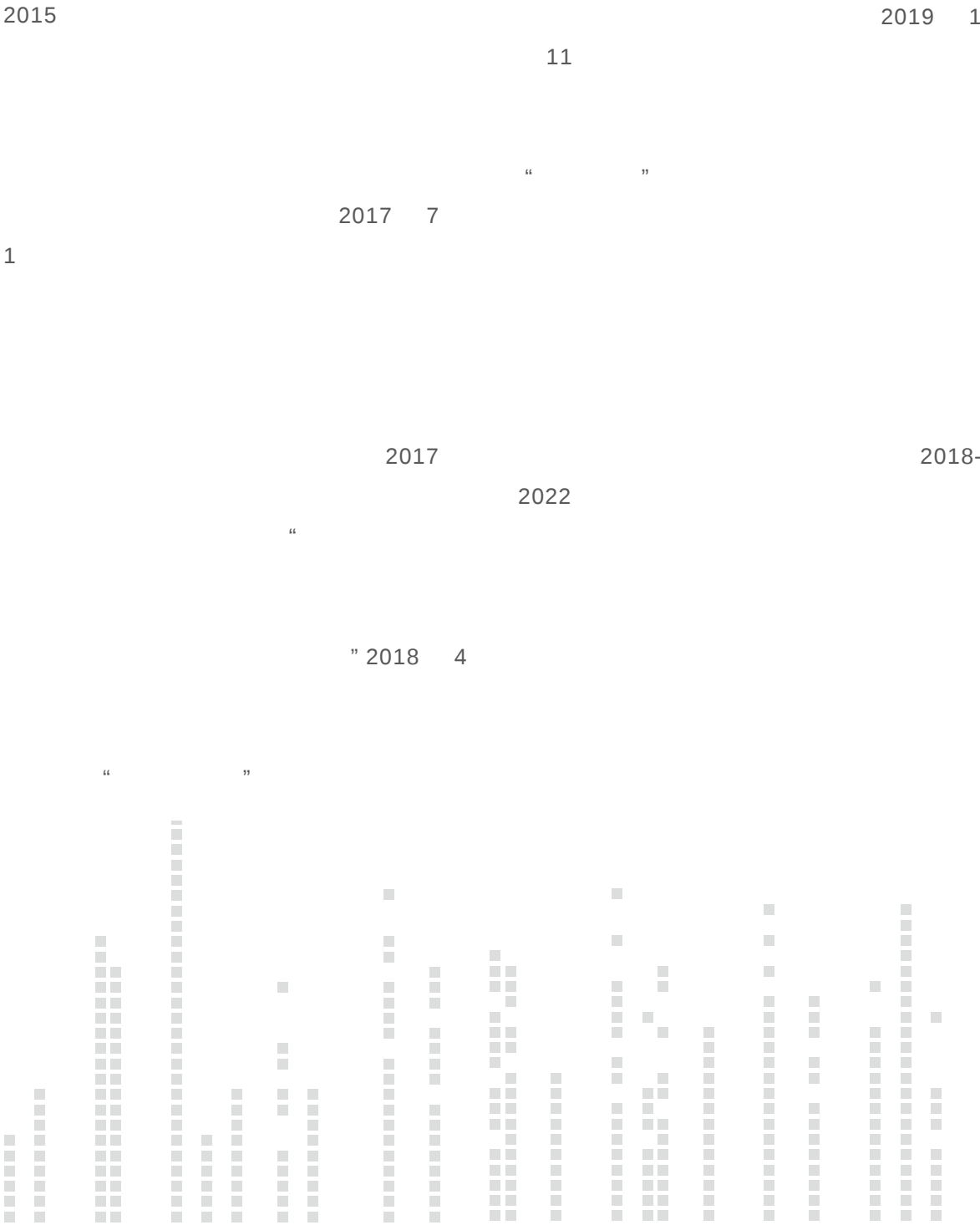


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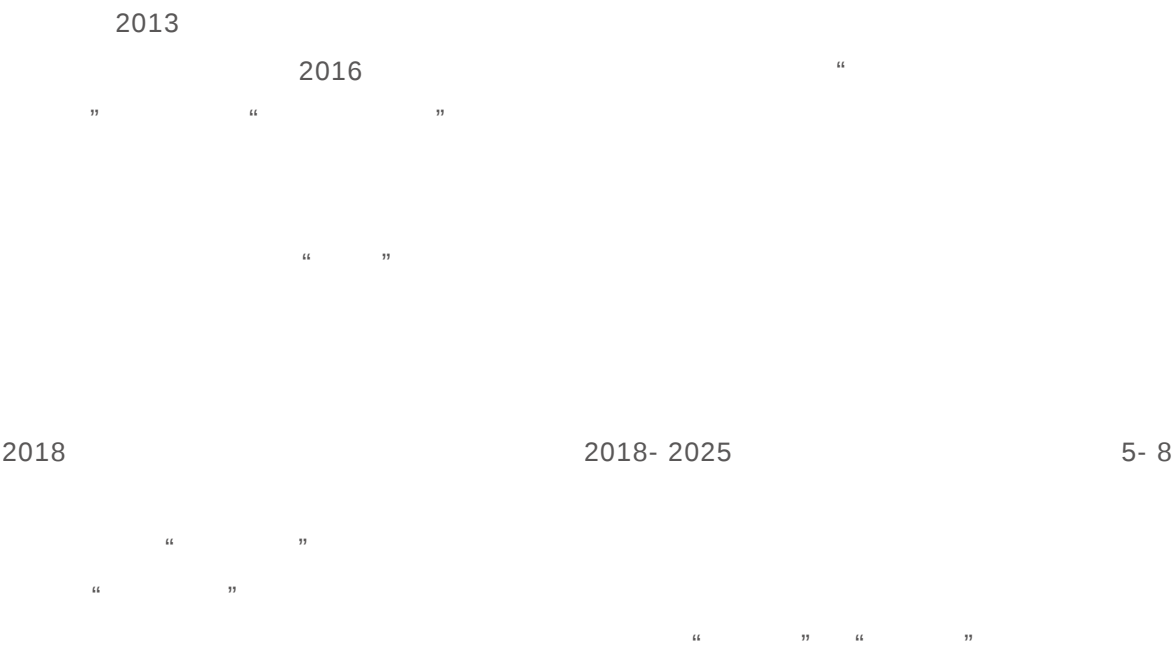
DIGITAL ECONOMY DEVELOPMENT IN THE GUANGDONG-HONG KONG-MACAU GREATER BAY AREA

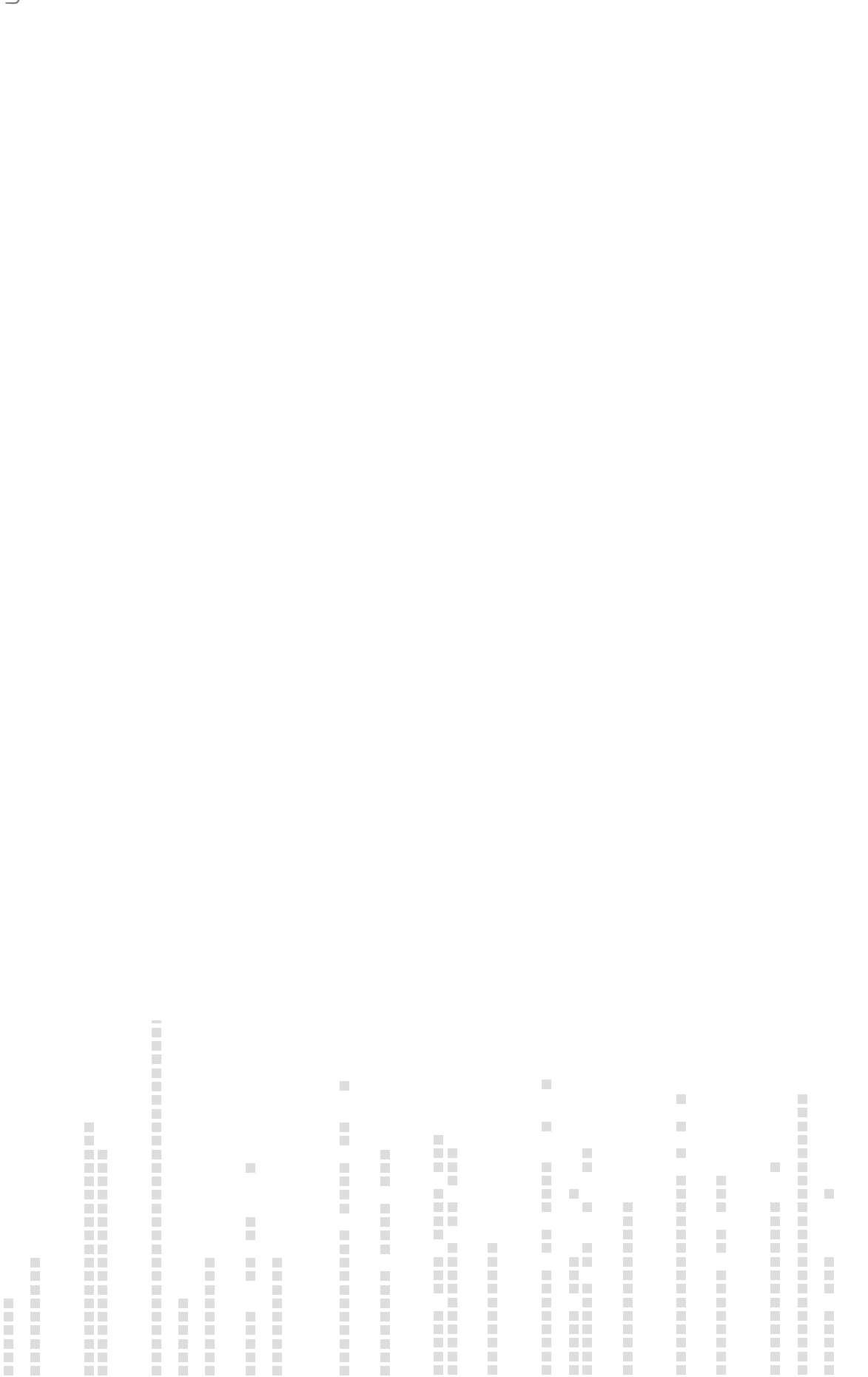
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2.1.1



