

Research Brief

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Challenges and economic impacts arising from Coronavirus Disease 2019

December 2020

Almost a year has passed, the COVID-19 situation in Hong Kong remains challenging as the fourth wave of outbreak continues to rage on. Although the Government has strengthened the anti-epidemic efforts on various aspects, cases without known sources have been growing fast recently. In Singapore, to encourage early medical attention and reduce risk of community transmission, it has extended the efforts by for example subsidizing consultation and treatment fee for patients with respiratory infection, and issuing them a medical certificate requiring them staying at home unless their test result is negative.

On economic front, the largest two pillar industries are relatively more resilient but tourism has inevitably collapsed like many parts of the world. Some overseas places like Japan, Singapore and the United Kingdom have continued to support the hardest-hit sectors with wage subsidies, and worked out measures to facilitate job redeployment, job matching and/or job creation.

In the absence of effective treatment or vaccines, every place is struggling to strike a balance between resumption of social activities and infection control under the "new normal". Singapore has made it compulsory for a range businesses and premises including hotels, education institutes and events to put in place a visitor check-in system, while requiring visitors to log their records with a contact tracing app or token. With tourism coming to a standstill, many Asian places (e.g. Japan and South Korea) have also sought to encourage local consumption by issuing discount vouchers for residents to spend in vulnerable services segments.

The subject of COVID-19 challenges and economic impacts is within various policy areas, including the Panel on Health Services, Panel on Economic Development, Panel on Commerce and Industry, and Panel on Manpower.

1. Outbreak of Coronavirus Disease 2019

1.1 The outbreak of Coronavirus Disease 2019 ("COVID-19") since the early 2020 has posed extraordinary challenges in almost every part of the world. This highly contagious disease has caused over 66 million cases of infection and over 1.5 million deaths globally.¹ Since the beginning of the year, Hong Kong has recorded over 7 000 cases of infection and over 110 deaths. The public health crisis has deeply plagued Hong Kong's economy. In the first half of the year, it has suffered the largest decline on record. The Government has unprecedentedly rolled out three rounds of relief measures to save the economy, involving some HK\$191.5 billion. This is in addition to the HK\$120 billion relief package under 2020-2021 Budget.

¹ See WHO (2020a).

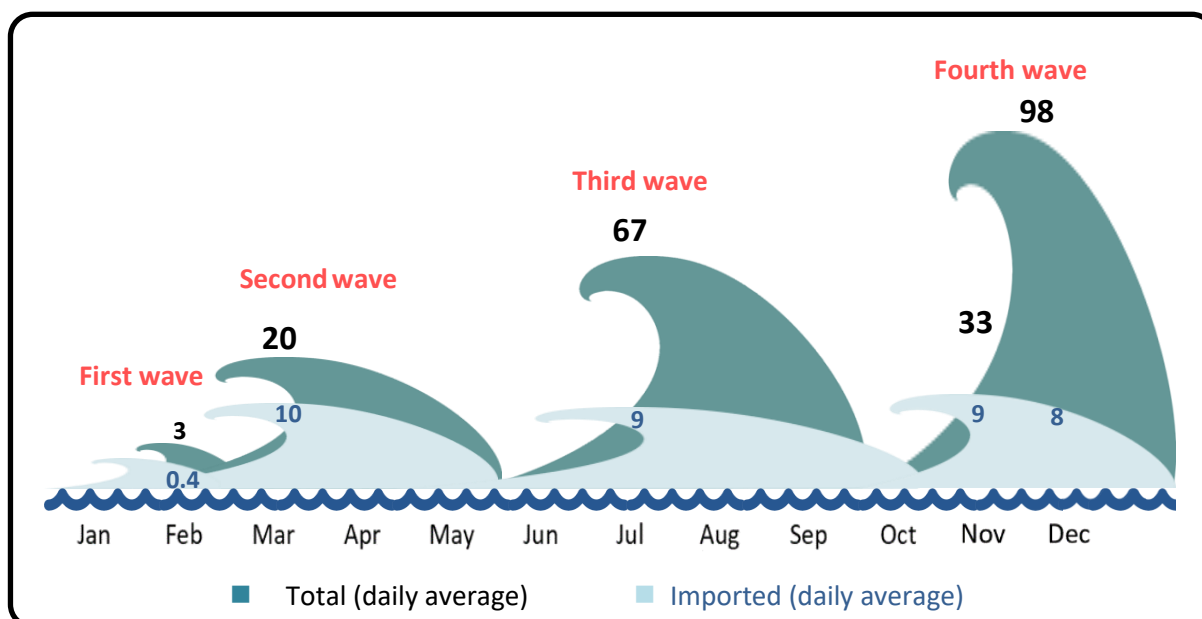
1.2 Though the infection situation had stabilized a bit in the past two months, the recent situation has intensified and raised alarm again. According to the World Health Organization, the fight against COVID-19 is far from over and everyone is at risk of infection until there is an effective vaccine or treatment. Hence, there remain numerous challenges to be addressed, both on **COVID-19 control** and **economic** fronts under this "new normal".

Situation of COVID-19 infection in Hong Kong

1.3 Hong Kong recorded the first COVID-19 case on 23 January 2020. Within a month, confirmed cases have grown drastically to over 70. To respond to the COVID-19 outbreak, the Government for the first time ever imposed cross-boundary epidemic control with a raft of social distancing measures in February 2020, such as suspension of classes and work-from-home arrangement for civil servants. Other key control measures under its containment strategy include testing, contact tracing, and provision of quarantine and isolation facilities, with a view to achieving "**early identification, early isolation and early treatment of the infected**".

1.4 As at end-November 2020, there were about 840 infected cases per a million population in Hong Kong. Compared to the global figure of over 7 500, Hong Kong is not among the most worrying places. Yet the city has seen ups and downs in battling the virus. Since the beginning of the year, there have been so-called **four waves of outbreak (Figure 1)**. Since December, average daily new cases have risen to 98, with less than 10% being imported cases. Probably because of their more active social activities, those **aged 15-39** represented 35% of the confirmed cases, higher than the corresponding population share of 31% (**Figure 2**). While those aged 80 and above just accounted for only 4% of the cases, the disease has particularly threatened them. Almost **23%** of infected persons in this age group have died, significantly higher than the overall average of 2%.

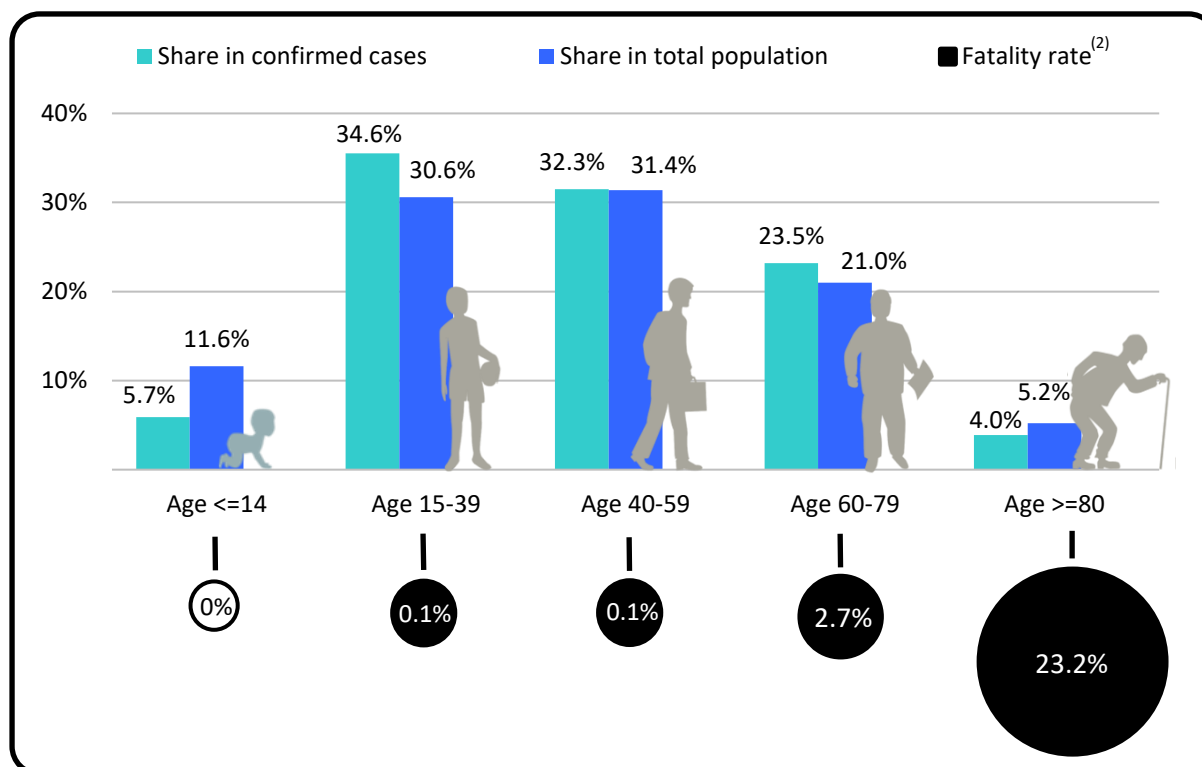
Figure 1 — Four waves of COVID-19 outbreak⁽¹⁾ in 2020



Note: (1) Data from 23 January 2020 and as at 10 December 2020. Of all cases, one was a probable case and about 25% were imported cases.

Source: GovHK (2020f).

