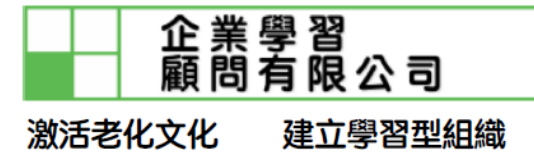


主辦機構：



特別鳴謝：



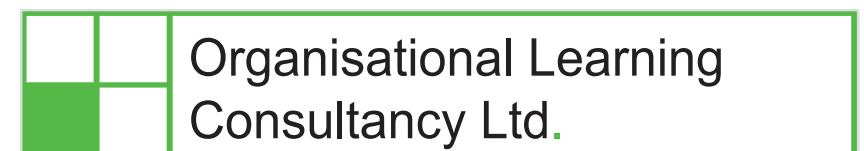
# 「疫情下的環球市場大混亂： 『危』 『機』 轉化」 網絡研討會 (抗疫 「贏」 商講座系列之一)

2020年3月27日



2020年3月27日

## Global Market in the Epidemic: Turning Crisis into Opportunity Webinar 疫情下的環球市場大混亂：“危機轉化” 網絡研討會



**Joe Leung** PhD (Warwick)  
梁永忠 博士

## About the Speaker 討論與分享

Dr. Joe Leung 梁永忠博士

Organisational Learning Consultancy Ltd. 企業學習顧問有限公司

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Dr. Joe Leung is founder of Organisational Learning Consultancy Ltd. and gained the doctoral degree in Warwick University (U.K.). As one of the consultant pioneers of “Corporate Governance” and “Learning Organisation” in Hong Kong, Dr. Leung has provided his consultancy services for more than 50 companies: including Corporate Growth Strategy, Entrepreneurial Leadership, Governance System and Organisational Transformation. In the last 17 years, more than 9,500 entrepreneurs, executives and managers have attended Dr. Leung’s Executive Learning Workshops.

Since 2003, Dr. Joe Leung has launched the training of Corporate Governance in Hong Kong and participated the Governance Project of SME Corporate Governance Toolkit – From Guideline to Implementation. This Toolkit covers “How-to-do” steps of implementation in Corporate Governance. Throughout the years, Dr. Leung has assisted his clients (non-public-list companies) in implementing the Corporate Governance (Strategy-Leadership-Governance Framework) to formulate sustainable growth strategy and change plan. In 2019, one of his clients gained the Directors of the Year Awards 2019 in achieving the high standard in Corporate Governance.

梁永忠博士是企業學習顧問有限公司的創始人，獲得了英國華威大學的博士學位。作為香港“企業管治”和“學習型組織”的顧問先驅之一，梁博士為 50多家公司提供諮詢服務，包括：企業戰略力，企業領導力，企業治理力和企業變革力。在過去的17年中，超過 9,500多名企業家，高管和經理們參加了梁博士的行政人員培訓研討會。

自2003年以來，梁永忠博士在香港開展了企業管治培訓，並參與了【香港中小企業管治導引全集 - 由指引到實踐】政府項目，該全集涵蓋了企業管治“操作方法”的實施步驟。多年來，梁博士一直協助其客戶（非上市公司）實施企業管治（戰略力—領導力—治理力構架），製定可持續增長戰略和變革計劃。在2019年，他的客戶在實現高標準的企業管治方面獲得了香港董事學會 2019年度傑出董事獎。

## What is the Unpected Influence on the Economy and Business Activity? 對經濟和商業活動“意料之外”的影響是什麼？

Coronavirus Map: Tracking the Spread of the Outbreak 新冠狀病毒圖：追踪爆發的傳播

<https://graphics.reuters.com/CHINA-HEALTH-MAP/0100B59S39E/index.html>

# Thing to Know Before: The Importance of China in Global Economy

## 事前須知：中國在全球經濟中的重要性

圖 1: 中國更融入全球經濟 (佔世界的百分比)

Figure 1: China is More Integrated in the Global Economy (% of world)

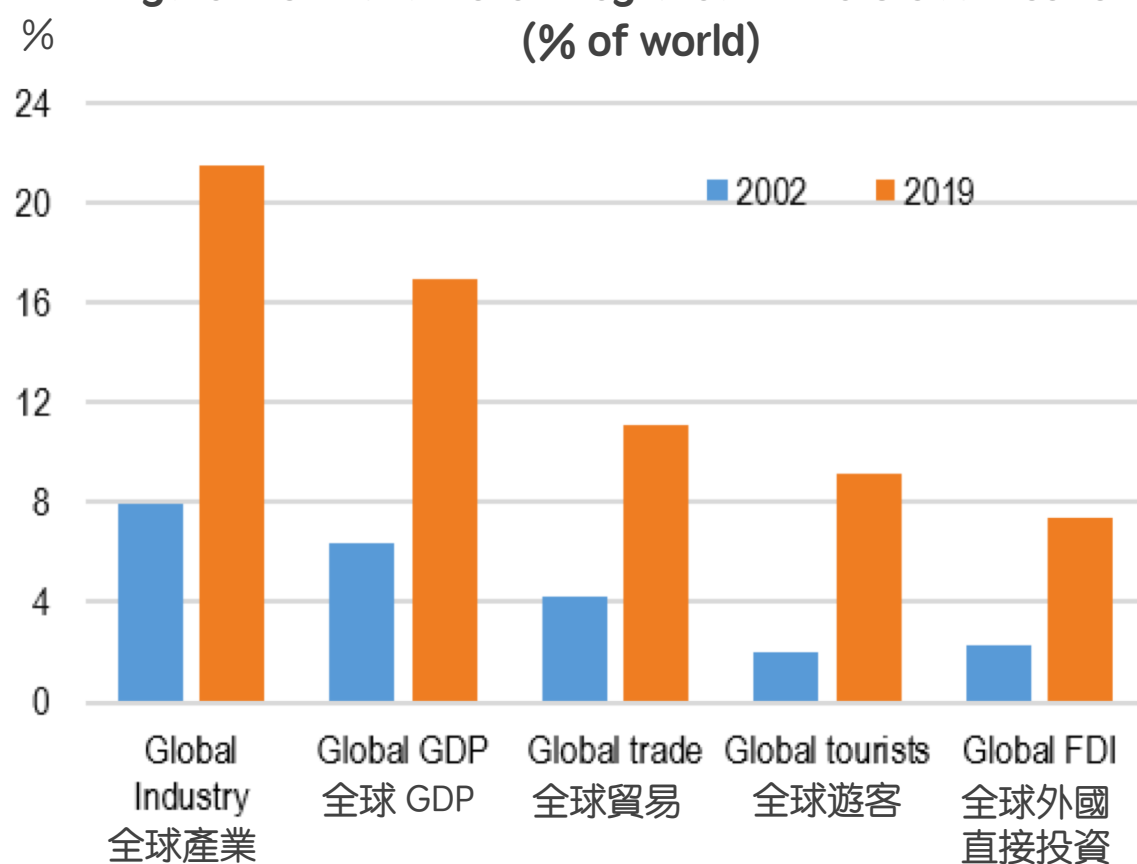
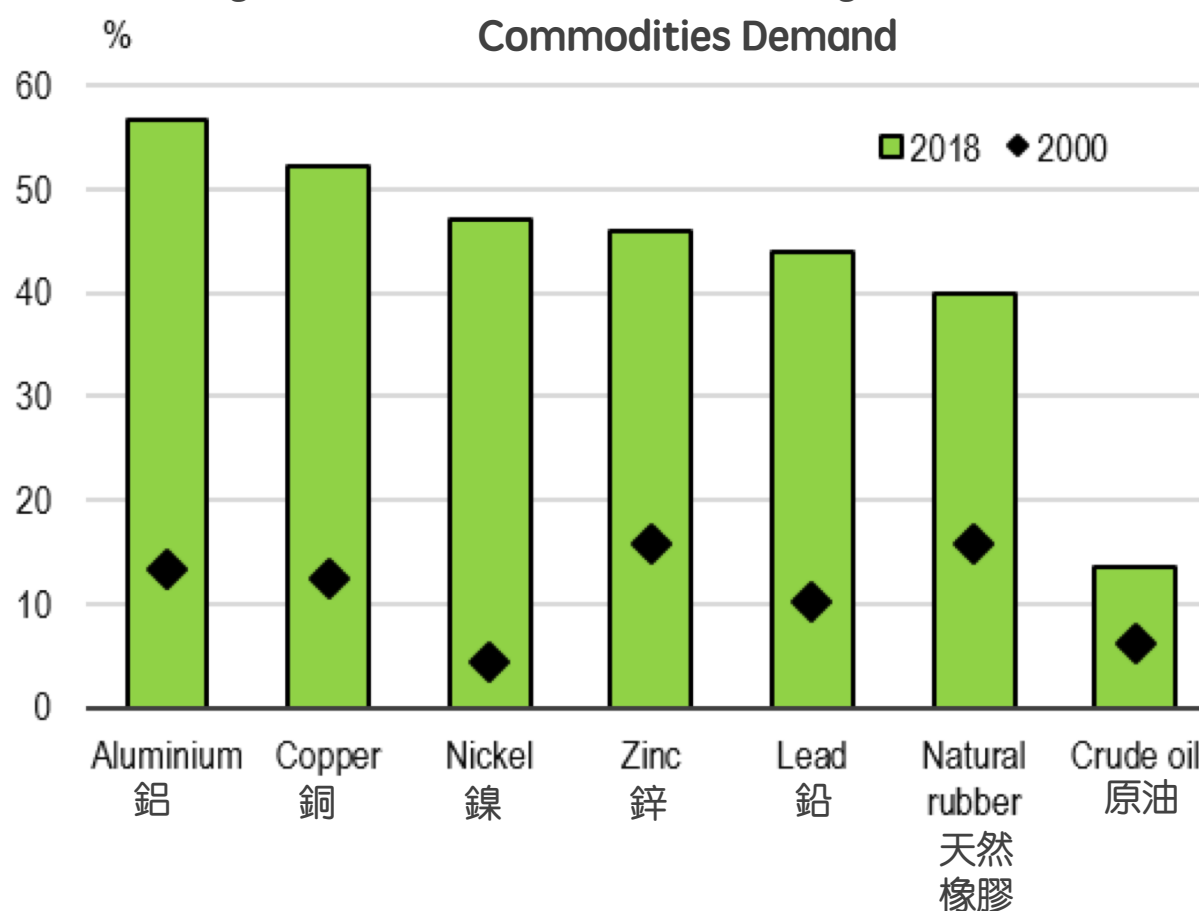