2.1.2





2.2

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2016

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30%

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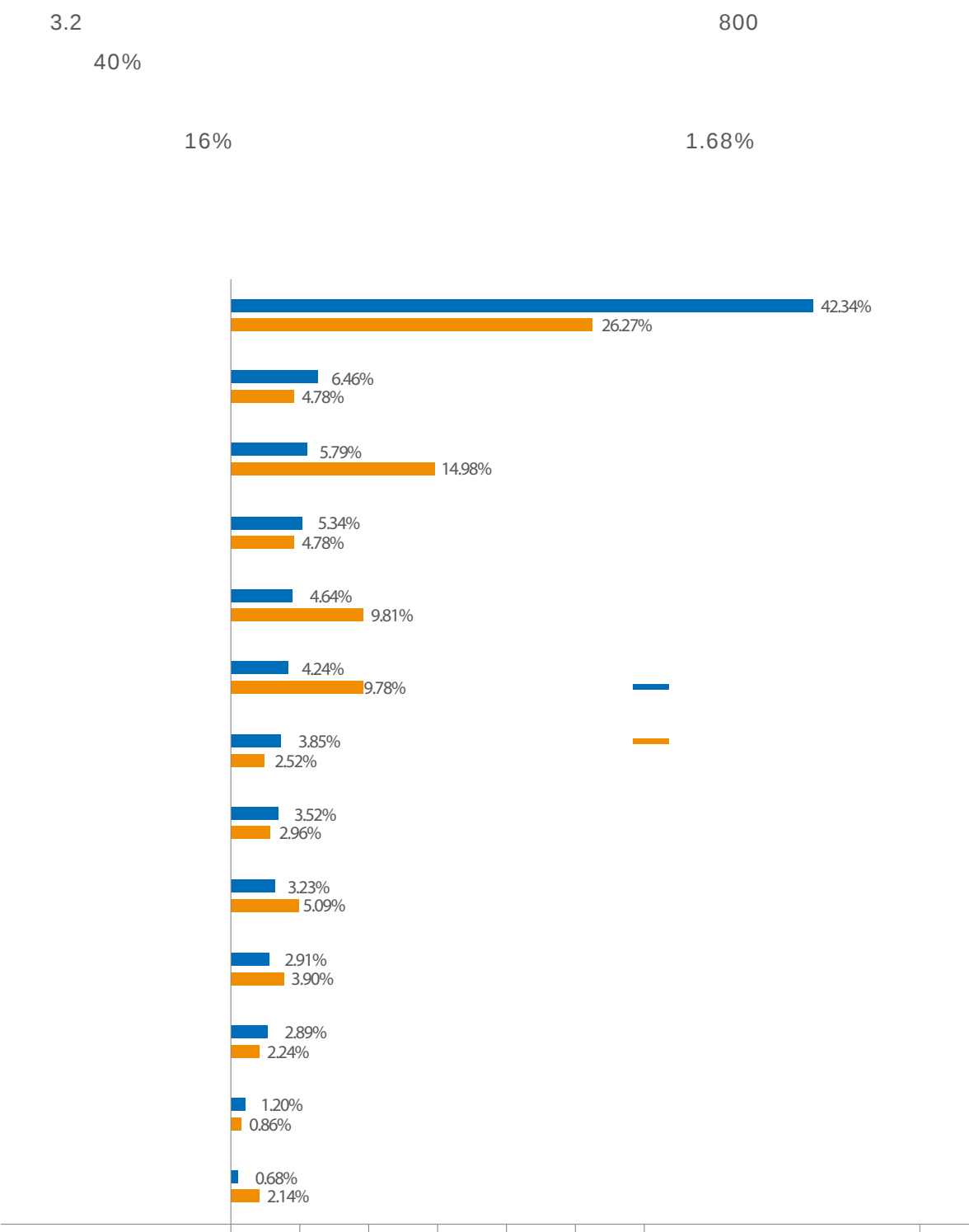
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803

2017 8

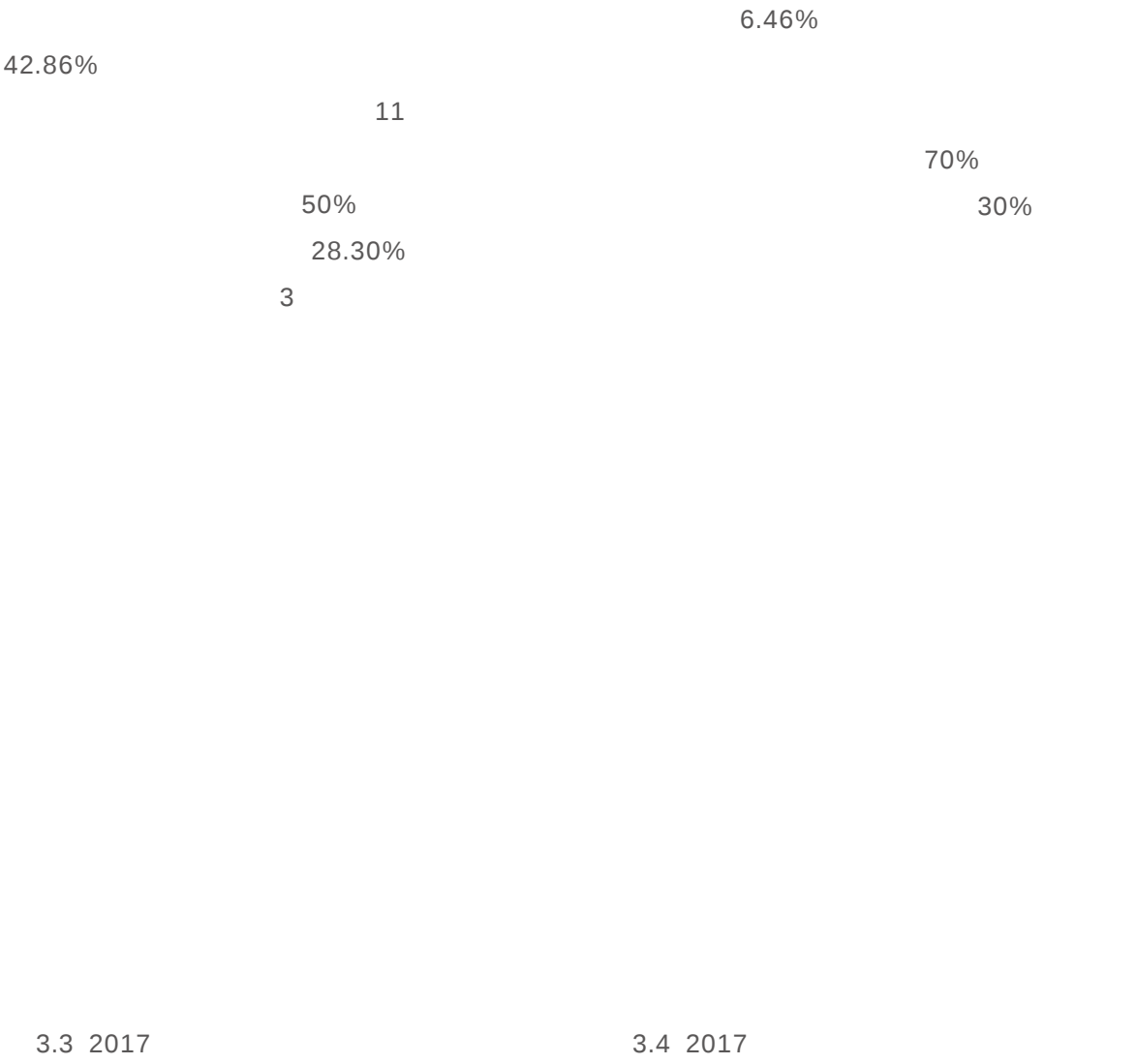
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3.2 2017