Figure 2 — Age distribution of confirmed and death cases⁽¹⁾



Notes: (1) Data, as at 10 December 2020, has excluded about 4% of cases of non-residents/unknown residency.

(2) Fatality rate indicates death cases as a share of infections.

Sources: GovHK (2020f) and Census and Statistics Department (2020a).

Impact and challenges on healthcare system

1.5 With fighting of COVID-19 pandemic becoming a new normal, infection management and readiness to respond to different situations are crucial, posing new challenges to the healthcare system. Effective testing, tracking and tracing ("TTT" strategy) is widely considered as a promising approach to bringing the epidemic under control without resorting to widespread lockdowns of social and economic life.² On **testing**, Hong Kong has conducted about 4.38 million viral tests as at 1 December 2020, of which 41% were under the Universal Community Testing Programme carried out in September 2020³, and 19% under the Targeted Group Testing Scheme carried out by private testing services suppliers.

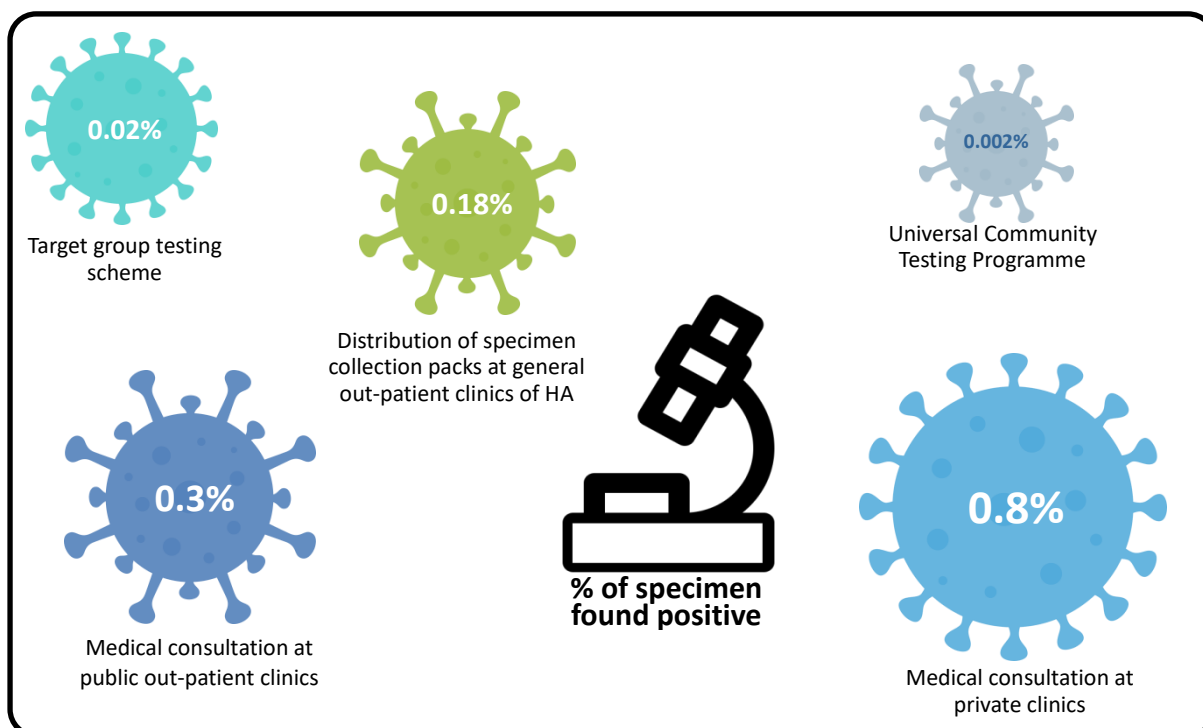
1.6 Since different testing strategies targeted different population groups, the likelihood of identifying infected persons also varied (**Figure 3**). For example, the positivity rates under testing of higher-risk groups and patients with symptoms were expectedly higher than that under universal testing, which was targeted at the healthy mass population aiming to find hidden carriers (i.e. asymptomatic and pre-symptomatic patients). As such, the Government and medical experts have kept advising members of the public to seek medical advice promptly when feeling unwell. Recently, the Government has amended regulation **mandating** specific groups of people exposing to higher infection risk (e.g. from certain premises or in certain occupations) to receive test, and authorizing registered medical doctors to order patients being suspected of COVID-19 infection to be tested.⁴

² Testing to identify who is infected can help suppression of infections; tracking infected people can make sure they do not spread the disease further; and effective contact tracing can help prevent resurgence of community transmission of the disease.

³ The Programme was under the support of the Central People's Government ("CPG"). CPG established a nucleic acid test support team involving some 570 professionals from the Mainland to enhance the testing capability of Hong Kong. See GovHK (2020k).

⁴ In addition to enhancing testing in the community, the Government has tightened the testing and isolation arrangement for persons exempted from compulsory quarantine (e.g. air crew and consular officers) when entering Hong Kong, including requiring a pre- and post-arrival test, and prohibiting the use of public transport during the exemption period.

Figure 3 — Testing strategies and positivity rates⁽¹⁾



Note: (1) Position as at 18 October 2020. See 食物及衛生局 (2020).

1.7 Despite the mandatory measures, there are still concerns whether patients with symptoms will delay or even refuse to seek medical advice, in particular those in fear of income loss once being found positive and hospitalized. To address this, the Government has offered to give HK\$5,000 to grassroots patients infected with the disease as a compassionate allowance.⁵ While this could partially help relieve the financial concern, it is noted that in **Singapore**, it has taken an alternative approach to encouraging early medical attention of the general public by providing consultation and treatment **subsidies** to those diagnosed with respiratory infections. The **subsidized rate** for residents is S\$10 (HK\$58) per visit⁶, available at 20 public clinics and over 900 participating private clinics.^{7, 8} As a precaution, it has

⁵ Though not subject to a means test, this ex-gratia payment is targeted at those who are not entitled to paid sickness days such as taxi drivers and casual workers.

⁶ Based on a 2013 survey conducted by the journal *Singapore Family Physician*, the median consultation charge per patient at general practitioner clinics was S\$20 (HK\$115). The median total fee per patient was S\$35 (HK\$201). See *The Singapore Family Physician* (2017).

⁷ These participating clinics account for over 50% of all private clinics run by general practitioners. They are given the "Public Health Preparedness Clinics" status.

⁸ More than 450 000 patients have benefitted from the subsidies and the amount of subsidies disbursed was around S\$31 million (HK\$178 million) as at June 2020. See Ministry of Health (2020e).

also provided guidance to doctors to issue a **medical certificate** not exceeding five days for patients with respiratory symptoms on the one hand, and on the other promulgated regulations to make it an **offence** for patients to leave home during the period, unless they are confirmed with a negative test result.⁹ To recognize the costs and efforts of the participating private clinics, they have been given a one-off **business grant** of S\$10,000 (HK\$57,500).¹⁰ Under its current testing policy, all individuals aged 13 and above diagnosed with acute respiratory infection at first presentation to a doctor at any participating private clinic will be given a COVID-19 test. Between 1 July 2020 and 16 August 2020, 76% of the patients aged 13 and above diagnosed with acute respiratory infection had received COVID-19 test, with about 0.03% of them tested positive. Patients who decline to be tested will remain issued a medical certificate, during which they are legally required to stay at home.¹¹

1.8 Apart from applying different testing strategies, early identification of infection also largely hinges on efficient **tracking and tracing**. To this end, Hong Kong has newly released a new notification mobile application ("app") "LeaveHomeSafe", and has made it mandatory for deployment in certain places like entertainment and food premises. By scanning the QR code displayed at a business venue, users will be notified when infection is found associated with the places they have visited. Similar contact tracing tools are also deployed in other places like Japan and Singapore. In particular, **Singapore** is the first place introducing both mobile app and wearable token device under its TraceTogether programme in March 2020 **to help identify people who were in close proximity** with infected cases.¹² Although both serve the same contact tracing function using Bluetooth, the latter device is more targeted at the elderly considering that they may not own a mobile phone or are less digitally connected. At present, more than 50% of Singapore's population have downloaded the app or are using the token¹³, and an estimated 25 000 close contacts of COVID-19 cases have been identified through this programme.¹⁴ For visitors arriving in Singapore, it is a

⁹ The penalty is a fine of up to S\$10,000 (HK\$57,500) or imprisonment of up to six months or both. See Ministry of Health (2020c).

¹⁰ See Ministry of Health (2020e).

¹¹ See Ministry of Health (2020a) and The Straits Times (2020).

¹² When a person is tested positive, the relevant data will be extracted by the Ministry of Health to trace persons who have been in contact with the infected.

¹³ In the past few months, the Singapore government has increased the distribution of tokens by expanding the collection points at various parts of the city. This is in tandem with the introduction of a safety measure requiring visitors to check in with the app or token to high risk venues/premises. These might have driven up the adoption rate.

¹⁴ See WHO (2020b).

requirement for them to download the TraceTogether app and keep it activated during their period of stay in Singapore.

1.9 Coupled with the contact tracing app and token in Singapore is a **digital check-in system** known as SafeEntry for use by businesses. Also regarded as a visitor management system, SafeEntry logs individuals' entry to a venue by scanning QR code with the TraceTogether app or token.¹⁵ Similar to Hong Kong, Singapore has made it **compulsory** for deployment in places with a higher risk of non-transient contact. Its list of premises where check-in system must be deployed is rather long, which cover not only food services and entertainment venues, but also workplaces, education institutes, large retail outlets, hotels, banks, and even funeral parlours.¹⁶ Visitors and customers are required to check in to these venues with the app or token, or they will be denied entry. Probably under the multi-pronged efforts, the number of new confirmed cases has fallen to about seven daily in November 2020, remarkably lower than the average of 506 in April, and 139 in August.¹⁷ A summary of Singapore's precautionary measures and TTT strategy is given in **Figure 4**.

