

An Analysis of Macau's Film Industry Policy—Based on the Dual Perspectives of Policy Tools and Value Chain to Resolve

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Abstract: Looking back on the development of Macao's film industry, although it has a long history, it has always been obscure. After the handover, in order to promote the development of the local film industry, the SAR Government has been actively improving relevant policies and expanding regional co-operation. Nowadays, under the new situation of Guangdong-Hong Kong-Macao Greater Bay Area integrating the industry and joining forces to create a "Greater Bay Area Film", how to form a synergy through policies to promote quantitative and qualitative breakthroughs in the film industry is a topic that every Macao filmmaker needs to face as an important part of the regional integration process. This study takes Macau's existing film industry policies as a sample, and by quantitatively analysing the textual coding of the policies, establishes a two-dimensional analytical framework based on the perspectives of policy tools and film value chain, and points out the shortcomings of the industrial policies and makes suggestions.

1. Introduction

Although Macao's film industry has a history of more than a century, there has always been an imbalance in the development of various links in the industry chain. In recent years, against the backdrop of a series of policies to promote local economic and cultural development, Macao's film industry has also responded to the call to actively promote the industry's development in practice and build an industrial picture in exploration. From the perspective of policy tools, this paper attempts to take Macau's existing film industry-related laws and policy measures as samples, and conducts a quantitative and systematic analysis by collating and coding the policy texts, pointing out the inadequacies of the industrial policies and then proposing targeted suggestions for improving the policies.

2. Research Design

2.1. Research Methodology

Starting from content analysis, this paper attempts to collect and collate the relevant laws and regulations and policy measures of the film industry after Macao's handover, to dismantle and

analyse the complicated textual materials, to transform them into quantifiable texts with structure, and to present the analysis results in the form of frequency in order to explore the applicability and reasonableness of the policies of the film industry.

2.2. Sample Selection

2.2.1. Policy Search

Government portals were the main focus. Focusing on the Official Gazette of the Macao Special Administrative Region Government, it involves how Macao's cultural industry is integrated into the overall development of the country while at the same time referring to the relevant documents on the websites of the mainland governments at all levels. All policy texts listed in this paper are derived from publicly available data. The deadline for searching is 10 August 2022.

2.2.2. Text Selection

In terms of policy level, not only the policies and laws enacted by Macao, but also the policy texts at the national level and other local levels that are closely related to Macao, are selected. In terms of policy content, apart from focusing on laws and regulations directly related to Macao's film industry, the perspective is also broadened to focus on cultural industry policies. In addition, since the cultural economy is an important part of the real economy, policies related to the Macao film industry in the economic strategy are also included in the selection of texts. Regarding the types of policies, laws and regulations, plans, agreements, opinions, (provisional) measures, frameworks, etc. were mainly selected. Through the above three steps, the comprehensiveness and accuracy of policy selection are ensured. After finishing, this paper finally selected a total of 22 effective policy samples, limited to space, the text of the specific policies will not be listed in the text details[1] .

2.3. Analysis Framework

2.3.1. X-dimension: basic policy tools

This study analyses Macau's film industry policy in the three dimensions of supply-type policy instruments, environment-type policy instruments and demand-type policy instruments, based on the policy instrument framework proposed by Rothwell and Zegveld in 1984, which is divided into areas of influence or objects of action. According to the above definition, this paper summarises the types of policy instruments used in the 22 selected Macau film industry policies, and the results are shown in Table 1.