3.1.2



3.3 2017

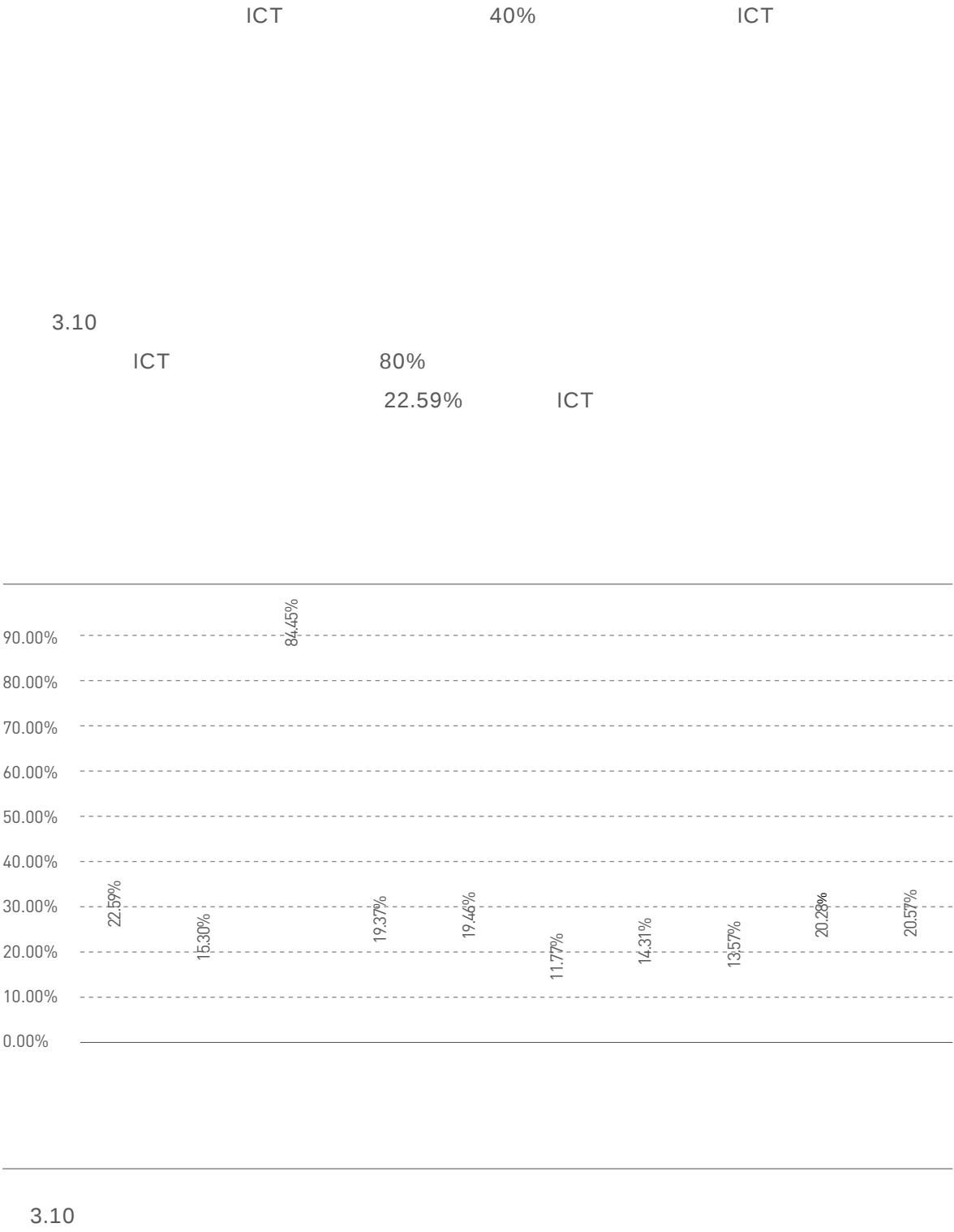
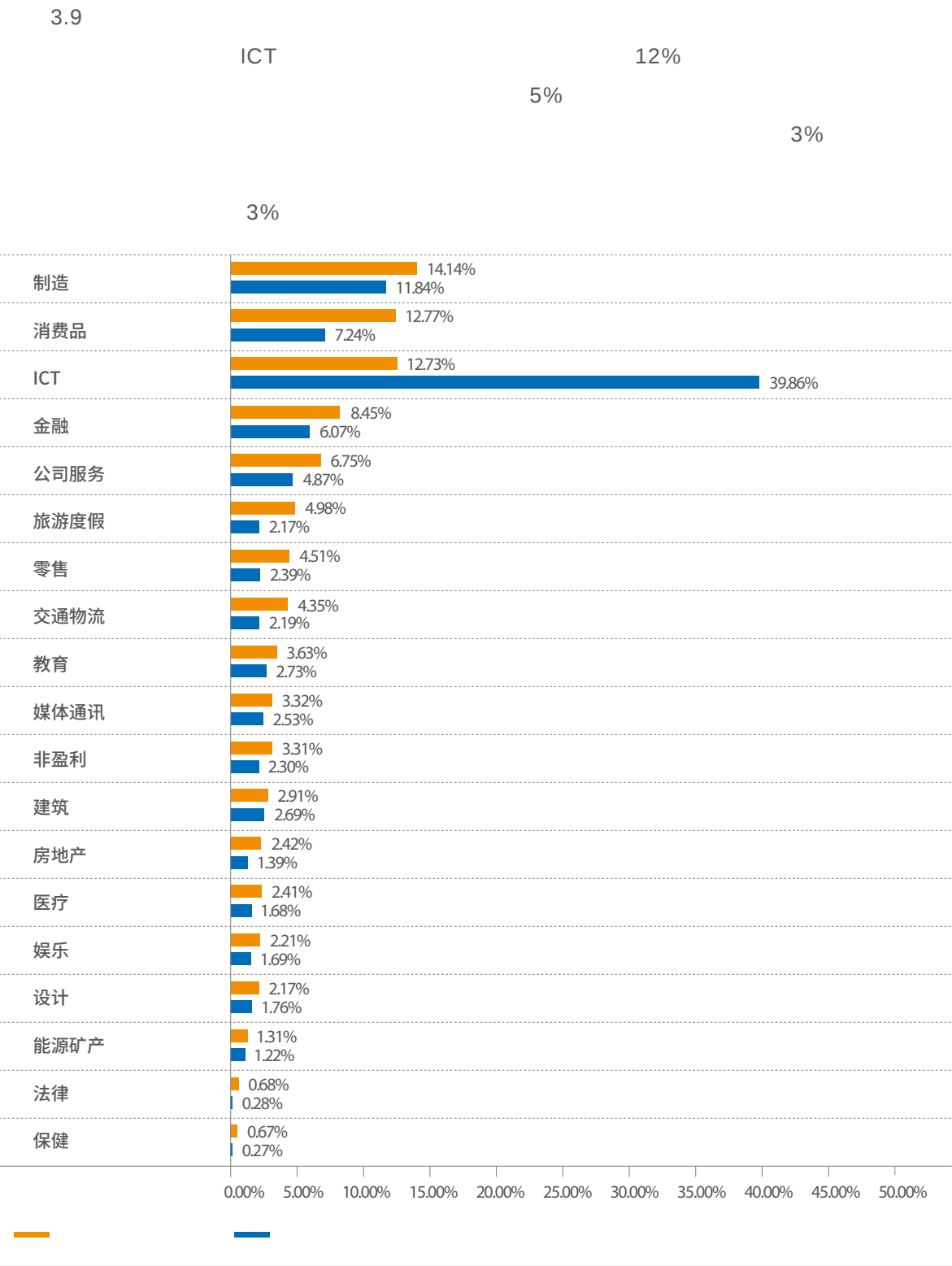
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46.60%
17.06%
12.94%

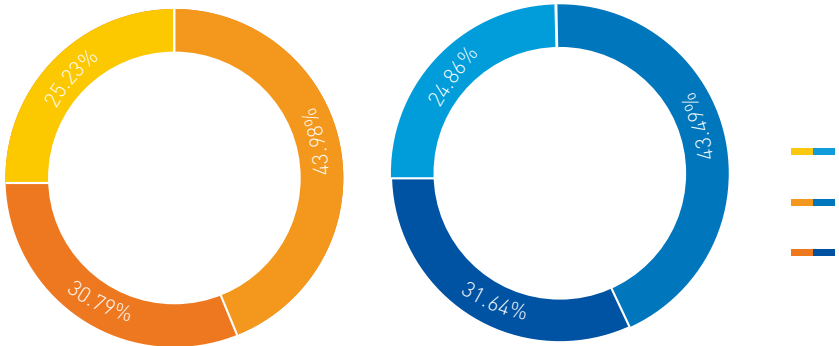
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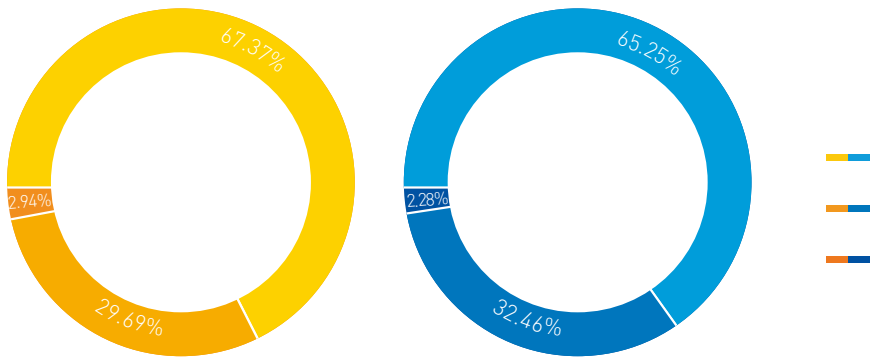
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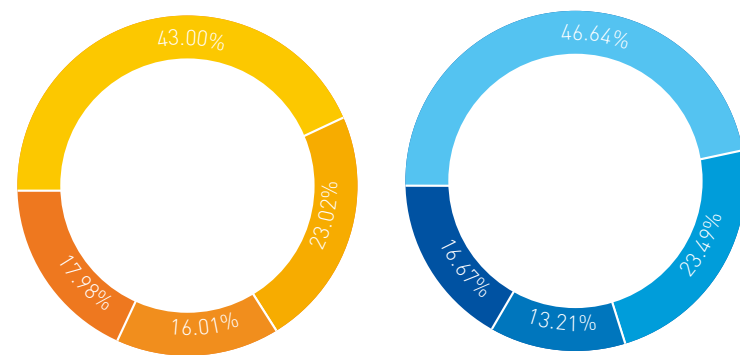
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3.12
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3.12