¹⁵ Users can either scan SafeEntry QR code using the TraceTogether app and submit personal particulars, or present the token's QR code (printed at the back) for the visiting venue to scan.

¹⁶ See Smart Nation and Digital Government Office (2020), Ministry of Health (2020f) and TraceTogether (2020).

¹⁷ See covid19 SG (2020).

Figure 4 — Singapore's responses to COVID-19 in terms of precaution, testing, tracking and tracing

Precaution and Testing	Tracking and Tracing
<ul style="list-style-type: none"> • Encourage people to seek medical attention by providing consultation and treatment subsidies for those diagnosed with respiratory infection. • Advise doctors to issue a medical certificate not exceeding five days for patients with respiratory infection; and make it an offence for patients to leave the place of accommodation during the period, unless confirmed with a negative test result. • Administer COVID-19 test for all individuals aged 13 and above diagnosed with acute respiratory infection; patients refusing to be tested will still be issued a medical certificate. 	<ul style="list-style-type: none"> • Made available to members of the public both a tracing app and wearable token based on Bluetooth to identify people in close proximity with infected cases. • All travellers to Singapore must download the TraceTogether app and keep it activated. • Developed a digital check-in system (SafeEntry) for compulsory deployment in places with a higher risk of non-transient contact, e.g. hotels and healthcare facilities (visitors check in and check out by scanning QR code using their TraceTogether app or token).

Sources: Ministry of Health (2020a and 2020b), TraceTogether (2020) and Gov.SG (2020a).

1.10 Unlike some western places taking a relatively laissez-faire approach in dealing with COVID-19, in Hong Kong, close contacts of confirmed cases are taken to quarantine facilities, and all COVID-19 patients are admitted to public hospitals or treatment facilities.¹⁸ While the strategy is key to containing the risk of community spread, non-essential and non-emergency healthcare services have been unavoidably **suspended**. With the infection situation turning worse recently, some healthcare services have been forced to temporarily cut short again. Irregular service suspension highlights a need to establish a longer-term response mechanism to minimize the impact on long-term care services. According to the Organisation for Economic Co-operation and Development, in view of the impact on regular healthcare

¹⁸ See Legislative Council Secretariat (2020).

services, many governments are urging the use of **telemedicine**¹⁹ and are trying to relax barriers to facilitate the development in their local context.²⁰

1.11 For example, in the **United Kingdom**, all general practices are expected to have the ability to carry out video consultations between patients and clinicians. During the initial COVID-19 outbreak, the National Health Service has drawn up a list of pre-approved online consultation suppliers and solutions to enable its service commissioning groups to acquire the services immediately.²¹ In **Singapore**, it provides subsidies of up to 80% of qualifying cost to encourage small- and medium-sized healthcare providers to adopt teleconsultation digital solutions supplied by pre-approved providers.²² The Ministry of Health has also made available telemedicine e-training module for doctors interested in delivering telemedicine services.²³ In Hong Kong, telemedicine is still in the early stage of development. Some public hospitals are piloting telemedicine services while some private practitioners are offering it on a limited basis. In view of uncertainty over the ongoing infection situation, Hong Kong may also see a need to assess the readiness to greater leverage on telemedicine services.

1.12 Since the onset of virus outbreak, the Government has been expanding both quarantine and treatment facilities. In particular, a **temporary hospital** with at least 800 beds is expected to be completed shortly. Including the temporary hospital, there will be at least 5 230 beds available by then, about 60% more than the capacity in August 2020. Despite a marked increase in beds, there seems not much discussion about the readiness of **manpower support**. Given the infectious nature of the disease, some hospitals on the Mainland (e.g. Wuhan) and overseas (e.g. Barcelona) have

¹⁹ According to WHO, there is no consensual definition of telemedicine. It is broadly defined as "the delivery of health care services, where distance is a critical factor, by all health care professionals using information and communication technologies for the exchange of valid information for diagnosis, treatment and prevention of disease and injuries, research and evaluation, and for the continuing education of health care providers, all in the interests of advancing the health of individuals and their communities." Some distinguish it from telehealth with the former restricted to service delivery by physicians only, and the latter signifying services provided by health professionals, including nurses, pharmacists, and others. See WHO (2010c).

²⁰ See OECD (2020a).

²¹ See NHS Digital (2020).

²² See Gov.SG (2020c).

²³ Singapore passed the Healthcare Services Act in January 2020, introducing a services-based licensing regime, among others. Under the Act, telemedicine will be licensed as a healthcare service, starting from 2022 expectedly.

turned to using **advanced technologies** such as 5G and artificial intelligence to facilitate contactless workflow or diagnosis.²⁴ Prompted by the COVID-19 crisis, South Korea has endeavoured to build 18 **smart hospitals** by 2025.²⁵

1.13 While the pandemic has led to acceleration of technology adoption or innovation, efforts in battling the crisis have, however, inevitably put many economic activities to a standstill. In particular, periods of social distancing measures such as class suspension, event cancellation, facilities suspension and business operation restriction aiming to minimize face-to-face interaction have posed exceptional difficult time on different industries in Hong Kong. The challenges being faced by the economy are discussed in the next section.

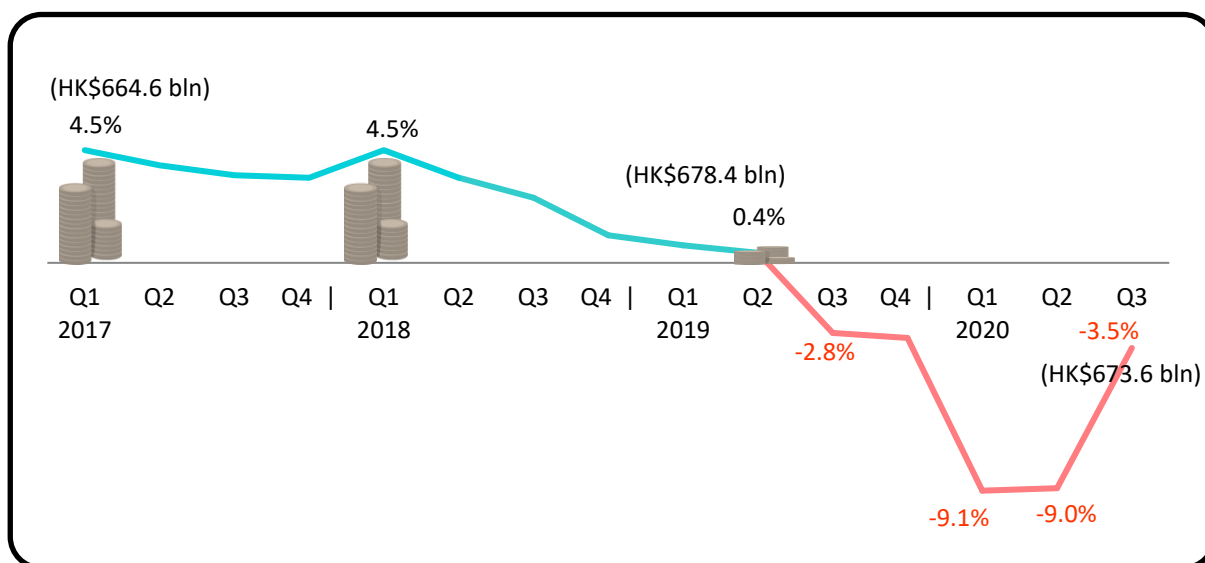
2. Impact on the economy

2.1 Economic uncertainties arising from trade tensions in 2018 and social incidents in 2019 have caused Hong Kong's economy to trend downward. Further impacted by the emergence of COVID-19, Hong Kong has been hit hard with quarterly Gross Domestic Product ("GDP") plunging record-high of some 9% in the first half of 2020 (**Figure 5**). Though the extent of decline in the third quarter has narrowed to 3.5%, contributed largely by improvement in exports of goods amid gradual economic recovery of the Mainland, the level of economic activity is still below the level a year ago before entering recession.

²⁴ See China Daily (2020), European Commission (2020) and IDIBAPS & FCRB (2020).

²⁵ Powered by 5G technology, smart hospitals allow remote, real-time monitoring of patients and cooperation between medical institutions. See Policy Coordination Bureau – General Policy Coordination Division (2020).