Table 1: Types of Policy Instruments for the Macao Film Industry

| Types and meanings of policy instruments | | |
|--|----------------------------------|--|
| form | Policy tools | define |
| supply-based | cultivation of talent | Measures and plans formulated by the relevant government departments on the cultivation of film talents in accordance with the needs of the development of the Macao film industry. |
| | Financial support | (b) Direct financial support provided by the Government to the various stages of the film industry value chain. This includes the establishment of special funding funds, financial subsidies and financial support, etc. |
| | infrastructure work | Establishment of platforms for industry-university-research co-operation, film studios, film bases, trade platforms, film and television exchange and co-operation bases, and the establishment of industry clusters, etc. |
| | public service | Other supporting services required by the film industry provided by the Government |
| | Technical Support | Government's policy to support the development of Macau's film industry by providing various technologies. |
| | Information support | Relevant government policies to encourage and facilitate the flow of information between Macau's film industries. For example, the establishment of information exchange platforms, business matching platforms, etc. |
| demand-based | government demand | Direct government demand for film products in the formulation of plans, measures, etc. |
| | Regional cooperation | The Government and relevant departments to stimulate demand and promote the development of Macao's film industry by formulating relevant measures for Macao's film industry co-operation with the Mainland and the rest of the world |
| | promote the use of sth. | Policy measures such as promotion and application taken by the government to expand the demand for film products. Such as Film festivals/exhibitions, film tourism, etc. |
| | Outstanding Talents/Projects | Policies and measures formulated by the Government and relevant departments to meet the demand for Macau's outstanding talents and projects in film and television. |
| environmental | legal system | Laws and regulations, regulatory system, and normative measures related to Macao's film industry |
| | Intellectual Property Protection | Improving and strengthening policies related to the protection of intellectual property rights in Macao's film industry |
| | target planning | Based on the development needs of Macau's film industry, the overall layout and planning of the objectives and vision to be achieved are outlined. |
| | fiscal policy | Government policies on the Macau film industry in terms of finance, treasury, related expenses, etc. |

2.3.2. Dimension Y: Film Value Chain

The value chain theory was first developed by economist Porter. According to him, the value chain of an industry refers to the collection of activities that include "designing, producing, marketing, delivering and supporting the product." This theory has also been applied to the study of the film industry. Based on the results of the previous research, this paper classifies the value chain of Macau's film industry into production, distribution, and classification [In order to achieve the purpose of educating and guiding the public, and to safeguard public morals and good customs, Macau adopts an age-specific approach to classify public screenings and performances: Category A is suitable for young and old; Category B is not appropriate for those under the age of thirteen; Category C is not appropriate for those under the age of eighteen, and is prohibited to be viewed by those under thirteen; and Category D is prohibited to be viewed by those under the age of eighteen.

D: No one under the age of 18 is allowed to see the film.] , screening, marketing and post-film six segments[2] .

2.3.3. Dimension X-Y: Policy Instruments - Film Value Chain

Based on the X-dimension and Y-dimension of the above policy tools analysis framework, a two-dimensional framework for the analysis of Macau's film industry policies is constructed accordingly, and the relationship between the role of policy tools on the film value chain is shown in Figure 1.