3.2



3.4

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3.5

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9					Java	
10						

3.6

Photoshop

ICT

3.6

1	Photoshop [20]	[27]	[18]	[15]	Java [9]	[25]
2	[42]	[38]	[24]	[29]	SQL [13]	Linux [29]
3	[74]	Photoshop [40]	SQL [45]	Photoshop [33]	[14]	Java [30]
4	[77]	SQL [91]	VBA [52]	[40]	JavaScript [16]	IP [32]
5	SAP [96]	Java [97]	Java [55]	[57]	[18]	[35]
6	[99]	VBA [109]	Photoshop [62]	[69]	Photoshop [20]	C++ [37]
7	Windows [114]	[112]	C++ [78]	SAP [73]	[21]	[39]
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9	ERP [130]	HTML [127]	SDLC [95]	C++ [92]	[24]	[44]
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3.7

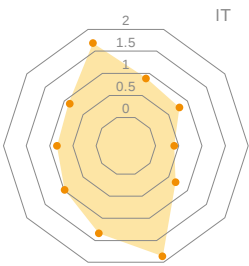
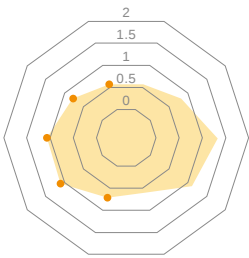
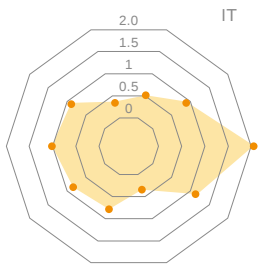
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Worksheet: 1

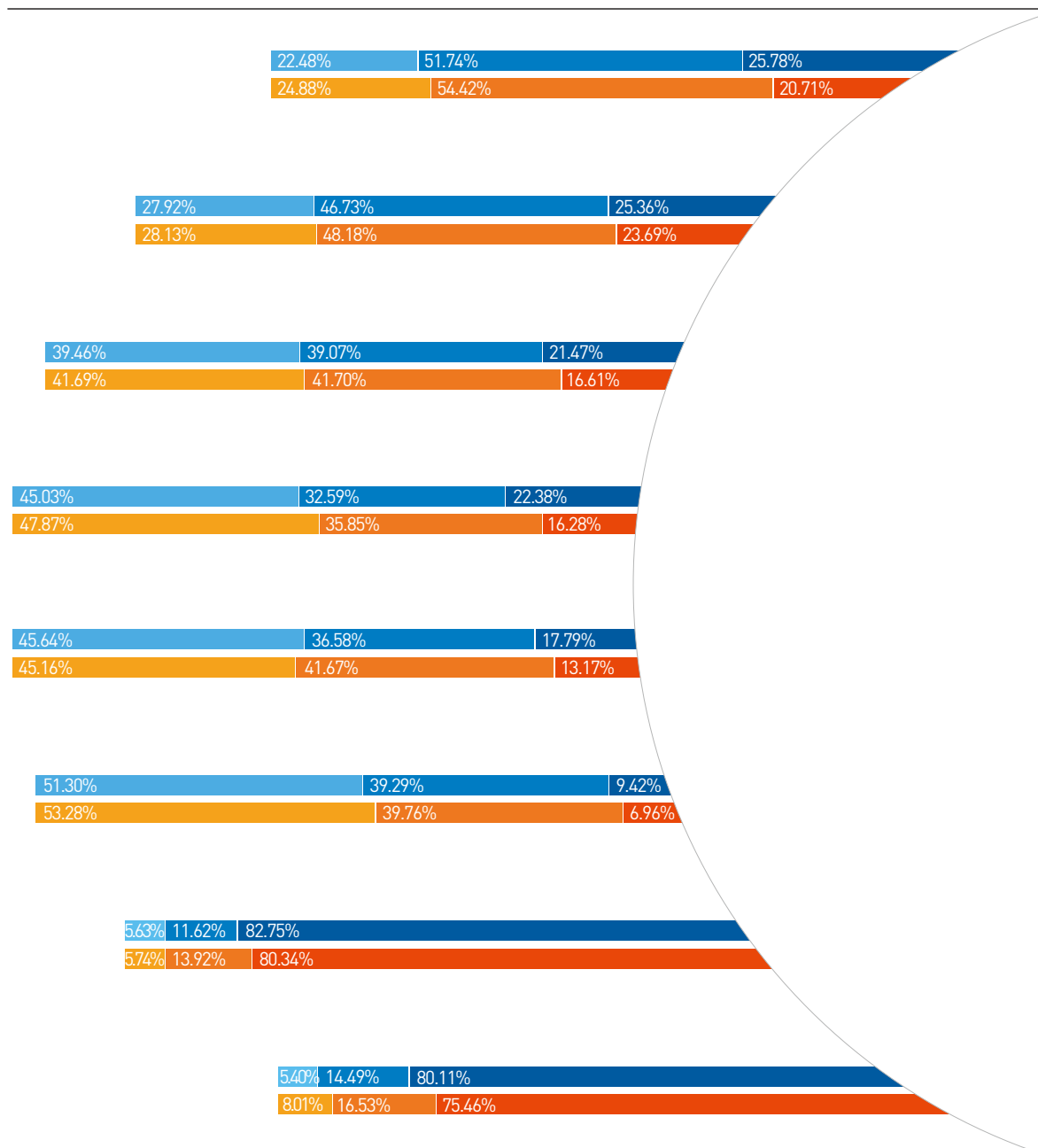
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IT
ICT IT



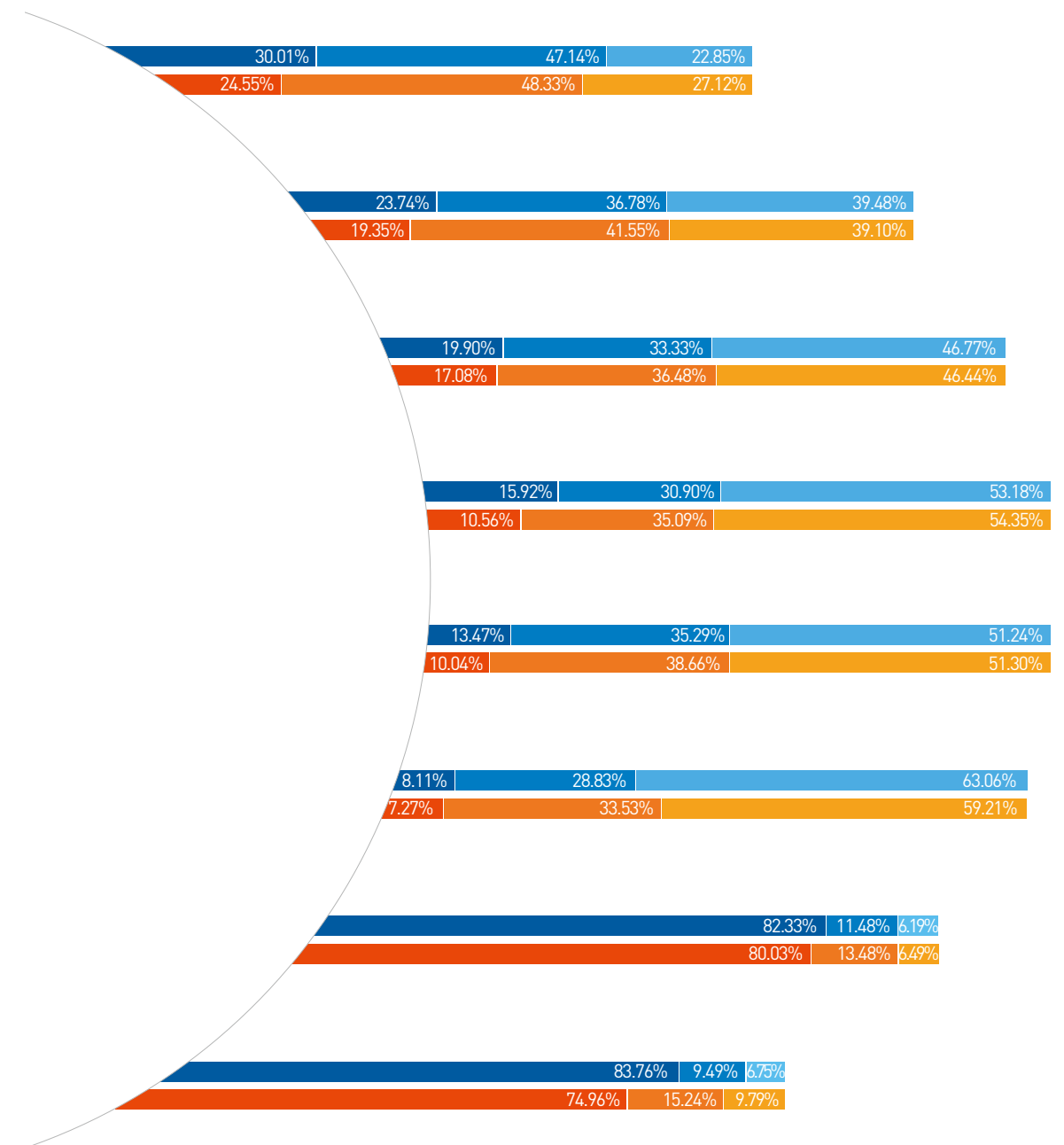
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04