Figure 5 — Quarterly real GDP year-on-year % change

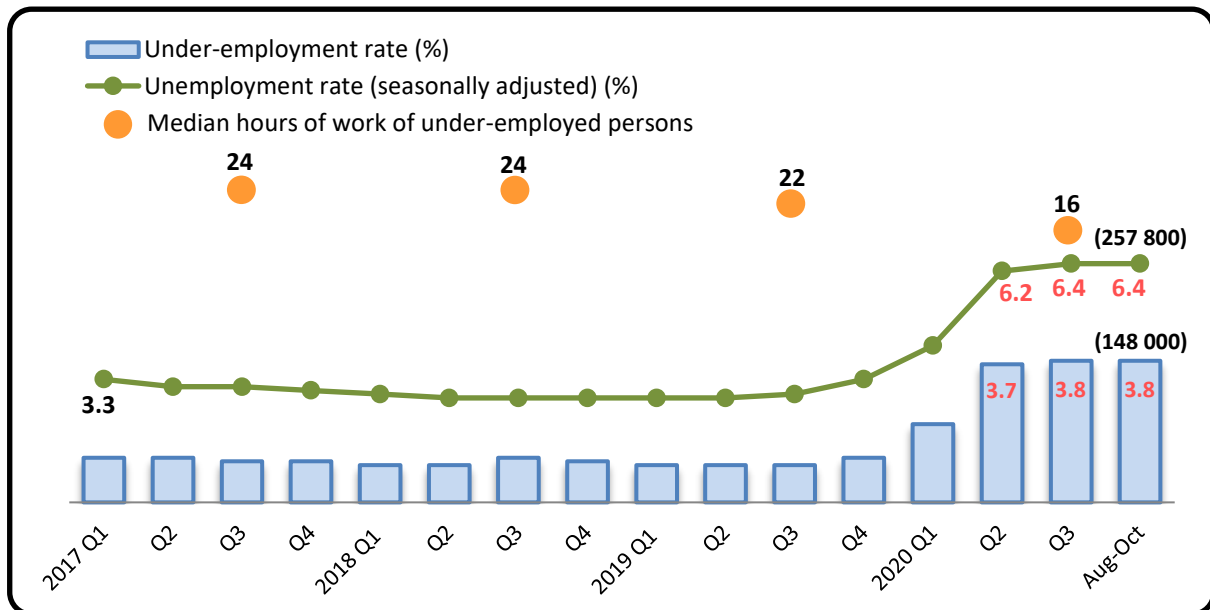


Source: Census and Statistics Department (2020a).

2.2 As a result of COVID-19 impact, **unemployment** rate has risen markedly to 16-year high of 6.4% with almost 260 000 people being unemployed during August to October 2020 (**Figure 6**). Young people aged 15-29 and those in 45-59 made up the largest share of the unemployed, at 32% and 33% respectively. At the same time, the number of **under-employed** persons has increased to 148 000, alongside falling median hours of work.²⁶ With growing number of people becoming unemployed or under-employed, **median monthly household income** has declined sharply in 2020, standing at HK\$26,200 in the third quarter (**Figure 7**). On a year-over-year basis, it represented a drop of 8.4%, the largest decline in the third quarter since 2002.

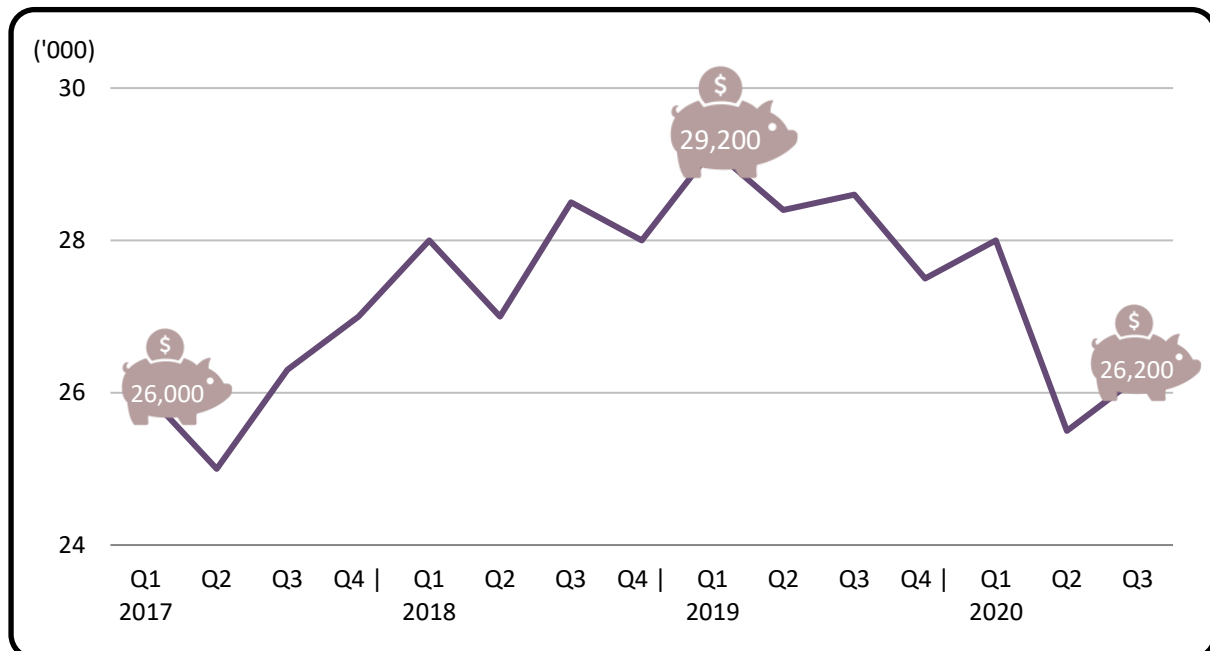
²⁶ It refers to the median hours of work of all employment during the seven days before enumeration.

Figure 6 — Unemployment and under-employment situation



Source: Census and Statistics Department (2020a).

Figure 7 — Trend in median household income since 2017⁽¹⁾

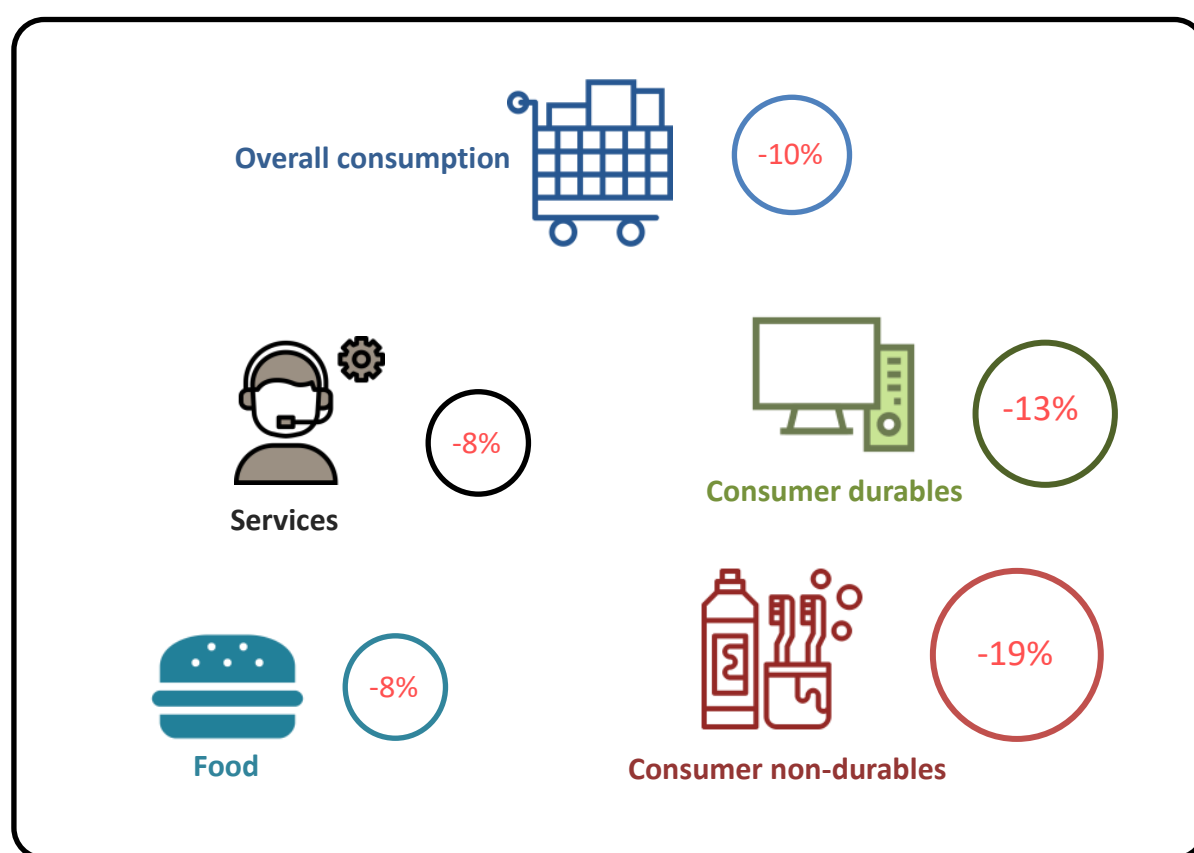


Note: (1) Data excluding foreign domestic helpers.

Source: Census and Statistics Department (2020a).

2.3 Slowdown in social activities, job loss and household income reduction have resulted in low consumption appetite. In the third quarter of the year, **private consumption expenditure** has overall plunged by 10% from a year ago (**Figure 8**). Consumer durables (e.g. electrical goods) and non-durables (e.g. clothes and footwear) saw the most decline, whereas food and services consumption (e.g. transportation and medical and healthcare) registered the least drop.

Figure 8 — Latest situation of private consumption expenditure in domestic market (Q3 2020 year-on-year percentage change)



Source: Census and Statistics Department (2020a).

2.4 Based on economic sectors, it is however found that the impact is rather tilted. From the perspective of **four pillar industries**, **financial services** obviously remain most resilient.²⁷ Its major underlying sectors like asset management and financing have registered **positive growth** in number of establishments and employment in the second quarter of 2020 (**Figure 9**).

²⁷ This is second largest pillar based on the value added data of 2018.