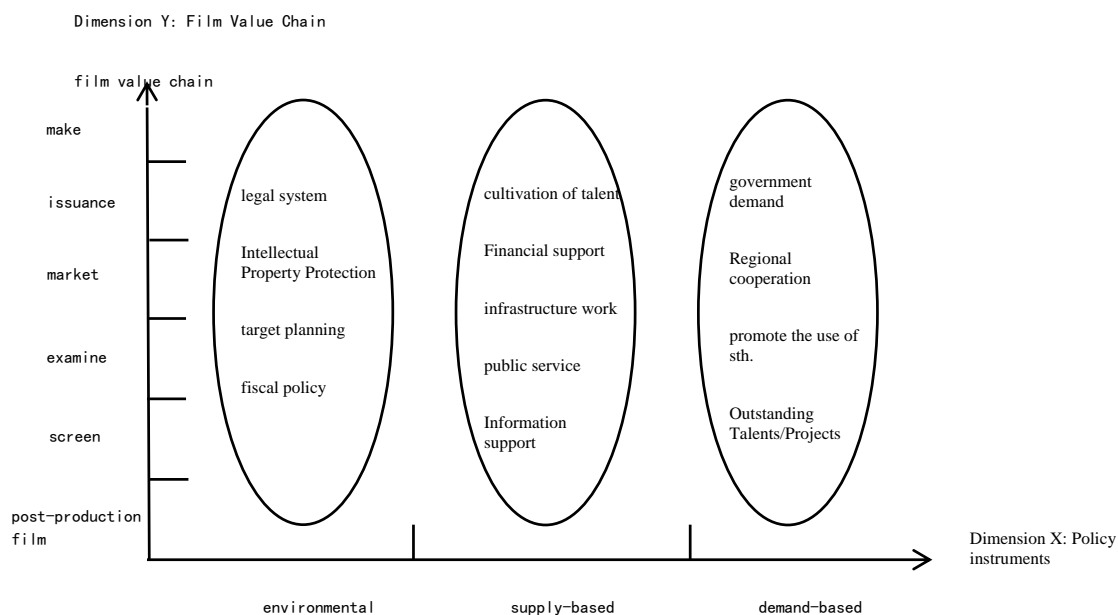


Figure 1: A two-dimensional framework for analysing Macau's film industry policy

2.3.4. Research steps

Based on the two-dimensional analysis framework constructed in the previous section, the content analysis categories in this paper correspond to it, i.e. the same policy text is grouped and analysed according to the policy instrument and the film value chain respectively. The steps are as follows:

In the first step, the 22 selected texts of Macao's film industry policies were coded in the first round according to the year of their issuance.

In the second step, each clause in each policy text was coded in a second round according to the policy content[3].

In the third step, the coded policy texts were categorised and counted according to the policy instrument dimension, and a policy text was coded more than once if it could be counted in different policy instruments at the same time.

In the fourth step, based on the above classification and statistics, the policy text is then summarised and documented according to the industrial value chain dimensions.

3. Analysis of the results of the study

3.1. Overall frequency statistics

The frequency and number of policies issued reflect, to a certain extent, the importance the

government attaches to the film industry. In terms of the frequency and number of policies issued, Macao has started to pay attention to the development of the film industry since 2011, with a total of 4 policies issued during the 12th Five-Year Plan period from 2011 to 2015, and 10 during the 13th Five-Year Plan period. Among them, 5 policies will be issued in 2019, promoting the development of Macao's film industry from the construction of a comprehensive service platform for film and television, to subsidies for the growth and development of film and television enterprises, as well as the exchange and training of talents, etc. 3 policies will be issued in 2020, involving film production, regional cooperation, the construction of film and television bases, etc. (as shown in Figure 2).

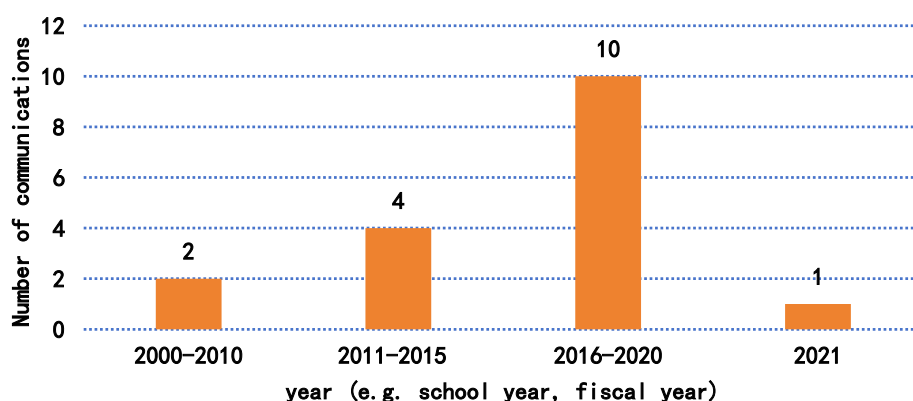


Figure 2: Changes in the number of policy issuances on Macao's film industry after the handover