TALENT MIGRATION IN THE GUANGDONG-HONG KONG-MACAU
GREATER BAY AREA

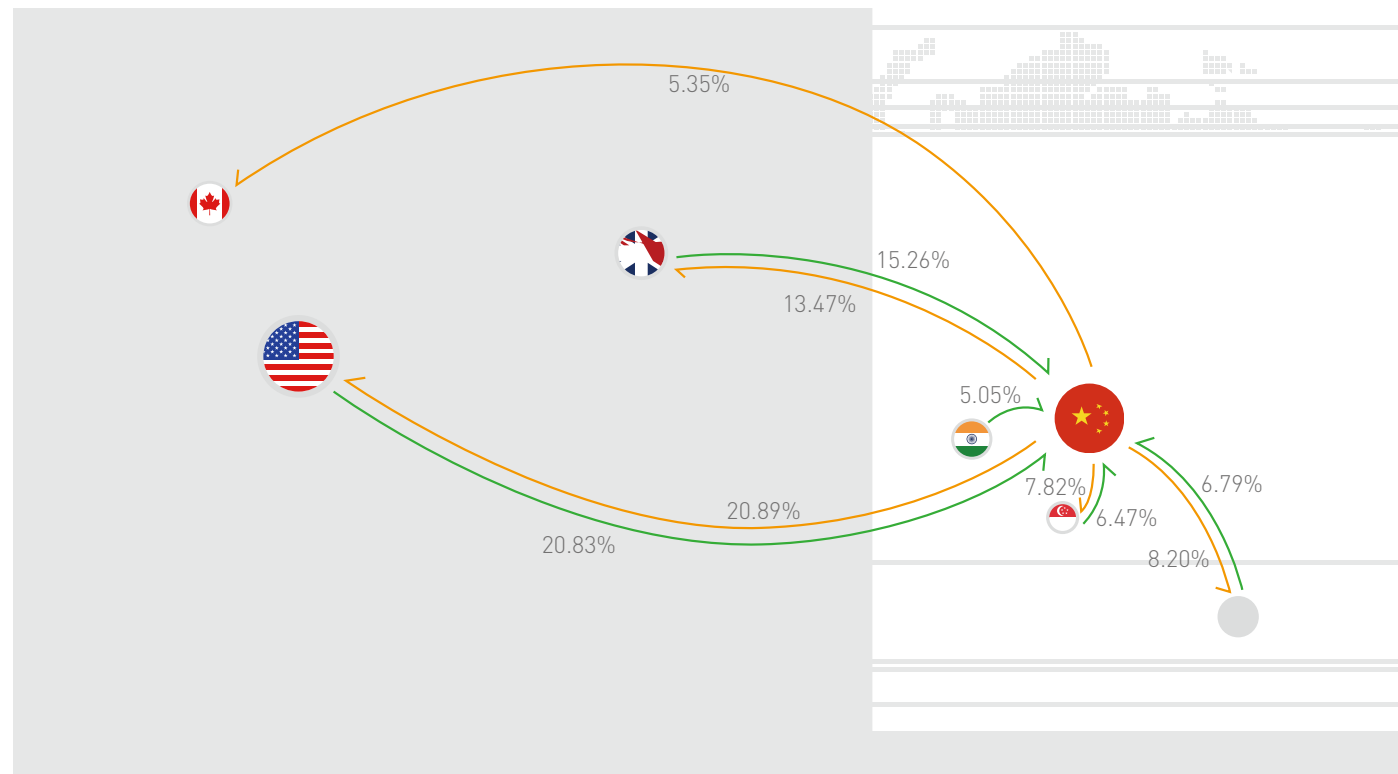
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4.1 4.2