Exports of financial services have shrunk by 4.1%, a vast contrary to the sharp fall of 47.8% in total services exports.²⁸

Figure 9 — Performance of underlying sectors of the four key pillars⁽¹⁾
(year-on-year percentage change in second quarter of 2020)

1st Trading and logistics



(a) Business receipts indices

- Postal and courier **+30.2%**
- Warehousing and storage **+0.9%**
- Import and export trade **-8.9%**
- Wholesale **-12.6%**

(b) Establishments

- Warehousing and storage **-0.4%**
- Postal and courier **-2.1%**
- Wholesale **-3.7%**
- Import and export trade **-4.3%**

(c) Persons engaged

- Postal and courier **+1.8%**
- Warehousing and storage **-2.6%**
- Wholesale **-10.0%**
- Import and export trade **-12.3%**

2nd Financial services



(a) Business receipts indices

- Financing **+9.4%**
- Asset management **+5.9%**
- Insurance **+0.7%**
- Banking **-8.1%**

(b) Establishments

- Insurance **+2.3%**
- Financial services **+0.5%**

(c) Persons engaged

- Financial services **+1.3%**
- Insurance **+0.6%**

3rd Professional services and other producer services⁽²⁾



(a) Business receipts index

- Professional, scientific and technical services **-3.2%**

(b) Establishments

- Professional, scientific and technical services **+1.3%**

(c) Persons engaged

- Professional, scientific and technical services **+0.5%**

4th Tourism services



(a) Business receipts indices

- Food services **-26.0%**
- Retail **-31.4%**
- Accommodation services **-70.4%**
- "Tourism, convention and exhibition services" domain **-94.8%**

(b) Establishments

- Retail trade **-4.2%**
- Accommodation services **-8.8%**
- Food and beverage services **-8.6%**

(c) Persons engaged

- Retail trade **-8.1%**
- Accommodation services **-14.4%**
- Food and beverage services **-15.4%**

Notes: (1) The above just represented major sectors under the respective pillar industries.

(2) "Other producer services" cover those provided to companies for intermediate consumption in the local economy, including food and beverage services, accommodation services and retail, but relevant statistical figures are not available.

Source: Census and Statistics Department (2020a).

²⁸ See Census and Statistics Department (2020b).

2.5 The largest pillar – **trading and logistics** – appears to have been mildly impacted. In the second quarter of 2020, both import and export trade and wholesale have markedly declined. However, the former has seen some **improvement** in the third quarter.²⁹ The HKTDC Export Index, which gauges the prospects of the near-term export performance of Hong Kong traders, has also recorded a rise for three consecutive quarters, indicating improved confidence amid the challenging time.³⁰ Logistics related sectors, namely postal and courier, and warehousing and storage, have even registered **positive growth** amid the pandemic.

2.6 The impact on the third largest pillar – **professional services and other producer services** – tends to be mixed. Professional services, represented largely by "professional, scientific and technical services", have recorded a **mild increase** in both establishments and employment in the second quarter. For other producer services³¹, which pertain only to the part of services provided to companies for intermediate consumption in the local economy (as well as services exports provided to companies and individuals), may however see a larger impact amid business slowdown and increased redundancy. Although the updated statistics on this part is not available, the performance in retail trade, food and beverage services, accommodation services, etc. which form part of producer services may shed some light (Figure 9).

2.7 **Tourism**, the fourth largest pillar, is apparently the most disastrous industry among the four. With cross-boundary restrictions widely in place, inbound and outbound travel activities have unprecedentedly come to a standstill. Reflecting this, business receipts index for "tourism, convention and exhibition services" have plummeted profoundly by 95% in the second quarter. Collapse of tourism explains in varying extent the decline in services industries, particularly food and beverage services, retail trade, accommodation services, and cross-boundary transportation.

2.8 Implementation of different social distancing measures has also caused the emerging fifth largest industry – **cultural and creative industries** to face some uncertainty and challenges, given that part of the underlying sectors are performances based and/or require physical attendance. These sectors

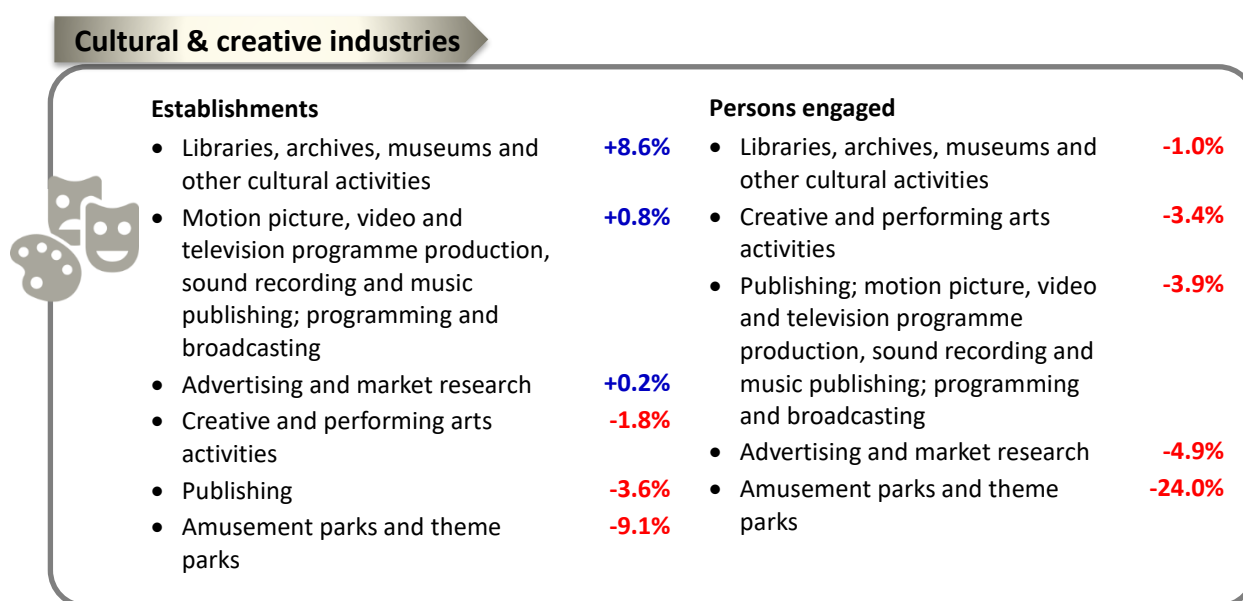
²⁹ See GovHK (2020g and 2020h).

³⁰ See Hong Kong Trade Development Council (2020).

³¹ "Other producer services" refer to producer services other than financial services, trading and logistics, tourism and professional services.

have dropped visibly in establishment number and employment in the second quarter of 2020 (**Figure 10**). On the other hand, some other sectors such as software, computer games and interactive media have reportedly gained more business in the middle of the crisis.³²

Figure 10 — Performance of underlying sectors of cultural and creative industries⁽¹⁾ (year-on-year percentage change in second quarter of 2020)



Note: (1) The above sectors/domains are not exhaustive.

Source: Census and Statistics Department (2020a).

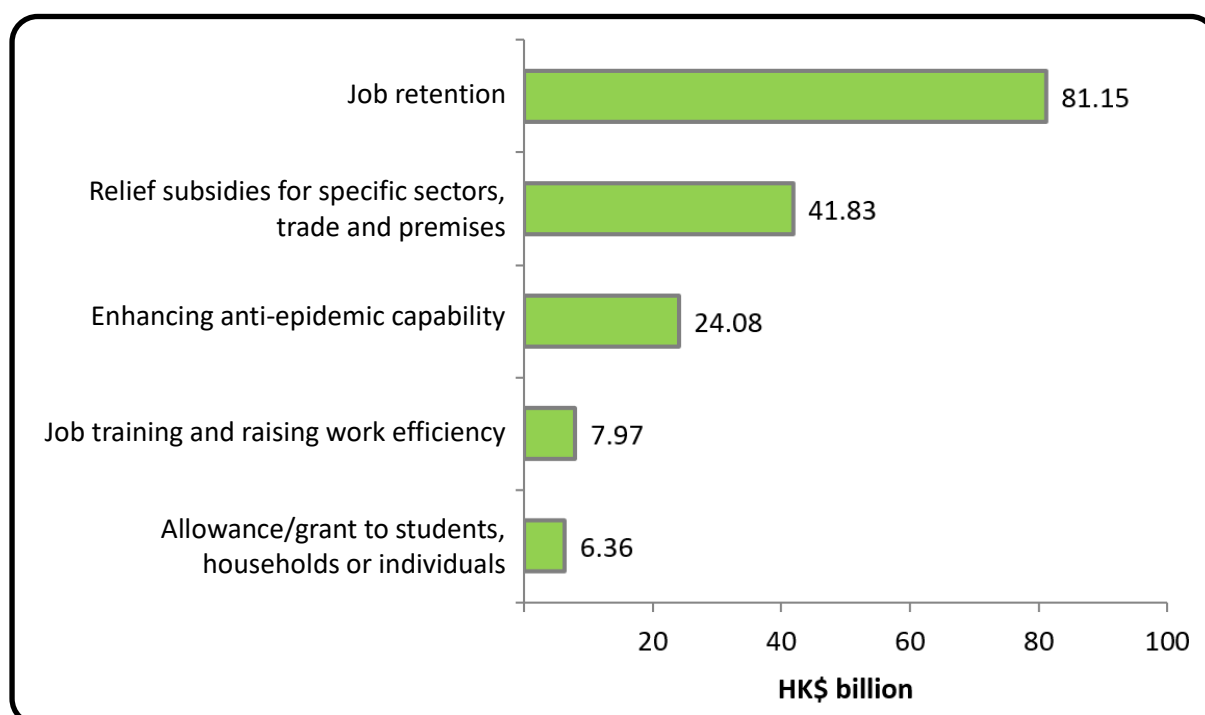
3. Government relief measures and the way forward

3.1 In the face of the immediate and huge impact of COVID-19, the Government set up a dedicated fund "**Anti-epidemic Fund**" in February 2020 with three rounds of measures rolled out. The financial commitment under the Anti-epidemic Fund and other accounts totalled HK\$191.5 billion, equivalent to about 6.7% of GDP in 2019. Added to this is the HK\$120 billion relief package under 2020-2021 Budget. Among the three rounds of financial commitments, the largest sum (HK\$81.15 billion based on original estimated expenditure) was for **job retention**, followed by a sum of HK\$41.83 billion as

³² See 頭條日報 (2020) and Engadget (2020).

relief measures for affected businesses and sectors, and HK\$24.08 billion for enhancing anti-epidemic capability (Figure 11).