The frequency and number of policy releases are closely related to the current development of the film industry, as well as the objectives and plans of the Macao Government and the overall layout of the Central Authorities; since 2006, the SAR Government has launched a strategic plan to promote the diversified development of the industry, guided by the development objective of "Promoting the moderate diversification of Macao's economy" set forth in the 11th Five-Year Plan. Since 2006, the SAR Government, under the guidance of the development objective of "promoting the moderate diversification of Macao's economy" proposed in the 11th Five-Year Plan, has initiated the strategic plan of promoting the diversification of industries. Immediately after, in the 12th Five-Year Plan, this policy guideline was emphasised again and continued to be implemented: in 2010, the SAR Government formally launched the promotion and development of Macao's cultural industry; in 2013, the Macao Cultural Industry Fund was set up; and in 2014, the "Policy Framework for the Development of the Cultural Industry" was released, which not only defines Macao's cultural industry development in terms of macro-positioning, but also in terms of its development objectives. In 2014, the Cultural Industries Development Policy Framework was released, which not only set the direction for the development of Macao's cultural industries in terms of macro positioning and development objectives, but also classified four core areas according to the characteristics of the industries, namely creative design, cultural exhibitions and performances, art collection and digital media, and made it clear that films belong to the digital media area, thus laying the groundwork for the actual implementation of the subsequent support policies. "During the 13th Five-Year Plan period, the Macao government has frequently supported the development of the film industry by implementing a number of policy measures and various support schemes related to the film industry, which shows that the government's understanding of the importance of the film development has been greatly improved, and that the development of the film industry is in the stage of steady advancement[4].

In addition, in terms of the use of policy tools, the 22 selected policies for Macao's film industry have used policy tools 179 times, with the environment-based policy tools being used most frequently, followed by the supply-based, and the least frequently used being the demand-based policies. Production is the industry segment where film policies are highly skewed, with nearly half of the policy tools being used in that segment. In contrast, insufficient attention has been paid to the remaining value chain segments. The analysis of the value chain dimension, a policy tool for the Macau film industry, is shown in Table 2.

Table 2: Macao Film Industry Policy Tool - Value Chain Dimension Analysis Table.

| Macao Film Industry Policy Tool - Value Chain Dimension Analysis Table | | | | | | | | | |
|--|------------------------------------|-------------------|-----------------|-------------------|--------------------|-------------------|----------------------|--------------------|--------------------|
| Policy tools | | film value chain | | | | | | | |
| typology | categorisation | producer | examine | issuance | market | screen | post-production film | macros | add up the total |
| environmental | regulatory control | 12 | 3 | 4 | 0 | 6 | 0 | 0 | 25 |
| | intellectual property rights (law) | 6 | 0 | 0 | 0 | 0 | 0 | 3 | 9 |
| | target planning | 12 | 0 | 1 | 5 | 0 | 3 | 17 | 38 |
| | fiscal policy | 3 | 0 | 0 | 0 | 0 | 0 | 2 | 5 |
| | Subtotal | 33 | 3 | 5 | 5 | 6 | 3 | 22 | 77 (43.0 per cent) |
| demand-based | government demand | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 4 |
| | Regional cooperation | 13 | 0 | 3 | 0 | 6 | 0 | 5 | 27 |
| | promote the use of sth. | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 2 |
| | Outstanding Talents/Projects | 5 | 0 | 1 | 0 | 0 | 0 | 0 | 6 |
| | Subtotal | 22 | 0 | 4 | 2 | 6 | 0 | 5 | 39 (21.8 per cent) |
| supply-based | cultivation of talent | 5 | 0 | 0 | 0 | 0 | 0 | 2 | 7 |
| | Financial support | 7 | 0 | 1 | 4 | 0 | 0 | 3 | 15 |
| | infrastructure work | 5 | 0 | 0 | 0 | 0 | 1 | 3 | 9 |
| | public service | 3 | 0 | 1 | 6 | 0 | 1 | 10 | 21 |
| | Technical Support | 3 | 0 | 0 | 0 | 0 | 0 | 3 | 6 |
| | Information support | 1 | 0 | 0 | 1 | 0 | 0 | 3 | 5 |
| | Subtotal | 24 | 0 | 2 | 11 | 0 | 2 | 24 | 63 (35.2 per cent) |
| add up the total | | 79 (44.1 percent) | 3 (1.7 percent) | 11 (6.1 per cent) | 18 (10.1 per cent) | 12 (6.7 per cent) | 5 (2.8 per cent) | 51 (28.5 per cent) | 179 |

3.2. Dimension X - statistical analysis of policy instruments

In terms of policy instrument dimensions, environmental policy instruments are used most frequently and demand-based least frequently.