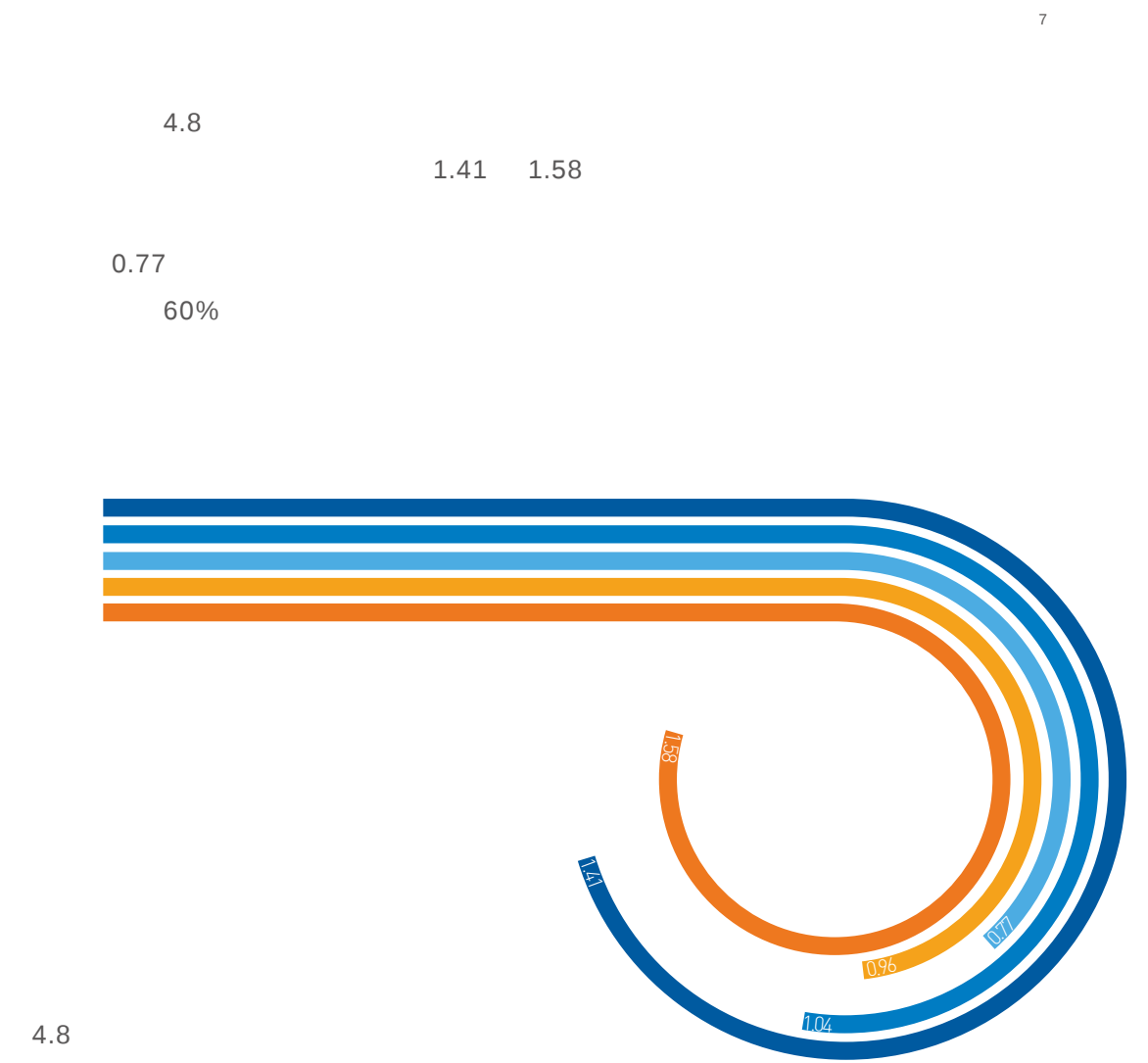


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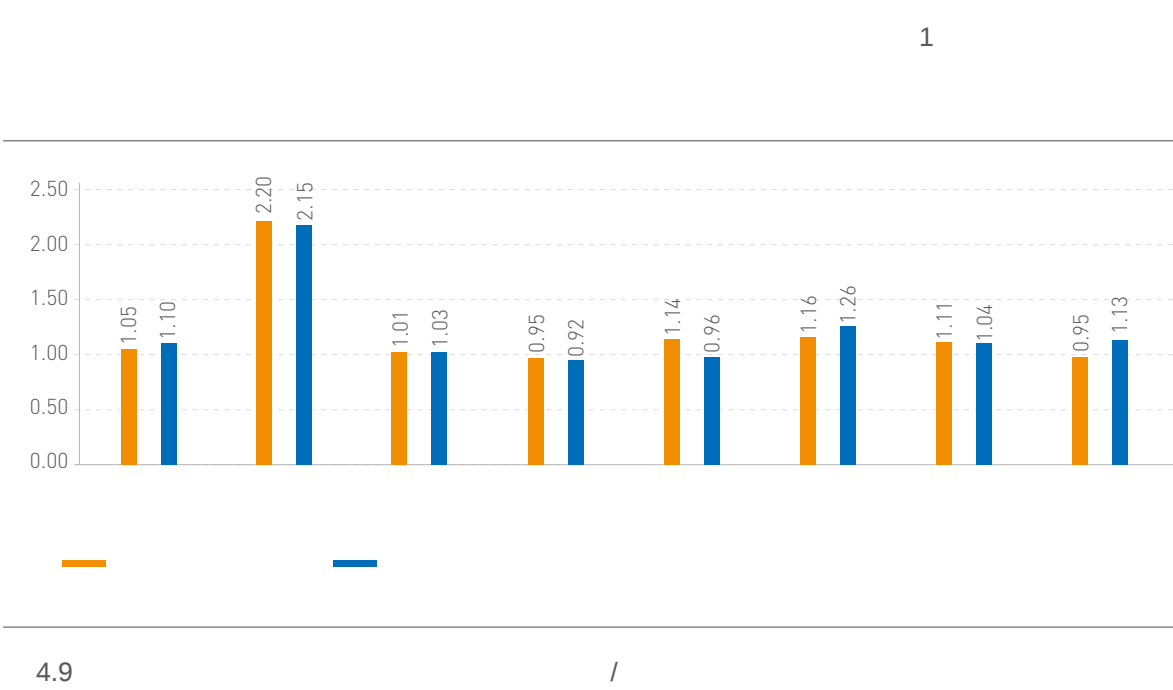
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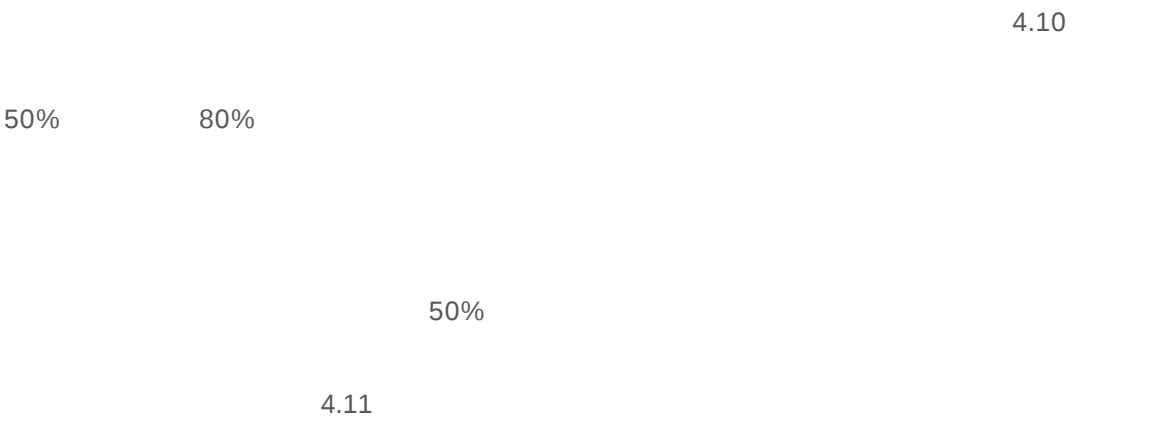


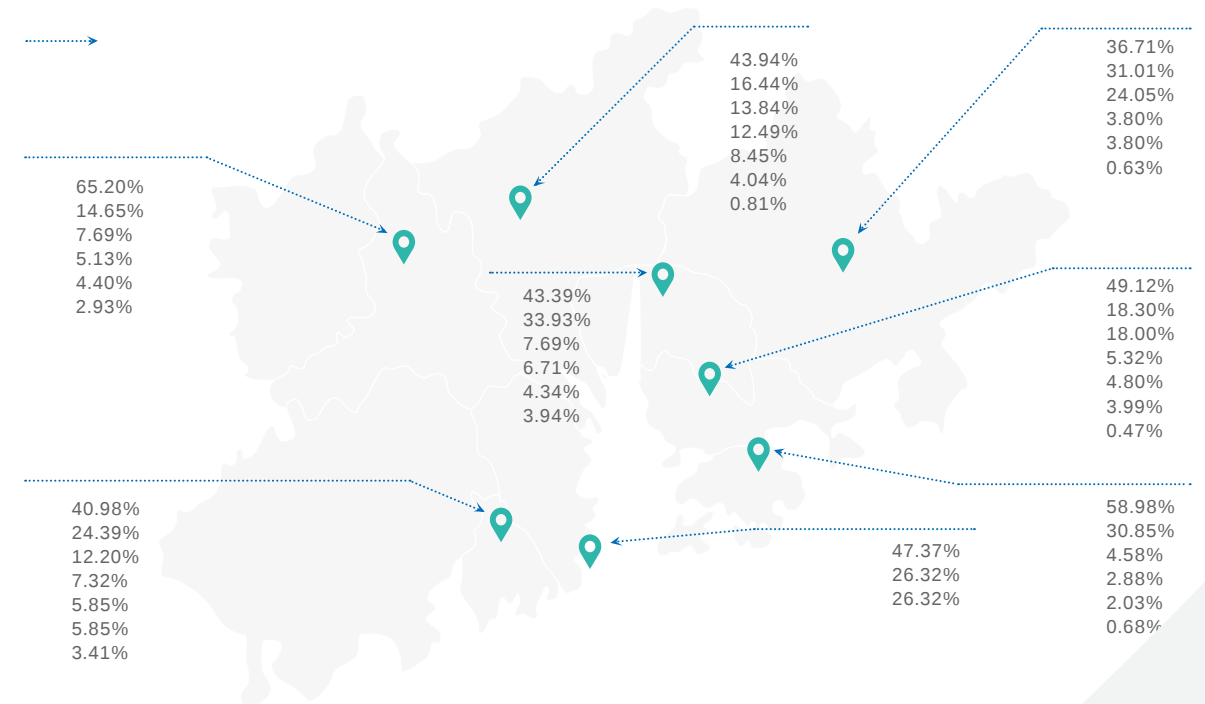
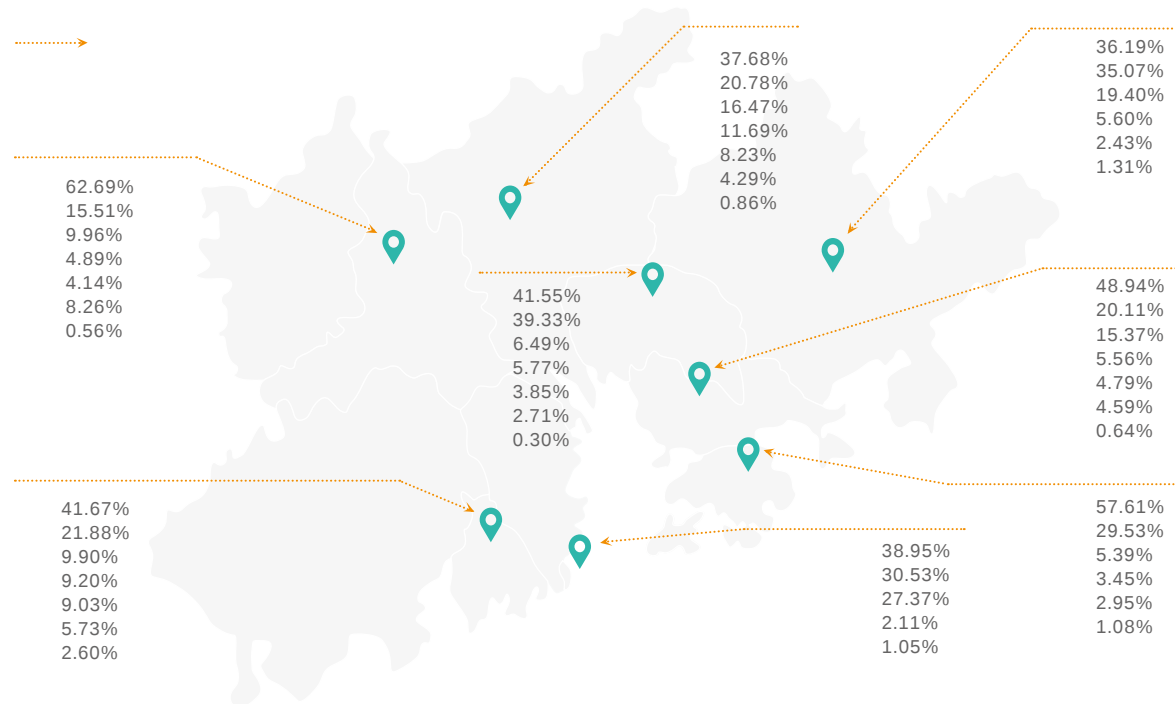
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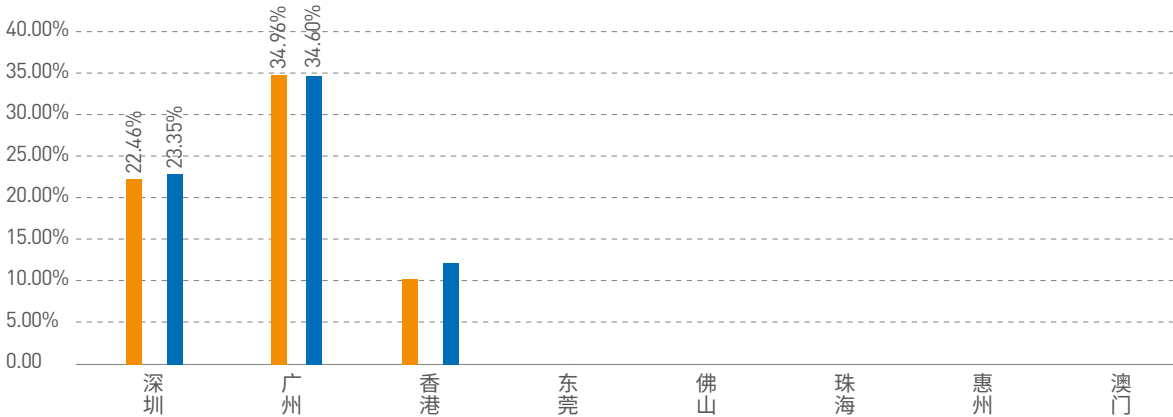
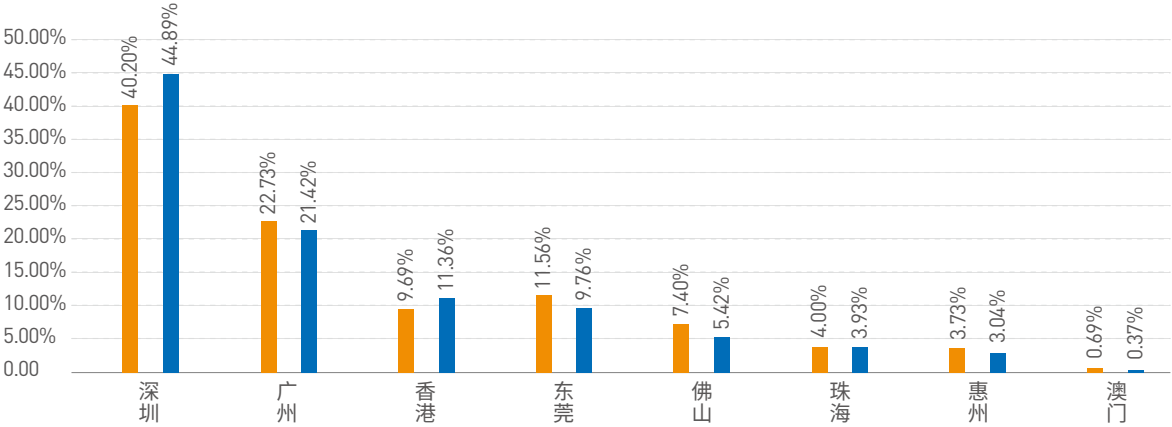
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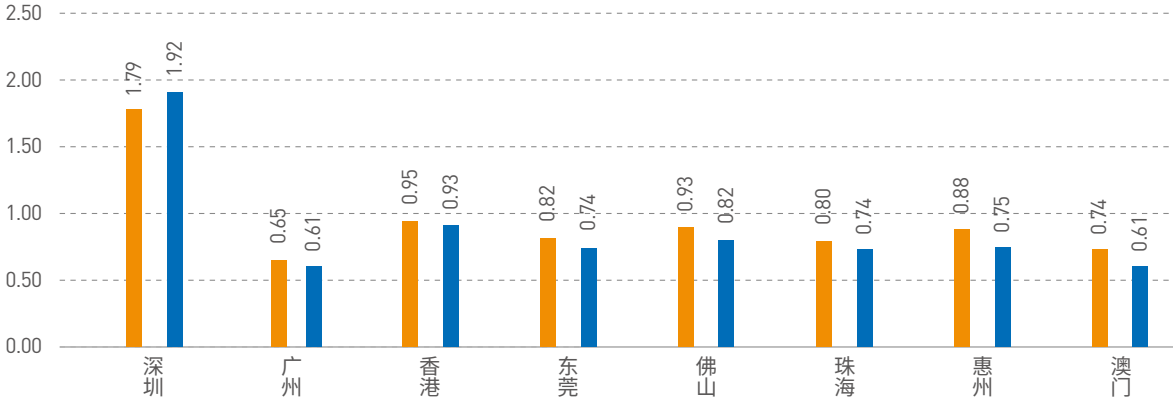
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4.3.3