Figure 11 — Major usages of three rounds of financial commitment⁽¹⁾



Note: (1) The financial commitment is based on the original estimate. The portion relating to loan guarantee and forgoing revenue (e.g. fee concessions or waivers for businesses and individuals) is not shown above.

Sources: GovHK (2020b, 2020c, 2020d and 2020e).

3.2 Job retention, through **Employment Support Scheme**, is the most significant component under the Anti-epidemic Fund. The first tranche of the Scheme has secured over 1.9 million headcounts, while the second tranche secured over 1.6 million headcounts. According to the Government, the updated estimated expenditure of the Scheme was **HK\$92.35 billion**, 14% higher than the original estimate. While the measure has effectively curbed sharp rise in overall unemployment, the industries of food services, construction and arts, entertainment and recreation have still gone **over 10%** in unemployment (**Figure 12**).

**Figure 12 — Unemployment number and rates in different industries
(Aug-Oct 2020)⁽¹⁾**

Trading and logistics



• Import and export trade	16 800	(5.3%)
• Warehousing & related support activities	6 400	(8.0%)
• Postal and courier	1 100	(5.3%)
• Wholesale	700	(3.6%)

Financial services



• Financing	7 000	(3.1%)
• Insurance	1 800	(2.5%)

Professional services and other producer services



• Professional and business services (excl. cleaning)	19 600	(5.5%)
• Information and communications	7 400	(5.2%)
• Real estate	6 400	(4.0%)

Tourism services



• Food and beverage services	34 800	(14.8%)
• Retail	25 400	(8.6%)
• Transportation	13 100	(6.2%)
• Accommodation	3 700	(9.2%)

Cultural & creative industries



• Arts, entertainment and recreation	6 000	(10.5%)
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Others



• Construction	37 800	(11.0%)
• Education	10 300	(4.5%)
• Manufacturing	7 200	(6.5%)
• Human health services	4 000	(2.5%)
• Social work	3 100	(3.8%)
• Public administration	1 300	(1.0%)

Overall: 257 800 (6.6%, not seasonally adjusted)

Note: (1) The average unemployment rate (not seasonally adjusted) was about 3.3% from 2010 to 2019.
Source: Census and Statistics Department (2020a).

3.3 It is anticipated that with the second tranche of the Employment Support Scheme ended in November 2020, unemployment number will soar further. However, considering the significant drop in fiscal reserves after three rounds of anti-epidemic measures, the Government has indicated that it would not continue the universal Employment Support Scheme. Rather, it would roll out more targeted measures to support the businesses.³³

3.4 To extend the support and save resources, there have been views that unused amount of the schemes under the Anti-epidemic Fund could be re-allocated to meet other funding needs. For example, the latest estimated expenditure on "technology applications to enable reusability of masks" was HK\$230 million, 70% lower than the original estimate.³⁴ However, according to the Government, it is difficult to accurately estimate the final expenditure or savings under individual measures at this juncture. It would monitor the development and optimize the unspent balance of the Fund to provide support and assistance as and when needed.

3.5 COVID-19 has equally caused overseas places to struggle with high unemployment. While many have in place a similar job retention scheme, some have focused or extended the support in the **most affected sectors or businesses**. For example, in **New Zealand** and **Japan**, businesses with revenue decline beyond a threshold due to COVID-19 are eligible for wage subsidies; in the **United Kingdom**, retail outlets subject to mandatory closing down may claim wage subsidies; in **France**, self-employed experiencing a sharp drop in turnover are entitled to income support. Similarly, in **Singapore**, for the most disrupted sectors like aviation, food and accommodation, wage subsidies are extended to the first quarter of 2021, after completion of the previous rounds which involved S\$23.5 billion (HK\$135 billion) or 25% of the relief budgets.

³³ See 香港電台網站 (2020).

³⁴ See GovHK (2020b and 2020i).

3.6 In Hong Kong, in view of worsening economic situation, the Government has relaxed the criteria for unemployment allowance under the Comprehensive Social Security Assistance Scheme ("CSSA").³⁵ Yet, because the eligibility criteria remain stringent³⁶, those receiving such allowance under CSSA only accounted for about **7%** of all unemployed. The Government has on various occasions rejected the idea of setting up a dedicated contribution-free unemployment fund on the ground of fiscal sustainability.³⁷ Though it has allocated HK\$6 billion under the Anti-epidemic Fund to create about 30 000 time-limited jobs and increased the ceiling of on-the-job training allowance for youth, disabilities and elderly, those who could benefit from the support remain limited.

3.7 In the recent Policy Address, the Government has unveiled a youth employment initiative in the Greater Bay Area with an initial quota of 2 000. Apart from that, it would also provide wage subsidies to create sector-specific jobs suitable for young people. A similar job growth initiative is also seen in **Singapore**, where its government co-pays with employers for new hires for one year.³⁸ Different from Hong Kong's, the scheme, funded with S\$1 billion (HK\$5.75 billion), targets more on middle to old age workers aged 40 and above, considering that they might be more difficult to find a new job after job loss. Eligible firms hiring workers of this cohort are entitled to 50% wage co-payment subject to a cap, as opposed to 25% for hiring people under 40. Sectors being less impacted such as financial services and information and communications technology are expected to see more job growth.³⁹

³⁵ The Government has introduced a time-limited "Special Scheme of Assistance to the Unemployed" through the CSSA system. The asset limits for able-bodied applicants under the CSSA Scheme have been temporarily relaxed by 100% from June 2020 to May 2021. See GovHK (2020j).

³⁶ The current asset limit is HK\$66,000 for singles; plus additional HK\$44,000-HK132,000 for an applicant with one to three family members; and additional HK\$176,000 for an applicant with four or more family members. The asset limit does not include housing properties. As announced in the Policy Address, the total cash value of insurance policies of able-bodied applicants/recipients will also be disregarded as assets for a period of one year.

³⁷ See 勞工及福利局 (2020).

³⁸ See Gov.SG (2020e).

³⁹ Ibid.

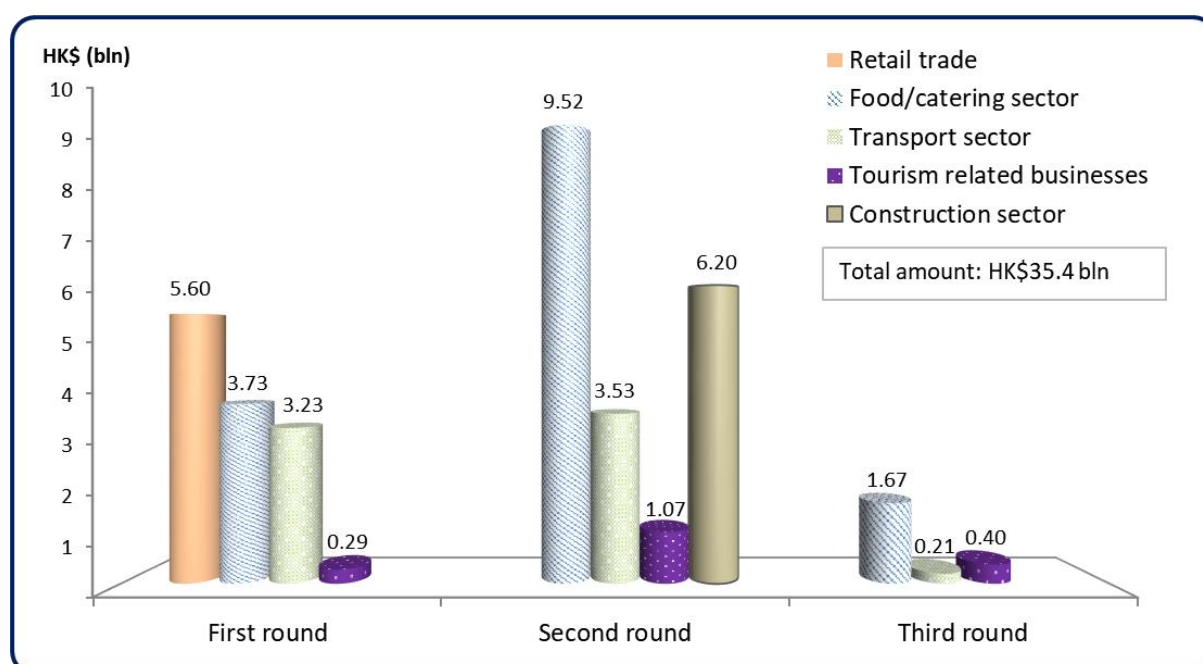
3.8 Meanwhile, Singapore has also put in place a temporary redeployment programme for the aviation sector, with 500 aircrew being redeployed to hospitals as care ambassadors so far. Similarly, **Sweden** has also offered a short medical training to laid-off staff in the airline industry. Those who have completed the training are arranged to work in hospitals by performing administrative tasks, welcoming patients, etc. that enable them to make use of previous work skills like safety and caring for people.⁴⁰ In **France** and **Ireland**, their governments have set up a free online job platform to facilitate recruitment by those sectors in need of more labour, such as health and telecommunications. The latter is even built with a function to match employers' job requirements to jobseeker profiles using technology.⁴¹