圖 2: 中國在全球大宗商品需求中佔很大份額

Figure 2: China Accounts for a Large Share of Global Commodities Demand



Source: Coronavirus: The World Economy at Risk (2020), OECD Interim Economic Outlook Assessment, 2 March 2020.

# Global Economy and China-US Trade Tension

## 全球經濟與中美貿易緊張局勢

圖 3: 全球貿易增長已經疲軟  
Figure 3: Global Trade Growth is Already Weak

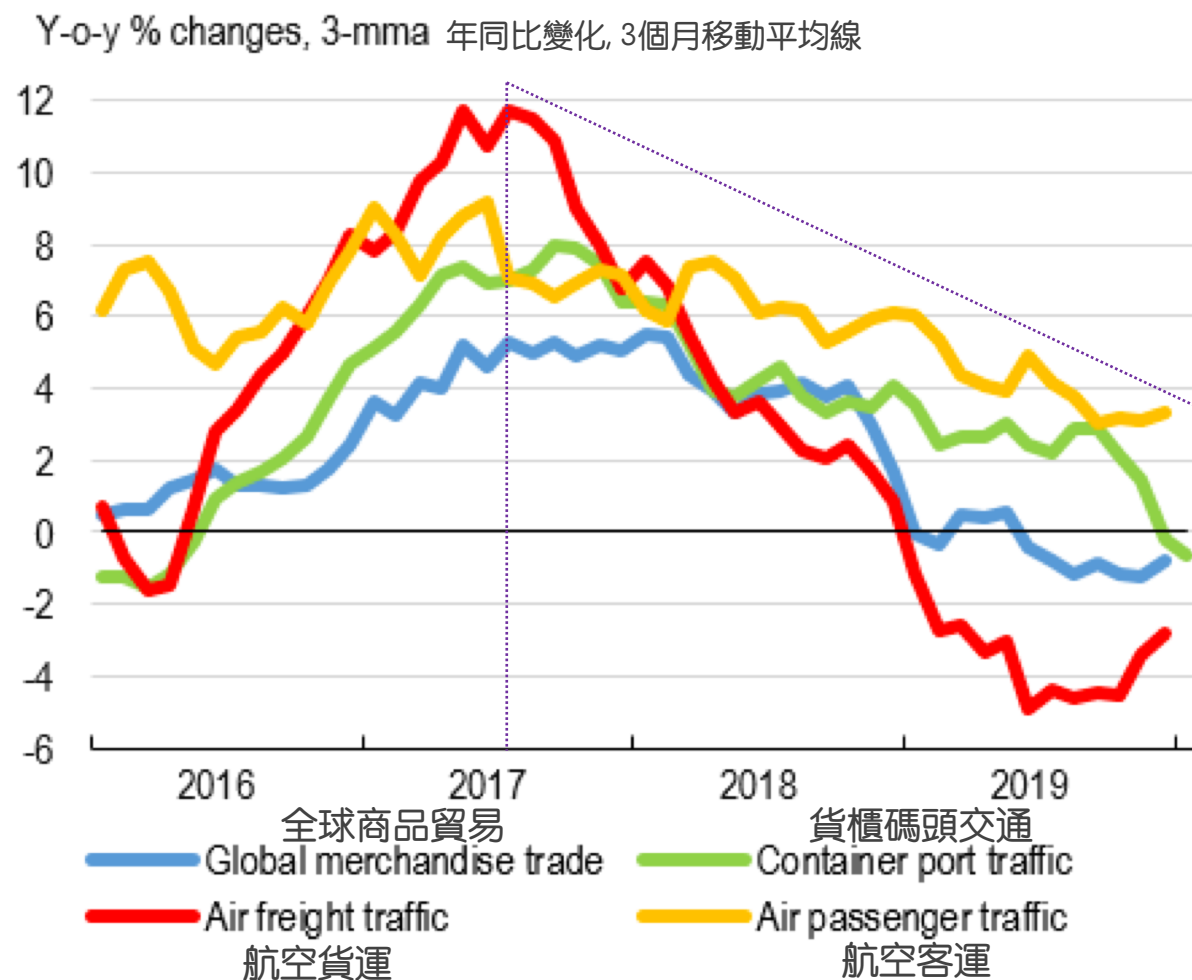
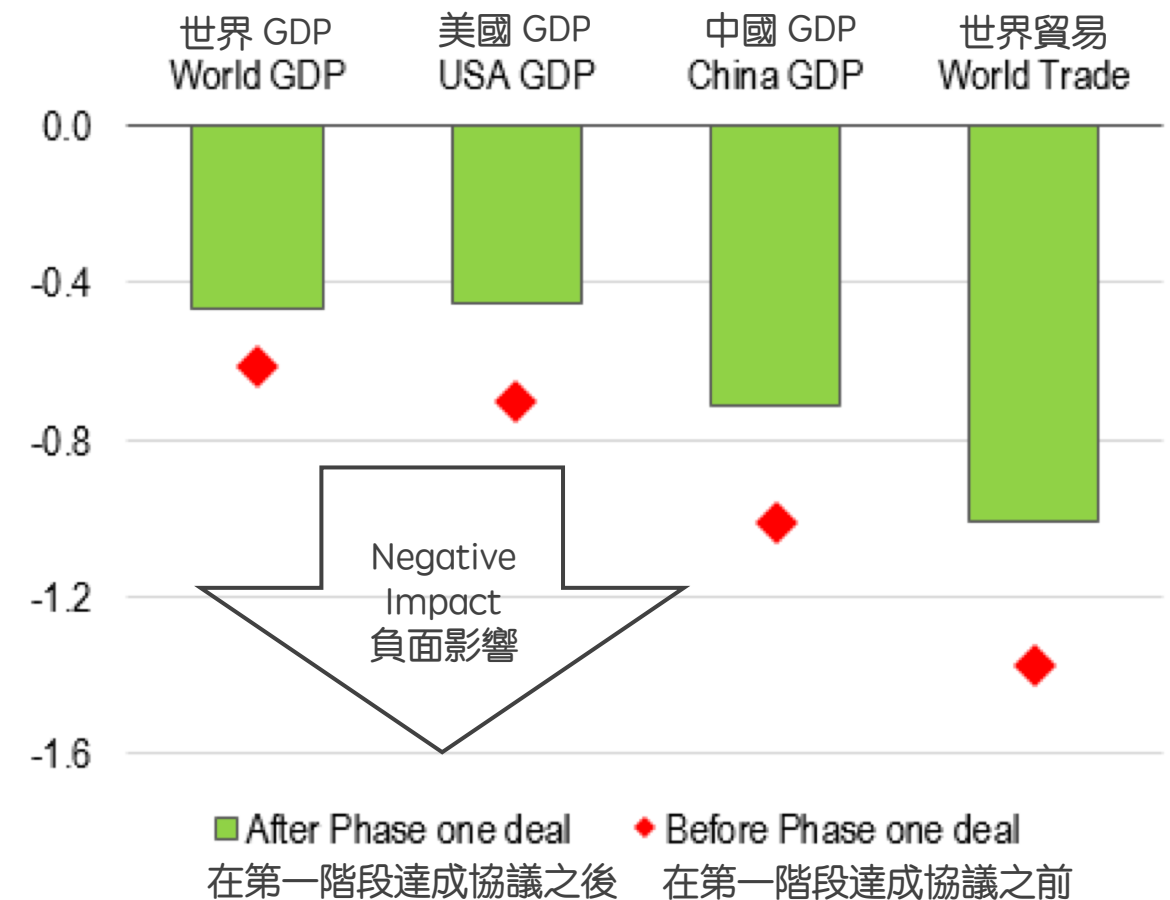