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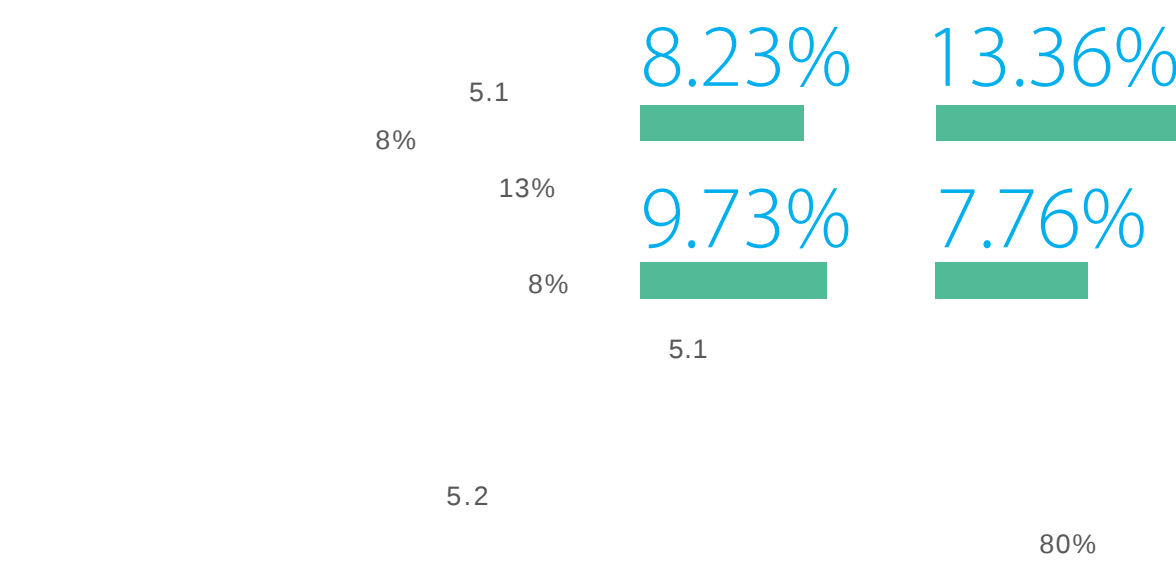
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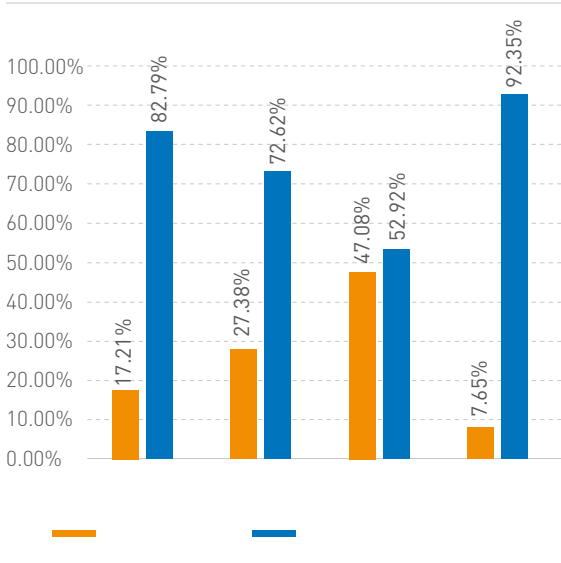
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BAY AREA TALENT BENCHMARK

5.1



90%



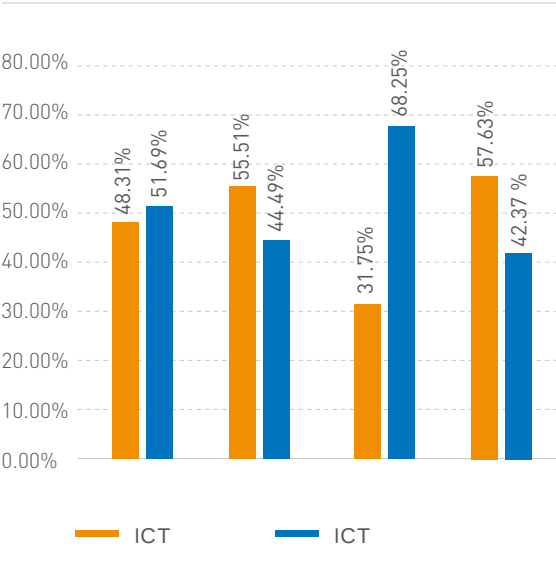
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ICT