3.9 In Hong Kong, apart from the universal Employment Support Scheme, the Anti-epidemic Fund has provided relief subsidies for **specific sectors, trade and premises** to help them stay afloat during the difficult time and get them prepared for recovery when the epidemic is over. Types of businesses being supported are widespread, ranging from food/catering, construction, private schools, arts groups, and gym houses to game centres. Three rounds of subsidies totalled about HK\$41.83 billion. Of this amount, around HK\$35.4 billion or over **80%** were used to support the sectors of retail, food/catering, transportation, construction and tourism-related businesses (**Figure 13**). The level of subsidies varied among the sectors. For instance, each retail outlet is eligible for a flat sum of HK\$80,000; hotels are each eligible for HK\$300,000 or HK\$400,000 depending on guestroom number; travel agents are given relief subsidies based on staff size. Recently, the Government has indicated in the Policy Address that an additional HK\$600 million will be set aside to specifically help the tourism sector, in view of its prolonged recovery uncertainty.

⁴⁰ See OECD (2020b).

⁴¹ See Jobsireland.ie (2020).

Figure 13 — Relief subsidies for specific sectors, trade or affected premises⁽¹⁾



Note: (1) Under the second round of the subsidy scheme for catering businesses, eligibility did not apply to those businesses which had applied for the Employment Support Scheme. The transport sector above does not cover the aviation sector.

Sources: GovHK (2020b, 2020c, 2020d and 2020e).

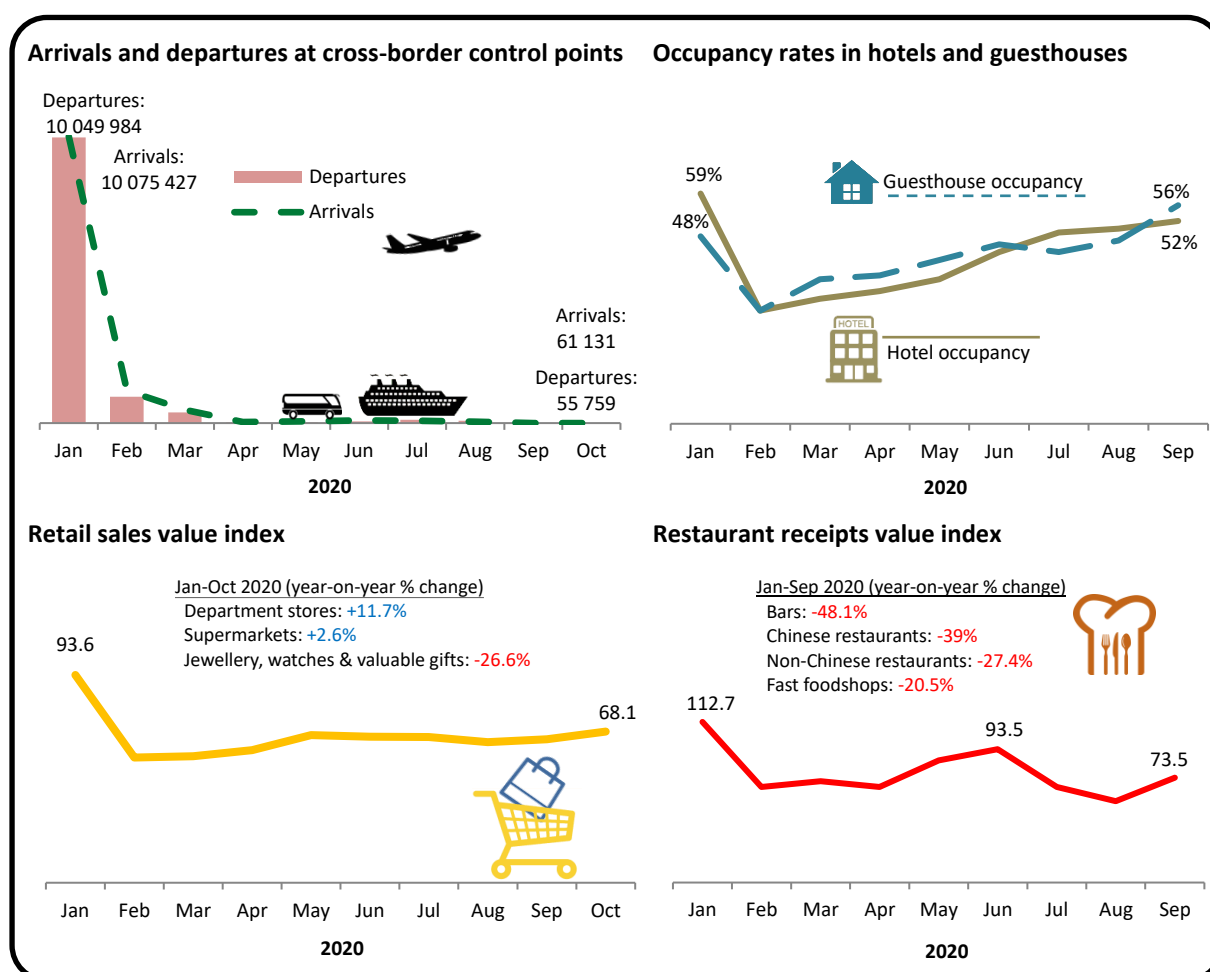
3.10 Other helping measures available include raising the maximum loan amount under the SME Financing Guarantee Scheme, with an extension of repayment period and principal moratorium to help ease the cash flow pressure. Nevertheless, recovery of them will to a great extent depend on the pandemic development and policy support. This is especially so for tourism-related sectors. In 2003 when the severe acute respiratory syndrome **SARS** took place, retail, food and accommodation services were similarly hardest hit. However, they exhibited a rather fast turnaround after the crisis was over. Vacancies in all these sectors grew sharply in the subsequent years, which are believed partly attributable to the Individual Visit Scheme under the Closer Economic Partnership Arrangement.⁴²

3.11 Almost 11 months into the pandemic, Hong Kong, however, is now still struggling with revival of economic activities amidst infection cases rebound. Passenger arrivals and departures at cross-boundary points have maintained at record low, whereas both retail sales and restaurant business have not seen strong rebound (**Figure 14**). Hotels and guesthouses have just

⁴² The Scheme was at first opened to four Mainland cities in 2003, and was then extended to over 20 cities a year later, and further to 49 cities in 2007.

improved a bit in occupancy, likely as a result of increased local demand and the stay-hotel quarantine requirements for incoming travellers.⁴³ To re-open the economy, the Government has said that it would progressively ease the travel restrictions, subject to the pandemic situation. Earlier on, it has removed the quarantine requirement for Hong Kong residents coming back from the Guangdong Province or Macao. However, the planned travel bubble with Singapore has been deferred due to the recent outbreak.

Figure 14 — Tourism related business performance since January 2020



Sources: Census and Statistics Department (2020a), PartnerNet (2020) and Transport Department (2020).

⁴³ The requirement first applied to foreign domestic helpers. Starting from 13 November 2020, inbound travellers from overseas are subject to compulsory quarantine at hotels for 14 days.

3.12 Though the recent surge in infection in many places has posed continued uncertainty on international travel, the counterpart of **Singapore** seems to have taken an active approach on easing travel restrictions when the situation was a bit stable previously. For example, it has **waived** the quarantine requirement for travellers from Australia, New Zealand, Vietnam and Brunei, requiring them only to complete a COVID-19 viral test upon arrival. For travellers from places like the Mainland, Malaysia and Taiwan, their mandatory quarantine period has been **reduced** from 14 days to seven days. To re-open business travel, **Japan** has made reciprocal arrangement with Singapore and South Korea, allowing business travellers from these places to conduct limited business activities during the 14-day quarantine period, on condition that they follow additional quarantine measures, including submission of travel schedule showing the accommodation and destinations during the 14 days. Reportedly, it is considering further exempting the quarantine requirement for short-stay business travel from low-risk countries.⁴⁴

3.13 Although different places are seeking to relax travel restrictions, maintaining safety measures remains important to facilitate stable resumption of social activities. To this end, **South Korea** has outlined a plan under its economic recovery plan to develop **contactless** ("untact") **society** from remote work to online shopping and telemedicine by leveraging on cutting-edge technologies,⁴⁵ whereas **Singapore** has placed a strong emphasis on the part of **contact tracing**. In places where there may be close interaction among attendees, such as large business-to-business events and live performances, it is **compulsory** for them to implement the SafeEntry check-in system, whereas all participants are **required** to conduct check in using the contact tracing app or token. Currently, they are even piloting a **pre-event testing initiative** using antigen rapid tests, which can return results within half an hour. However, its government acknowledges that it has a lower accuracy rate compared with the conventional Polymerase Chain Reaction test (also known as nucleic acid test).⁴⁶

⁴⁴ See The Japan times (2020).