圖 4: 中美貿易緊張局勢的影響  
與基線 2021-22 的百分比差異  
Figure 4: Impact of US-China Trade Tensions  
% difference from baseline 2021-22



Source: *Interim Economic Outlook Assessment (2020)*, The Organisation for Economic Co-operation and Development, March 2020.

# The Importance Role of China Travel Visitors in GDP by Country/Region 中國遊客對國家/地區 GDP 的重要性

圖 5：來自中國的國際遊客

Figure 5: International Visitor Arrivals from China

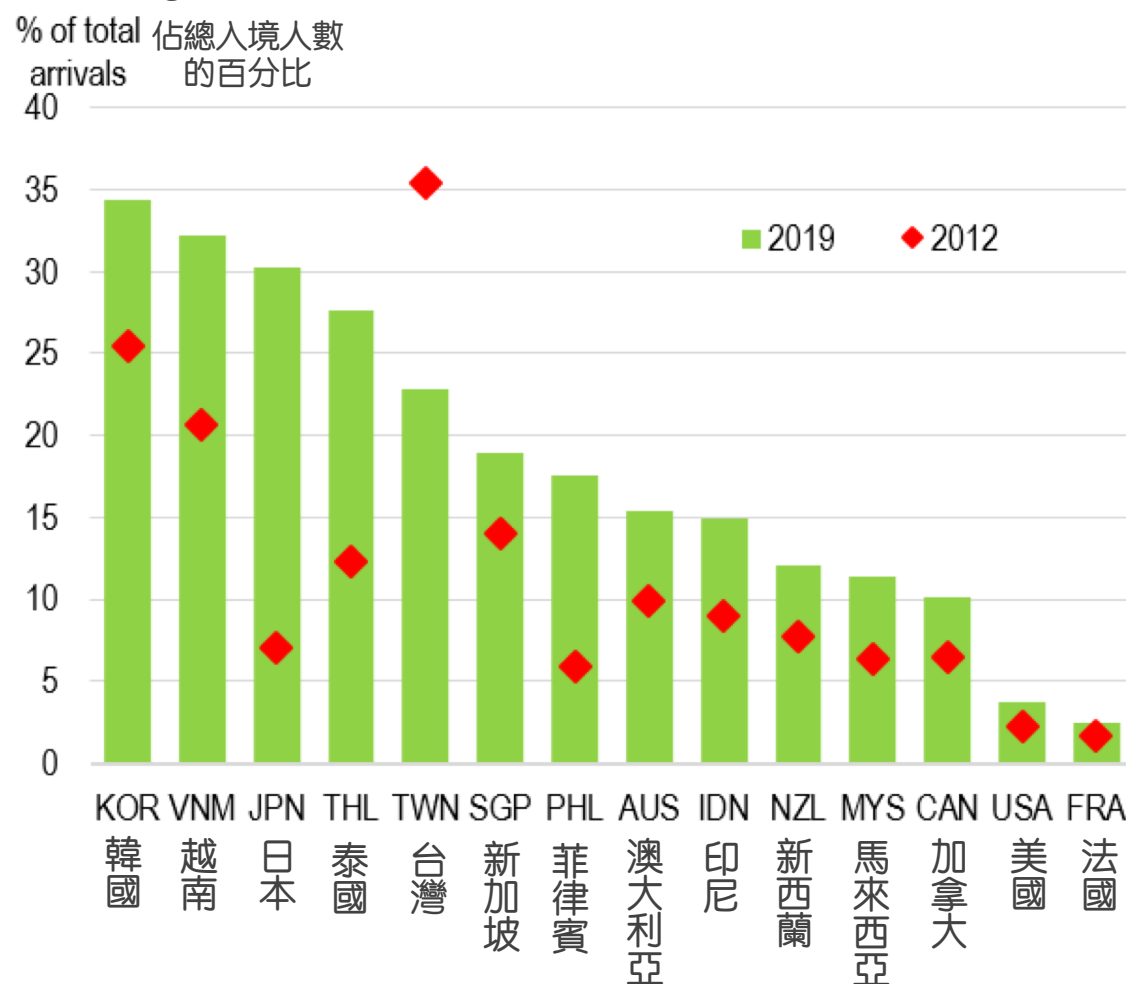
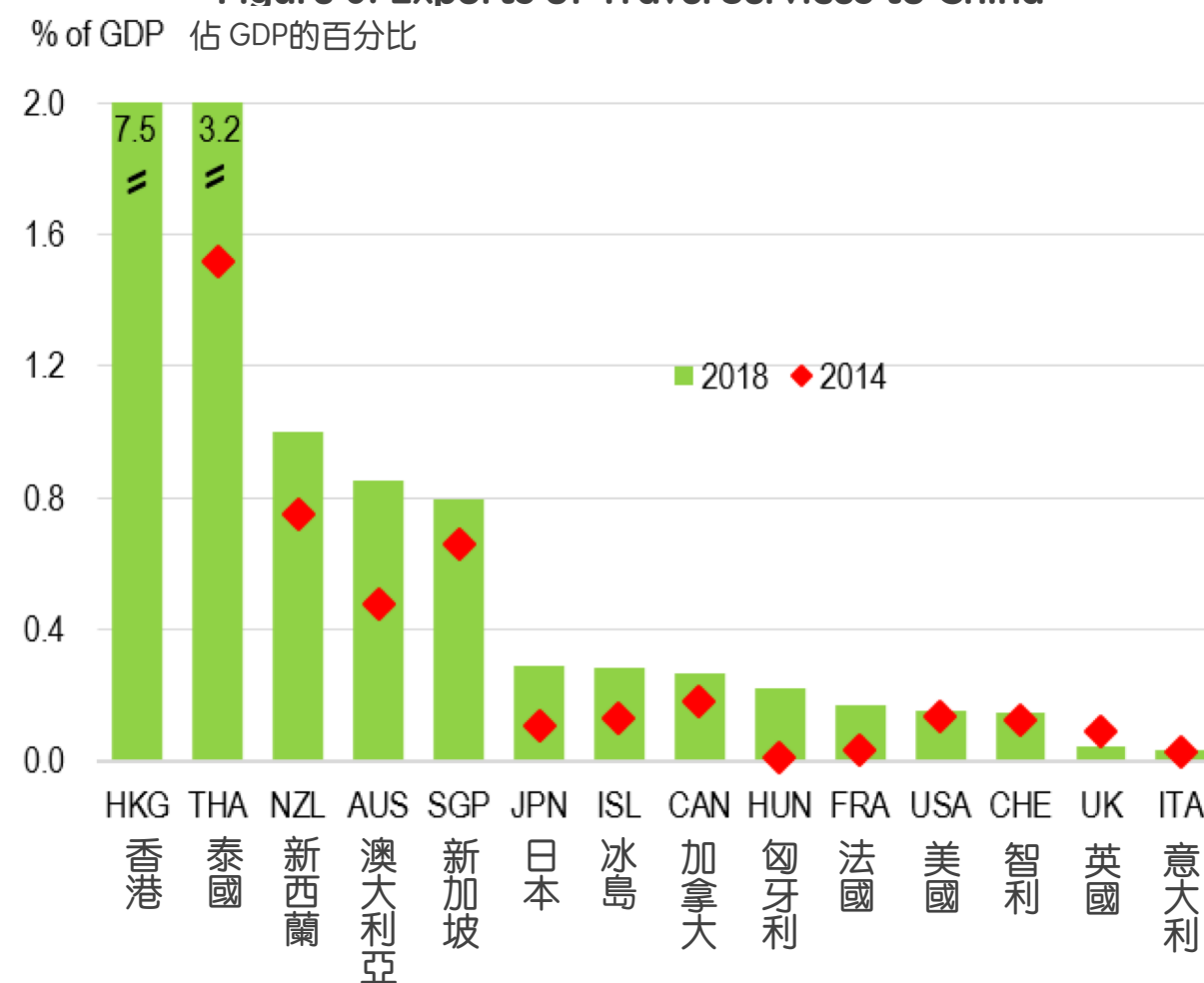