ICT

ICT

5.3



5.3

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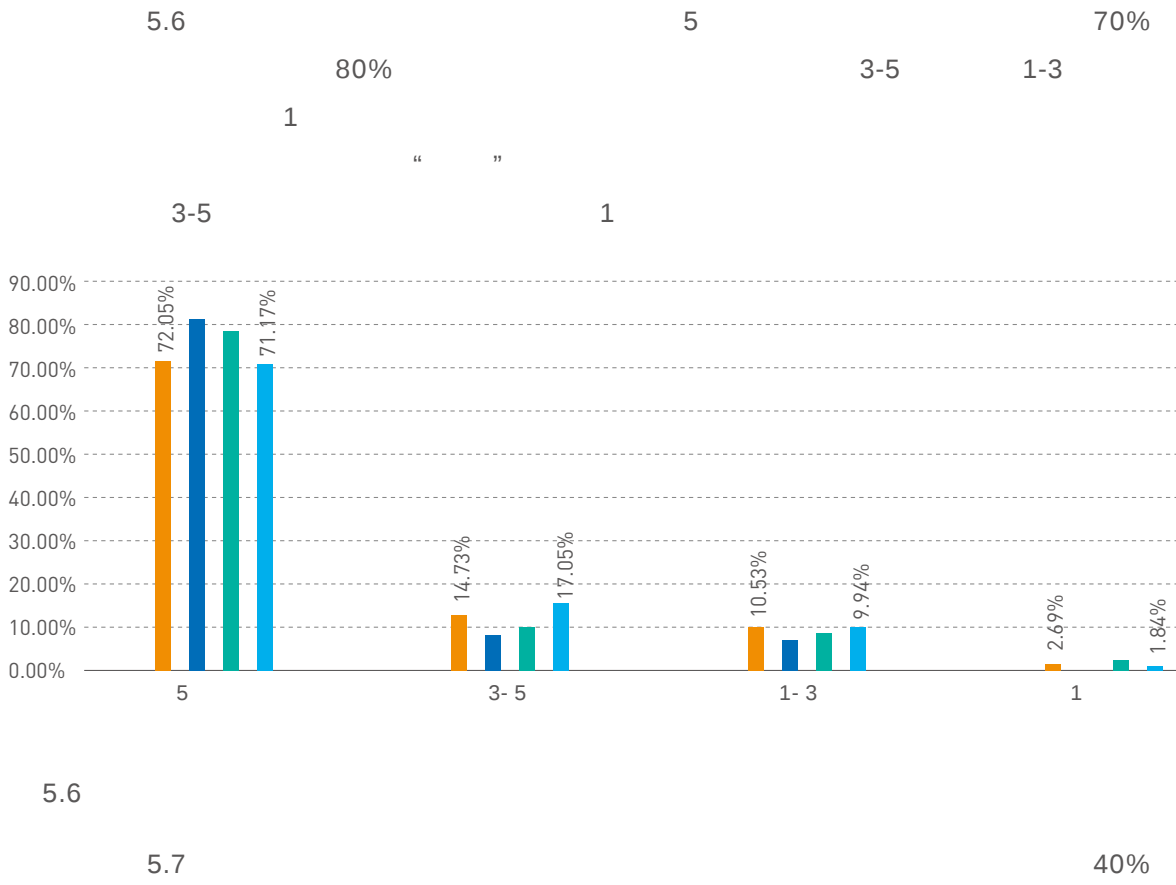
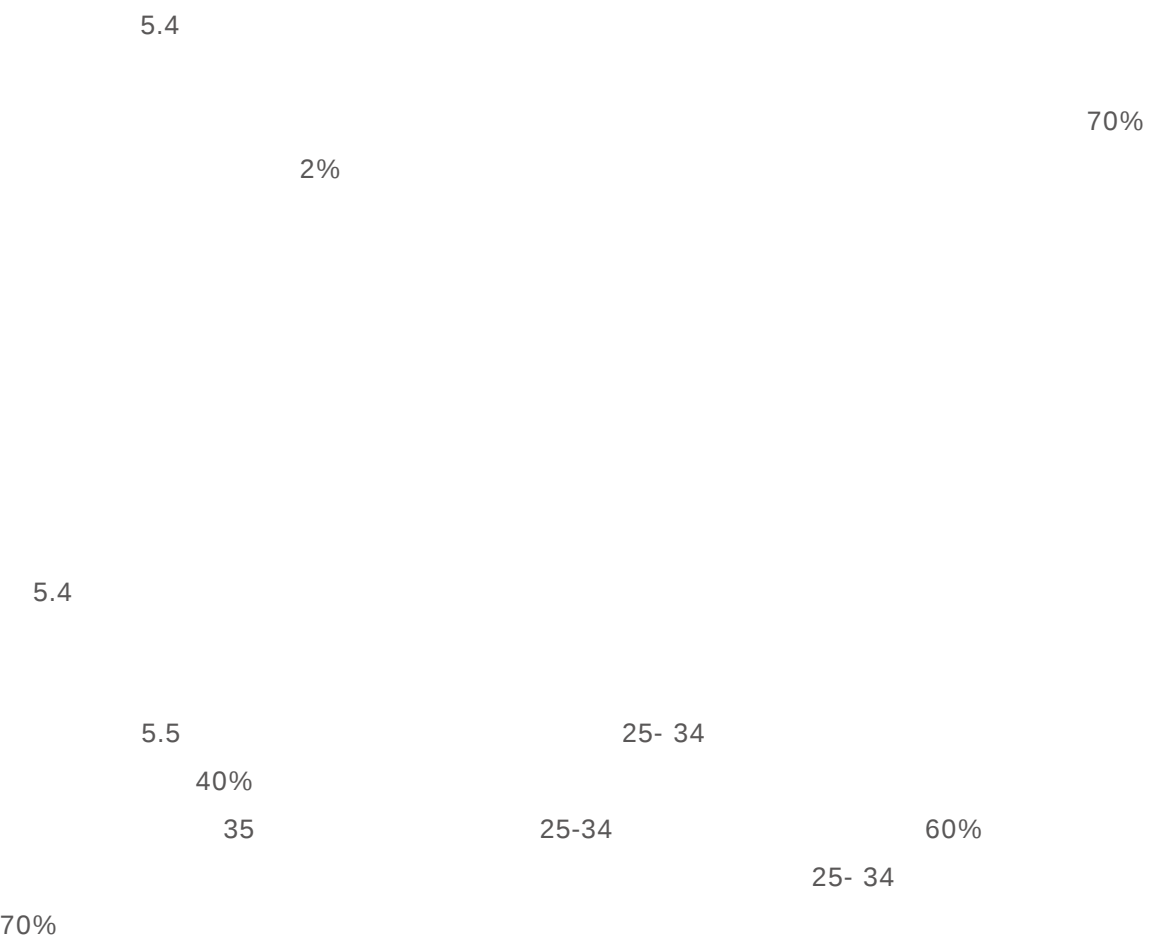
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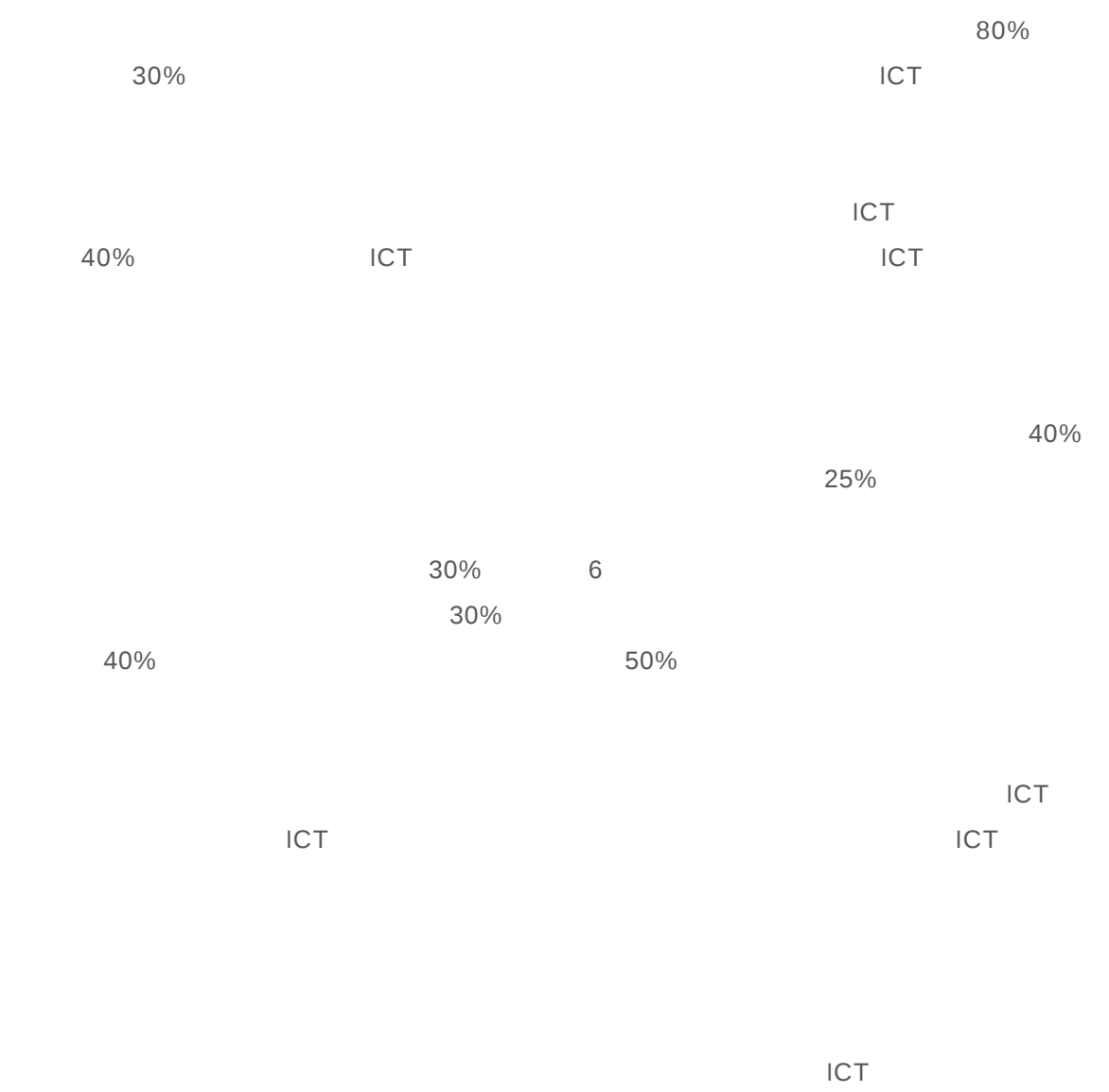


5.1

1		25.65%		16.86%		20.83%		66.74%
2		7.41%		16.32%		15.26%		9.39%
3		7.19%		9.12%		6.79%		8.76%
4		5.65%		3.91%		6.47%		8.65%
5		3.87%		3.84%		5.05%		6.46%

5.2







Development and Governance, CIDG Tsinghua SEM Center for Internet
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