⁴⁵ There will be investment in technologies that enable untact services, such as robotics, drones and high-speed internet. See World Economic Forum (2020).

⁴⁶ See Ministry of Health (2020b).

3.14 While different places are adjusting to the new normal after months of virus fighting, it is still unclear about the recovery path of various sectors, particularly tourism. To support local tourism, the Hong Kong Tourism Board has rolled out a "Free Tour" programme under which residents can join a free tour upon spending a certain amount at retail and dining outlets. Many places have also introduced incentives to boost local consumption. Their form of support appeared diverse. On the **Mainland**, various local governments have issued digital consumption vouchers for direct use in restaurants, retail outlets, etc. In **Japan**, it has launched a four-month "Go To Eat" campaign with a budget of 61.6 billion yen (HK\$4.6 billion) to support hard-hit restaurants. Diners who eat at participating restaurants will be awarded points (500 yen (HK\$37) for lunch and 1,000 yen (HK\$74) dinner) for use in the next visit.⁴⁷ Apart from encouraging local spending, Japan reportedly will roll out a new stimulus package towards end of the year, focusing more on longer term productivity through digital innovation and green investment.

3.15 In **Taiwan**, it has launched a "Triple Stimulus Voucher" programme, allowing every citizen to spend NT\$1,000 (HK\$272) for a consumption voucher worth of NT\$3,000 (HK\$816). Low-income or disadvantaged families can even get the vouchers for free.⁴⁸ Likewise, **South Korea**, under its domestic spending revitalization plan, has distributed discount coupons for consumption in eight different areas in the cultural, leisure and services sectors.⁴⁹ As part of its 2021 budget proposal, it will also issue another 500 billion won (HK\$3.5 billion) worth of vouchers to stimulate consumption. Similar spending incentive is also seen in **Singapore**, where each eligible Singapore citizen is given a S\$100 (HK\$580) voucher for spending in staycation, attraction tickets or local tours, involving a budget of about S\$320 million (HK\$1,860 million) which represented less than 1% of its four rounds of relief budgets.

⁴⁷ If the same user makes multiple reservations at the same restaurant, 20 000 points are capped per month at that restaurant. See Go To Eat (2020).

⁴⁸ See Global News for New Immigrants (2020).

⁴⁹ See The Korea Herald (2020).

Figure 15 — Summary of overseas examples of responding to economic challenges posed by the COVID-19 pandemic

Support employment in vulnerable sectors

- Providing **wage subsidies** to businesses in New Zealand and Japan with **revenue decline** beyond a threshold due to COVID-19; **retail outlets** in the United Kingdom subject to mandatory closing down; and **self-employed in France** experiencing sharp drop in turnover.
- Extending wage subsidy support to **disrupted sectors** (e.g. food and accommodation) in Singapore to Q1 2021.

Support unemployed

- **Redeploying persons in the airline industry** to the healthcare sector in Singapore and Sweden; creating more jobs in **out-performing sectors** (e.g. financial services) in Singapore.
- Setting up a **free online job platform** to facilitate recruitment in sectors in need of labour in Ireland, with a job matching function using technology.

Recover inbound travel

- **Waving or shortening the quarantine requirement** in Singapore for visitors from lower-risk places (e.g. Australia and Malaysia).
- Allowing **limited business activities** during the quarantine period in Japan for business visitors from Singapore and South Korea.

Re-open social activities

- Developing **contactless society** in South Korea.
- Strengthening **contact tracing** in Singapore by mandating implementation of SafeEntry check-in system in large events.

Support local consumption

- Issuing **consumption or discount coupons** to support retail and/or other targeted sectors (e.g. restaurants, cultural and leisure sectors) in Japan, Singapore, South Korea and Taiwan.

Sources: OECD (2020b and 2020c), Jobsireland.ie (2020), Ministry of Health (2020f), Go To Eat (2020), The Korea Herald (2020), Ministry of Social Development (2020), JETRO (2020), GovUK (2020), World Economic Forum (2020), Gov.SG (2020d and 2020e), Chinese Briefing (2020), 振興三倍券 (2020), Ministry of Foreign Affairs of Japan (2020a, 2020b and 2020g) and ILO (2020).

3.16 COVID-19 pandemic has caused profound economic disruption and it may redefine critical sectors of the economy. The effect of the above spending stimulus measures might therefore just be short term. Recently, the Chief Executive has delivered her Policy Address revealing a series of economic recovery initiatives. Covered areas include commerce, innovation and technology, and the relevant development and cooperation initiatives

under the Greater Bay Area. While these proposals will take time to implement and take effect, the Government envisions that the policy measures will be key for Hong Kong to revive its economy in the longer term.

4. Observations

4.1 Hong Kong has been facing exceptional challenges caused by the public health crisis. Almost a year has passed, the situation remains challenging as the fourth wave of outbreak continues to rage on. On healthcare, the Government has in the past few months strengthened its efforts in testing, tracking and tracing by, for example, introducing rules for mandatory testing and offering a grant for grassroots patients infected with COVID-19 to relieve their financial concern. However, there remained concerns about the risk of transmission if members of the public delay to seek medical attention when feeling unwell. It is noted that in Singapore, it has taken a proactive step by providing consultation and treatment subsidies to all patients with respiratory infections. As a precaution, those diagnosed with respiratory symptoms will be issued a medical certificate not exceeding five days, during which patients are legally required to stay at home, unless they are confirmed with a negative test result. To recognize participating private clinics' efforts to combat COVID-19, they have been given a one-off support grant.

4.2 Hong Kong has newly introduced a contact tracing app "LeaveHomeSafe", and requires certain high-risk premises such as restaurants and entertainment venues to display the QR code. While businesses and individuals are adapting to the new tool, in Singapore, it is compulsory for a range of businesses and services to deploy a similar check-in system, including hotels, events, large retail outlets and education institutes. Visitors and customers are also required to check in using their contact tracing app or token. This safety measure is considered useful to re-opening social activities under the "new normal", especially where there is close interaction among attendees, or where masks may not be worn at all times due to the nature of the activities. Its government has pointed out that 25 000 close contacts of COVID-19 cases had been identified through the app and token. In view of its observed usefulness, some have urged the Government to expand the usage of its "LeaveHomeSafe" app in the community.

4.3 Amidst the public health crisis, some regular medical services in both public and private sectors have been suspended or distorted. This has given rise to the growth of telemedicine. Some overseas places such as Singapore and the United Kingdom have strengthened the support to the remote services during the period, for instance, providing subsidies for purchase of related solutions, drawing up a list of pre-approved service suppliers, and/or providing relevant e-training to medical doctors. At present, Hong Kong's telemedicine development is still at infant stage. The developments in overseas places might necessitate Hong Kong to assess the regulatory and technical readiness in order to catch up with the trend.

4.4 As a result of COVID-19 which led to unprecedented cross-boundary control and a raft of social distancing measures in place, Hong Kong has seen a record plunge in economic performance in the first half of 2020. While the two largest pillar industries (trading and logistics and financial services) have not been deeply impacted, the fourth largest pillar, tourism, has virtually collapsed. Unemployment and under-employment are on the rise while private consumption and median household income on the fall. Though the Government has greatly supported job retention with over HK\$90 billion under the Anti-epidemic Fund, the sectors of construction, food services and arts, entertainment and creation still saw over 10% unemployment rate.

4.5 With the Employment Support Scheme ended in November and the package of relief measures expiring, the Government has announced in the 2020 Policy Address further helping measures for the unemployed and the tourism sector. Nevertheless, the recent fourth wave of outbreak is re-posing pressure on the operations of many businesses. In some places like Japan, New Zealand and Singapore, they have continued to provide wage subsidy for businesses or sectors subject to mandatory closing down or have faced sharp revenue loss caused by COVID-19; in Sweden, a job redeployment initiative was introduced to specifically help the unemployed in the airline industry; in Singapore, more jobs are being created in the outperforming sectors by way of wage co-payment under its S\$1 billion (HK\$5.75 billion) scheme, with a higher co-payment rate for new hires in middle to old age. In Ireland, it has developed an online job platform with the capability of auto-matching of job applicants to employers.

4.6 Hong Kong has formed travel bubbles with Singapore as an initial step to re-open tourism. However, the plan has been deferred due to the recent outbreak. In fact, when the infection situation has subsided before, some places have made more diverse adjustments to their boundary control measures, for example in Singapore, it has reduced the quarantine period to seven days or waived the quarantine requirement for visitors from low-risk countries, and in Japan, it allows limited business activities during the quarantine period for travellers from Singapore and South Korea. These may be the alternative control measures to explore when the infection situation allows. South Korea is even actively developing more contactless services in society by leveraging on advanced technologies, which will help recover their tourism in the long term.

4.7 Despite the fact that different places are striving to reopen gradually the economy, the recovery path remains vague and revival of tourism in the short run is even more challenging. Previously, Hong Kong has launched a "Free Tour" programme under which residents could join a free tour by spending a certain amount in retail and dining outlets. Many places in Asia have also introduced similar initiatives but their form and coverage vary. For example, Taiwan offers citizens a NT\$3,000 (HK\$816) voucher for a price of NT\$1,000 (HK\$272) for general local spending; Japan supports the hard-hit restaurants by awarding points to diners for use in their next visit; South Korea's and Singapore's vouchers are extended to arts performances, attraction tickets and/or staycation as well. These sweeteners, though short-time, are seen to be welcomed by both businesses and users, which may be of reference when devising local consumption stimulus.

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