圖 6：對中國的旅遊服務出口

Figure 6: Exports of Travel Services to China



Source: *Interim Economic Outlook Assessment (2020)*, The Organisation for Economic Co-operation and Development, March 2020.

## 2. When Will the Coronavirus Outbreak End? 討論與分享: 新冠狀病毒爆發會何時結束?

1. Optimistic assumption 樂觀假設

1. 將在 1-2個月內減緩或消失

2. Most likely assumption 最可能的假設

2. 將在 3-6個月內減緩或消失

3. Pessimistic assumption 悲觀假設

3. 將在 1-2年內減緩或消失



## Emerging Consumption Trends on Coronavirus 討論與分享: 冠狀病毒的新興消費者趨勢

資料來源: 東方線上消費者紙研究集團/專業經理人調查, n=551, 2019 新型冠狀病毒市場衝擊 (專業經理人面)

### 疫情影響消費情境的可能機率

- 疫情或許重塑消費行為, 專業經理人們認為「消費市場各種情境」可能的發生同意%...



**79%**

傾向透過網路  
操作金融相關交易



**67%**

增加在網路購買  
生鮮食品



**82%**

習慣在網路上  
購買家庭日用品



**72%**

傾向透過  
外送平台訂購餐點



**61%**

減少出國  
安排與規劃



**89%**

抗菌產品成為  
日常生活必備品



**45%**

知名品牌  
更具有影響力



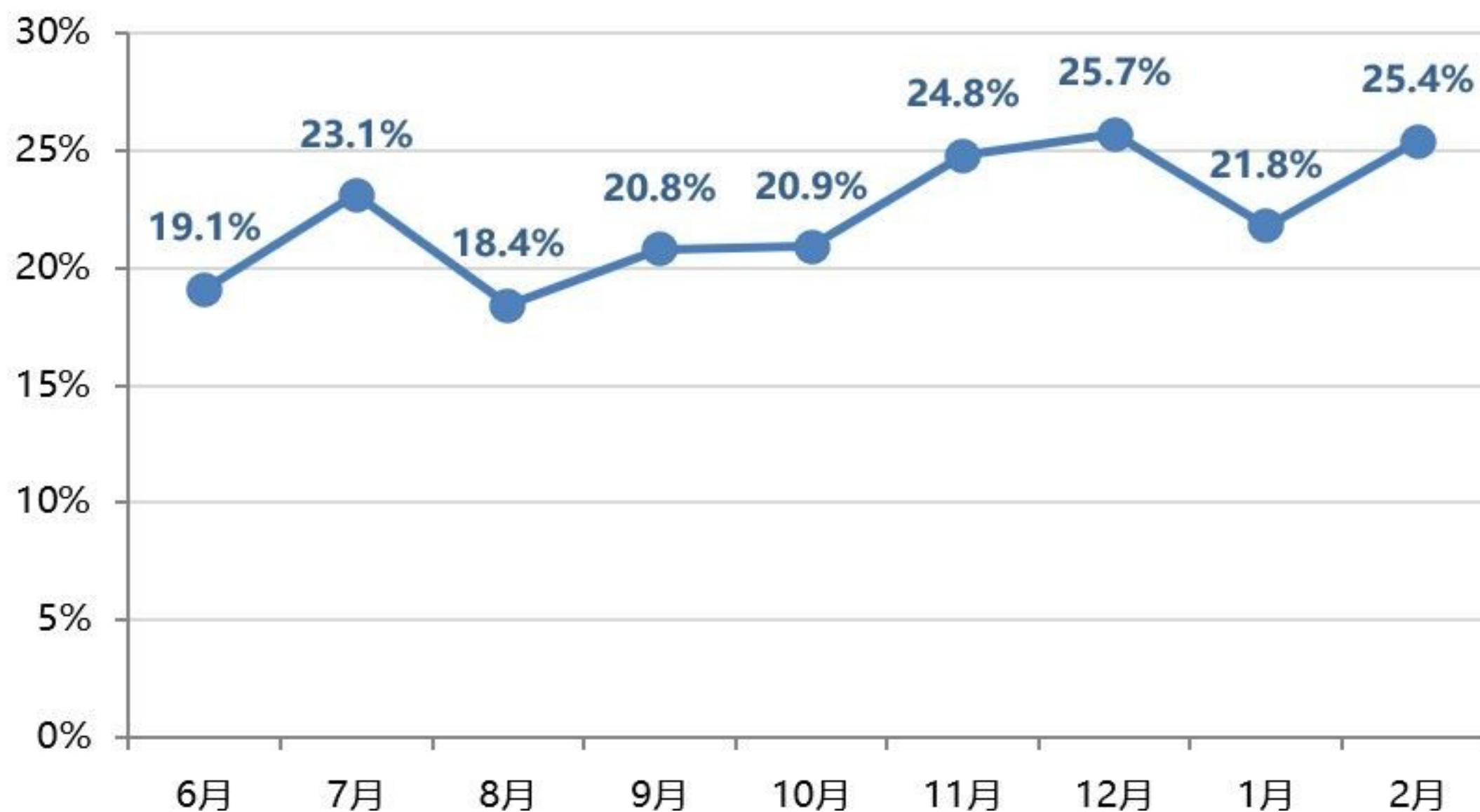
**79%**

增加日常生活用品  
安全庫存量

## Consumption Trend (On-Line Purchase) 消費趨勢 (網上購買)

資料來源：東方線上自主調查

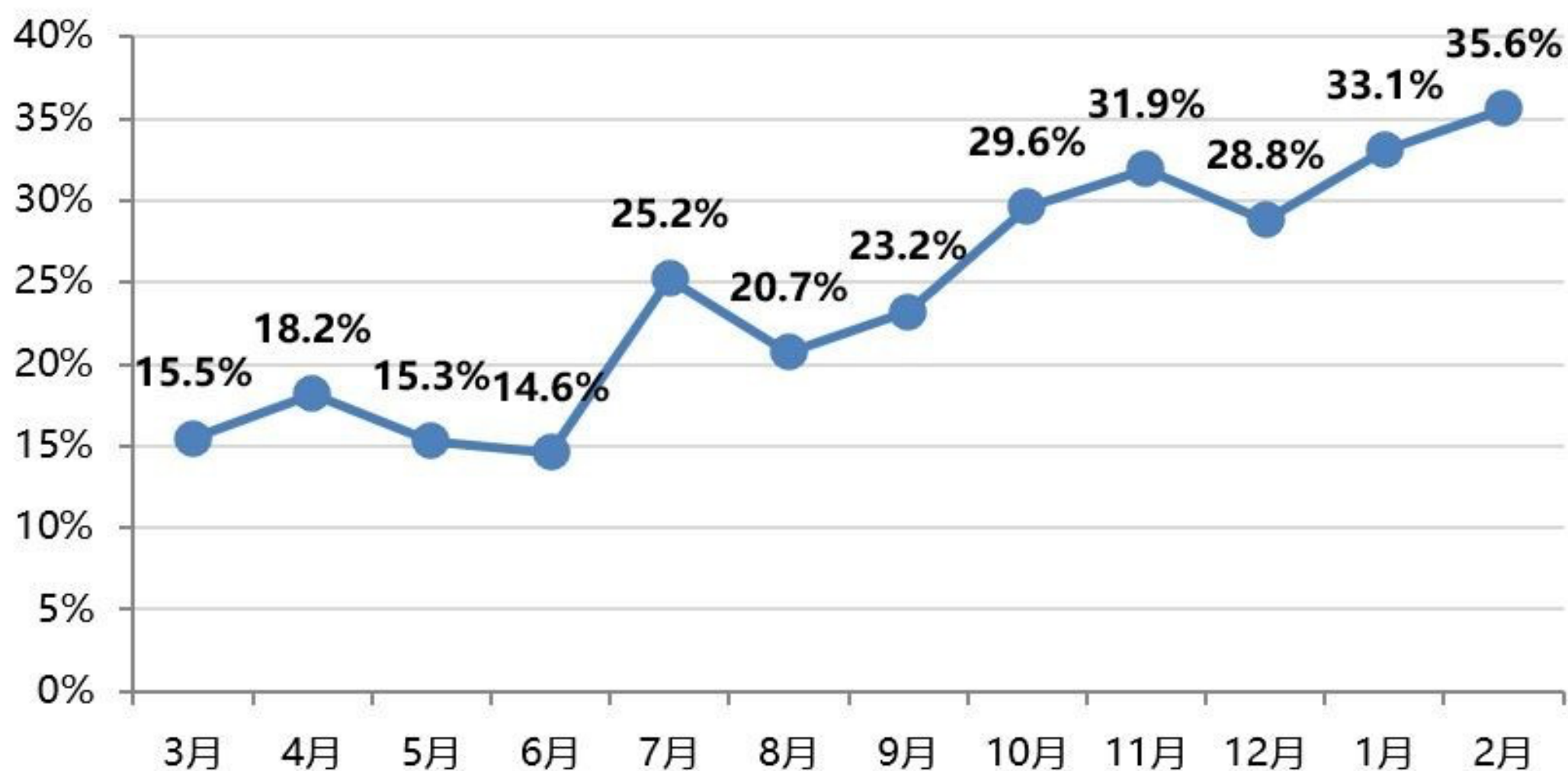
### 當月曾使用線上購物退貨服務的人數比例



## Consumption Trend (Outdoor Buy) 消費趨勢 (外買)

資料來源：東方線上自主調查

當月曾使用美食外送平台的人數比例，  
如：Uber Eats、foodpanda、戶戶送



## 2. New Revelation of Capitalism: Creative Destruction 資本主義的新啓示：創造性破壞

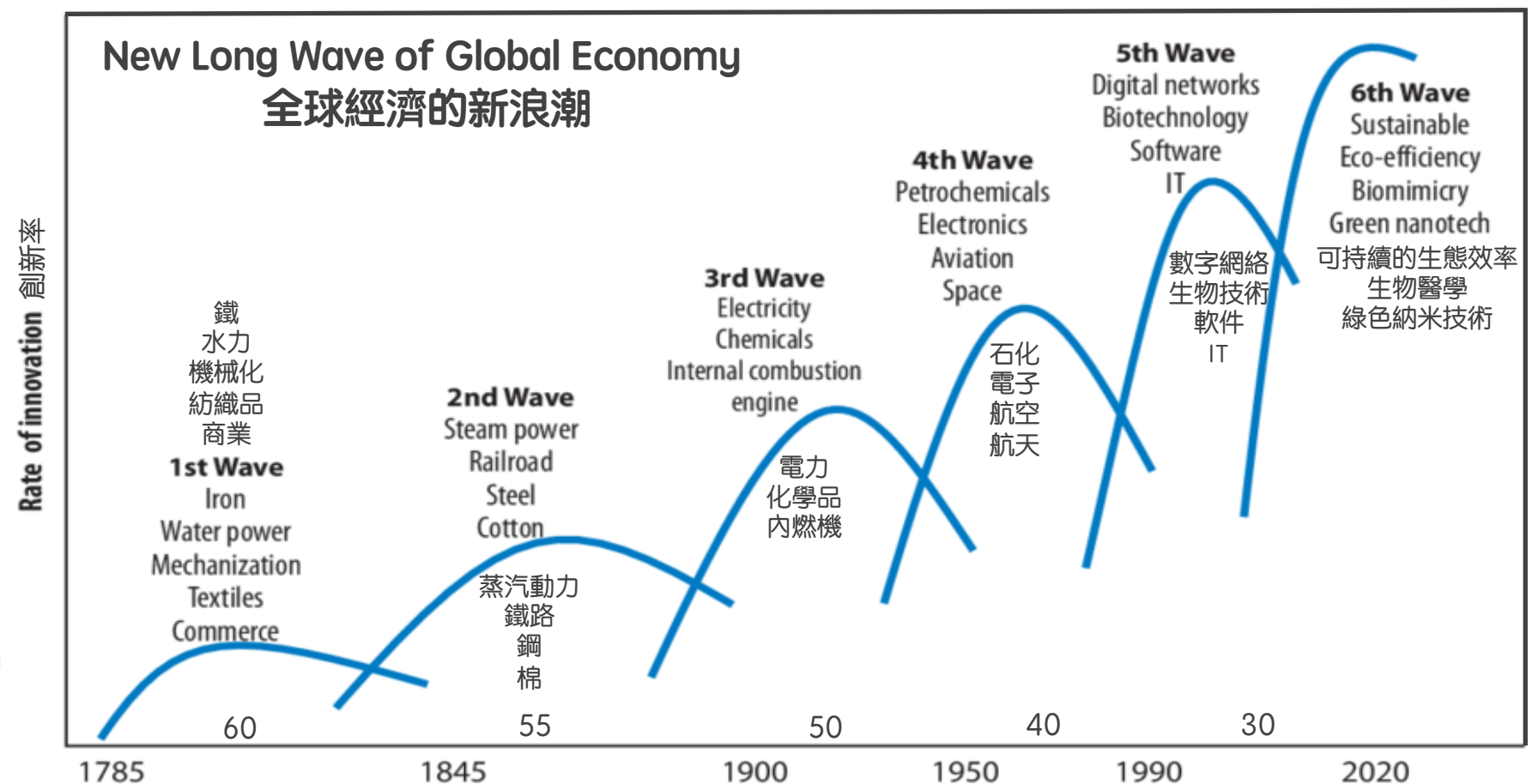
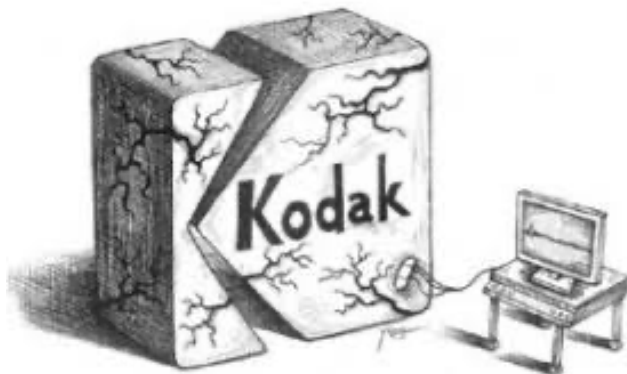
Source: Joseph A. Schumpeter (1943), *Capitalism, Socialism & Democracy*, Routledge.

Leo Nefiodow, Simone Nefiodow (2017), *The Six Kondratieff: A New Long Wave in the Global Economy*, Sankt Augustin, Germany.

Schumpeter (1943, p.84) describes creative destruction as the "process of industrial mutation that incessantly revolutionizes the economic structure from within, incessantly destroying the old one, incessantly creating a new one. This process of Creative Destruction is the essential fact about capitalism. It is what capitalism consists in and what every capitalist concern has got to live in".

熊彼特將創造性破壞描述為“工業突變的過程，它不斷地從內部對經濟結構進行革命，不斷地破壞舊的結構，不斷地創造新的結構。這一創造性破壞的過程是資本主義的基本事實，這也是資本主義的本質以及每一位資本家都必須存在的擔憂”。

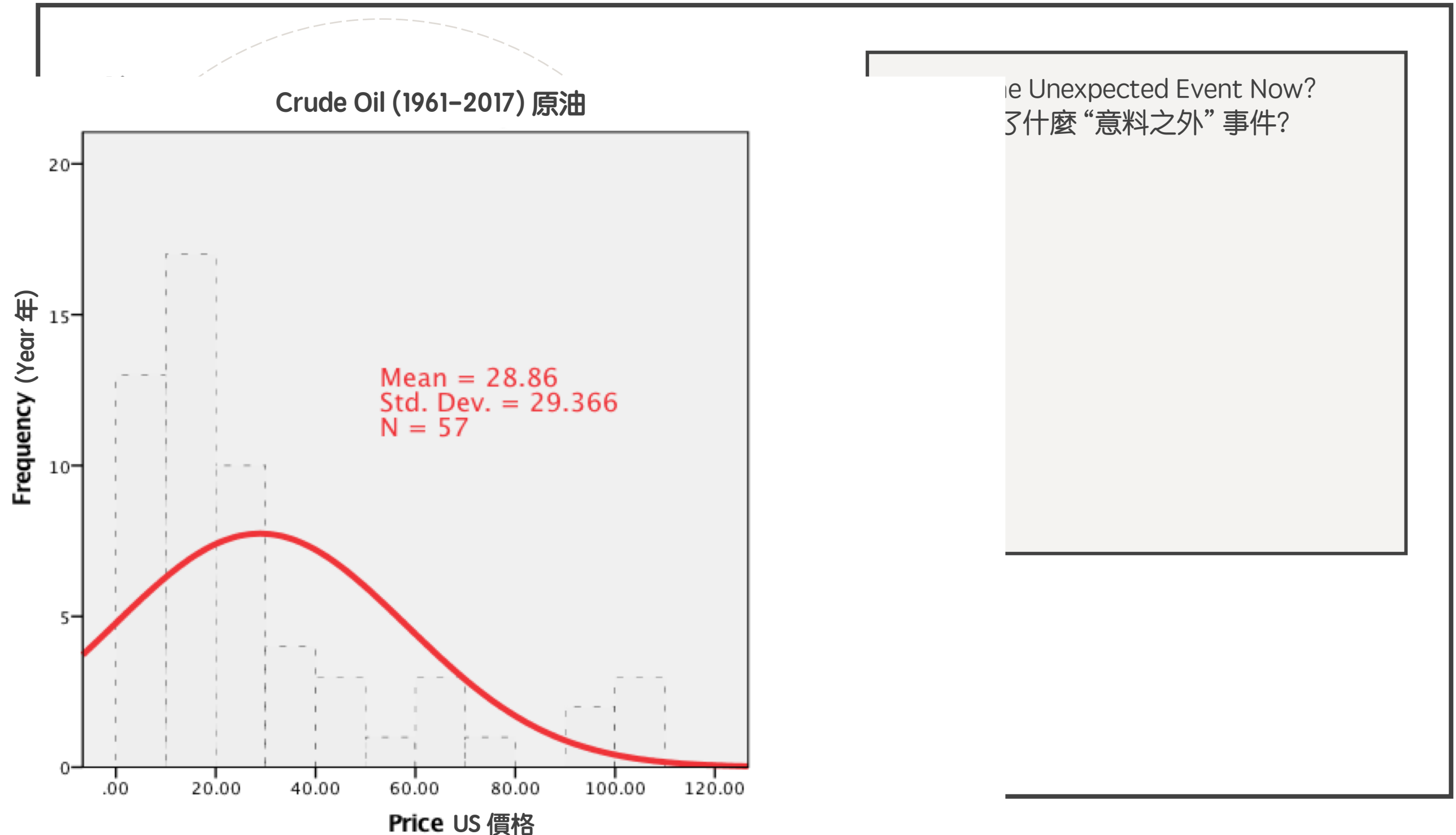
Have You Never Thought  
Kodak Bankruptcy?  
您從未想過柯達破產嗎?



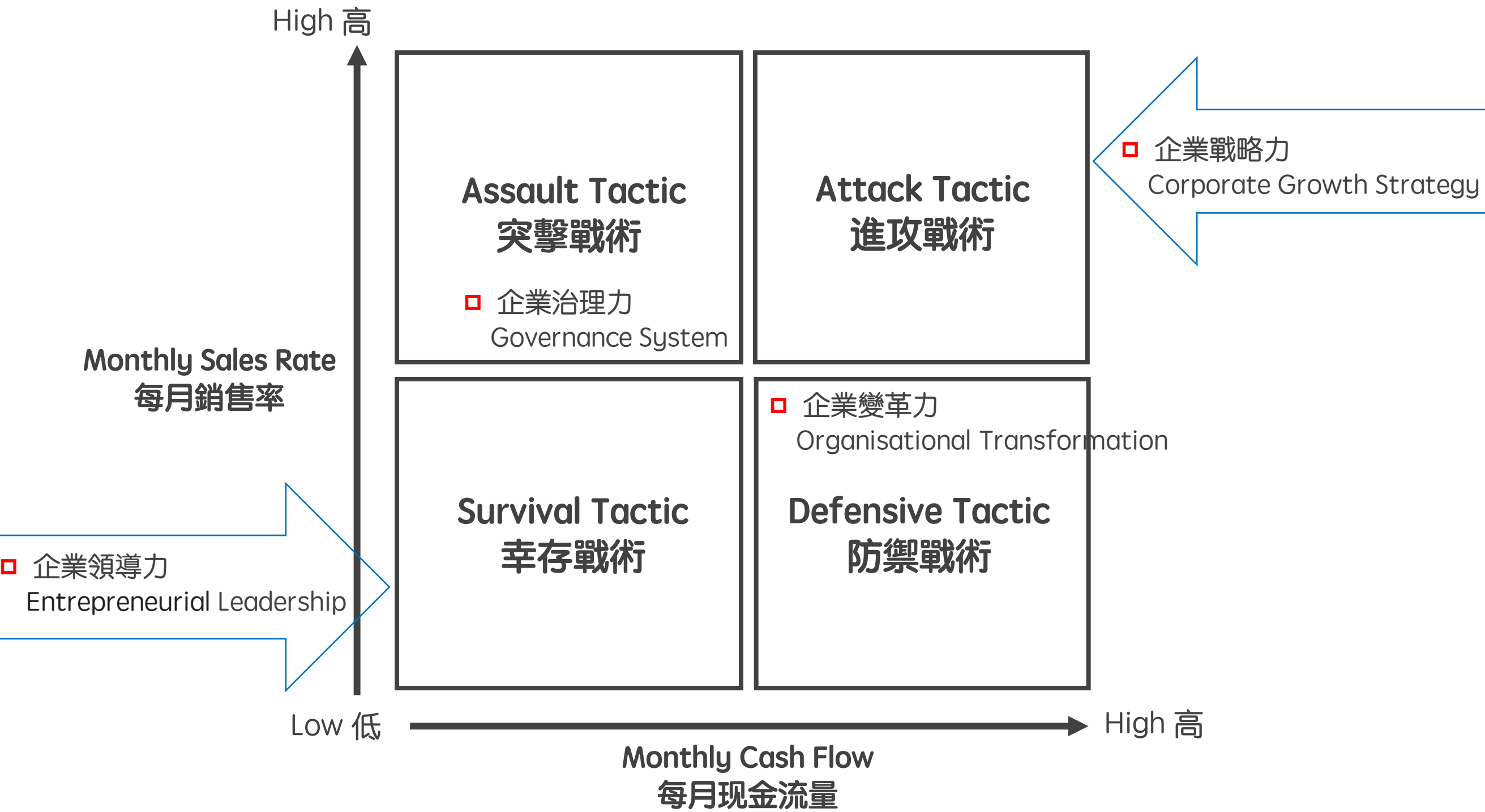


### 3. Entrepreneurs and gamblers: Opportunities 賭企業家和賭徒：機遇

Source: Nassim Nicholas Taleb (2007), *The Black Swan*, Random House, New York.



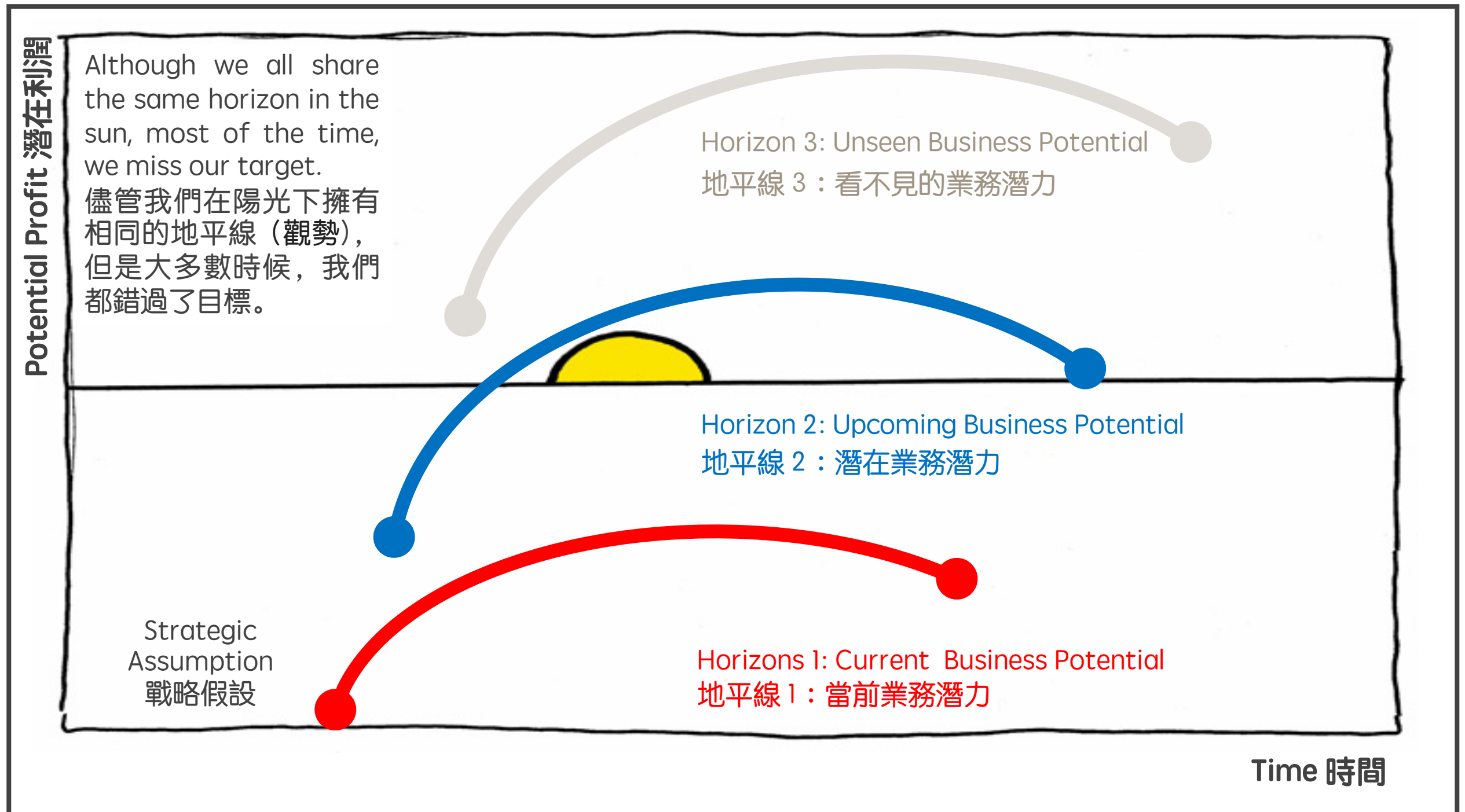
# Survival or Growth in Market Chaos 在市場大混亂中生存或增長



## 4. Mastering Skills: Observing the Trend

### 掌握技巧：觀勢

Source : Gerry Johnson, Kevan Scholes and Richard Whittington (2008), *Exploring Corporate Strategy*, Prentice Hall.



# Survival for the Fittest, Not the Strongest in Turbulent World !

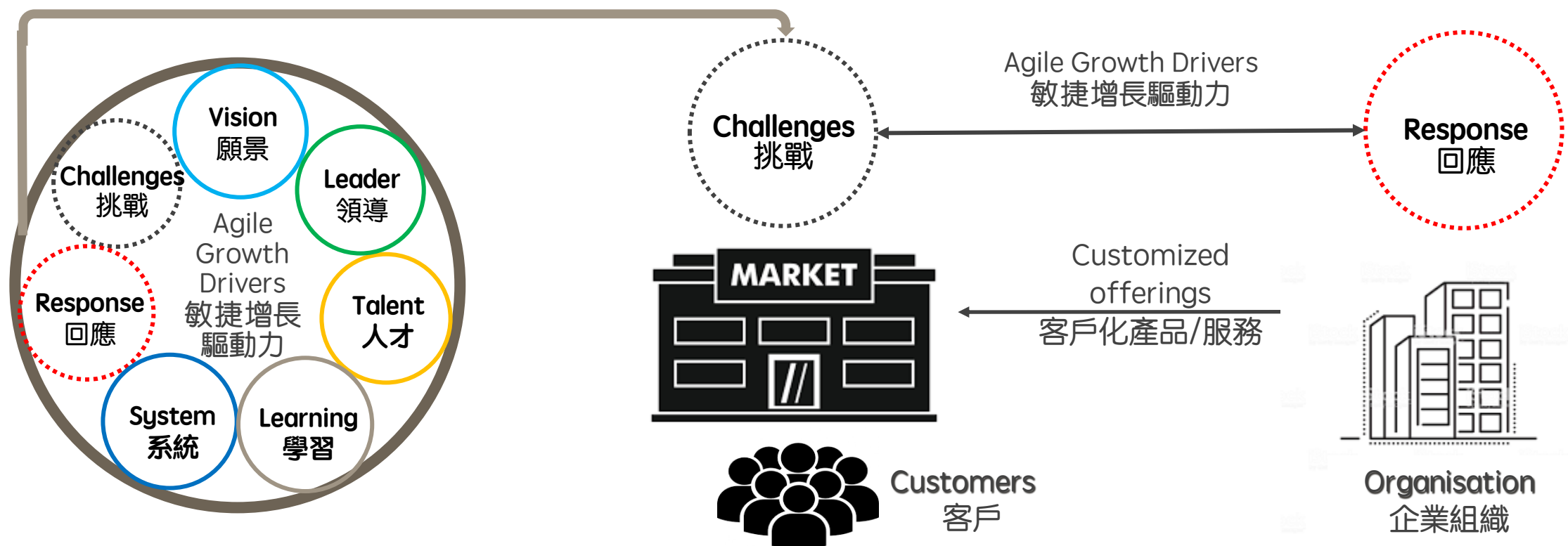
## Becoming a Agile Organisation

### 在動盪世界中適者生存，不是最強者！成為敏捷型組織

An Agile Organisation is one that is quick in responding to changes in the marketplace or environment. The 'agile organisation' is also known as 'the entrepreneurial organisation' and 'the resilient organisation' and this kind of organisation focuses on the customer which calls for customized rather than standardised offerings.

“敏捷型組織”是一種能夠快速回應市場或環境變化的組織。“敏捷型組織”又稱為“企業家組織”和“彈性組織”，這種組織專注於需要定製而非標準化產品的客戶。

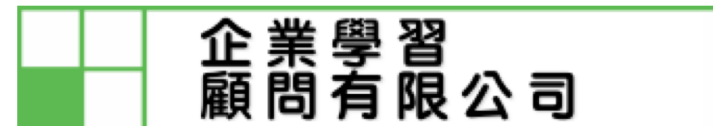
(<https://www.mbaskool.com/business-concepts/it-and-systems/6703-agile-organization.html>)





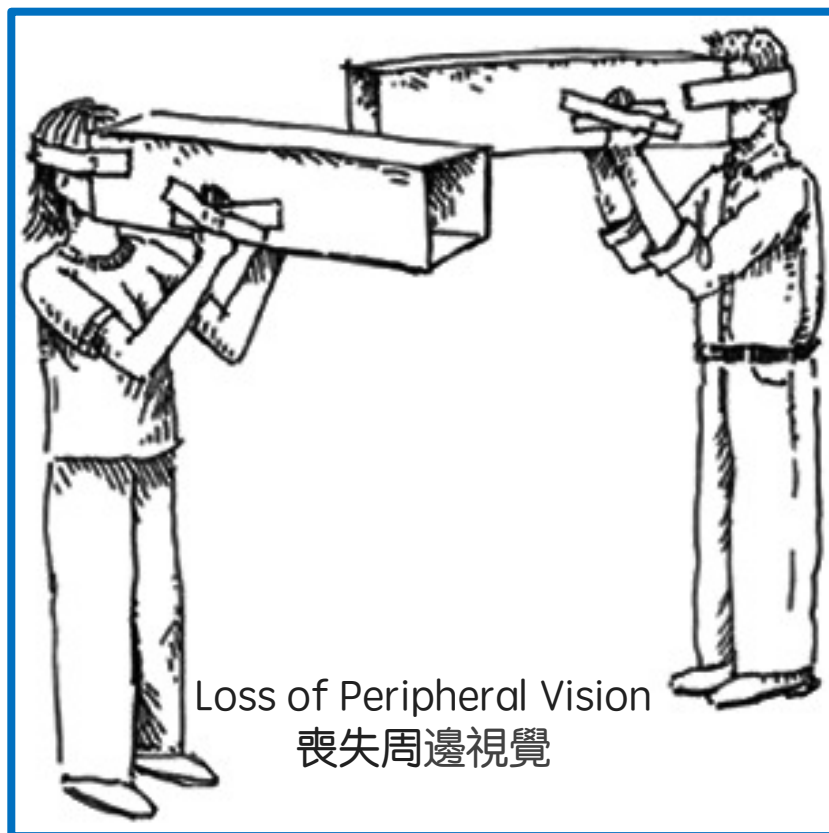


If you have query, please contact with Dr. Joe Leung.  
如有疑問，請聯絡 梁永忠 博士。



激活老化文化 建立學習型組織

### Tunnel Vision 隧道視覺



### 諮詢服務

- ❑ 企業戰略力 Corporate Growth Strategy
- ❑ 企業領導力 Entrepreneurial Leadership
- ❑ 企業治理力 Governance System
- ❑ 企業變革力 Organisational Transformation

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