Among the environmental policy tools, regulatory control and target planning are the main ones. The development of Macao's film industry is weak and not yet on a large scale, and many of the laws and regulations related to the film industry are scattered and not yet systematic. Among the specific policy provisions, the target planning policy is mainly expressed as the overall layout and planning of the goals and visions to be achieved by the development of the Macau film industry. Since 2011, every film industry policy issued by the Macao government has included the layout, planning and objectives of development, which on the one hand reflects the importance the government attaches to the development of the film industry, and on the other hand implies that the development plan and concrete plans of the Macao film industry have been initially established, and that the film industry has entered into the initial stage. In addition, intellectual property rights and financial policies account for a relatively small proportion, indicating that the existing policies lack

incentives for the protection of intellectual property rights as well as financial, tax and other related economic policies for the Macau film industry[5].

Among the supply-oriented policies, the public service category accounts for the highest proportion of policy tools, and in 2010, after the SAR Government officially launched the promotion and development of the cultural industry, the various plans, arrangements and agreements on the Macau film industry issued by the Cultural Affairs Bureau (CAB), the Cultural Industries Commission (CIC) and other relevant institutions all involved film public service content. The "Policy Framework for the Development of Cultural Industries" has even clearly stated the positioning of Macao as "a film exchange and service base with Macao's characteristics, focusing on the exchange and service of the film industry, supplemented by filming and production, as well as sightseeing and tourism, culture and entertainment, and recreation and holidays". Secondly, there is the financial support policy tool. Since the 12th Five-Year Plan, the Macao government has set up a number of film industry funding schemes, with the maximum amount of funding reaching MOP 34 million (Source: Cultural Affairs Bureau of the Macao SAR Government), and the subsidies are mainly non-reimbursable or interest-free. In addition, the use of supply-type policies in the infrastructure category accounts for 14.3%, mainly for the planning of industrial bases that are conducive to the development of Macau's film industry. In terms of talent cultivation policies, although the Macao government has continuously strengthened its efforts to cultivate, train and introduce film talents, the specific direction and methods of cultivating film talents have not been formulated in detail. In addition, the proportion of policies related to information and technical support issued by the government is relatively small.

The category of regional cooperation accounts for the highest proportion of demand-based policy instruments. As a nearly fully externally oriented micro-economy, Macao's high degree of external dependence determines that it is necessary to improve the effectiveness of its external contacts by strengthening the breadth and depth of regional cooperation in order to effectively promote the prosperity of the film industry. After the handover, exchanges and contacts between Macao and mainland provinces and cities as well as the Hong Kong SAR have been deepening. CEPA and its supplements, as well as the Pan-Pearl River Delta (PPRD) regional cooperation and the Guangdong-Hong Kong-Macao Greater Bay Area (GHMA) cooperation, have provided Macao's film industry with a new way out, a new platform and a new opportunity. On the international front, it is mainly the co-operation with Portuguese-speaking countries. Secondly, the Government also promotes the development of Macao's film industry through various measures in terms of outstanding film talents and film industry projects.

3.3. Dimension Y - Film Value Chain Dimension Statistical Analysis

Macao's film industry policy mainly focuses on the production segment of the value chain. As a weak link in the development of the film industry, Macao's film production industry lacks a variety of productions, as well as influential directors and celebrities, resulting in the lack of attractiveness of local film productions, which in turn leads to a weak market influence, and greatly restricts the development of the production industry. In recent years, the government has formulated a number of industrial policies to encourage and promote film creation, providing professional production guidelines on scriptwriting, filming and post-production, as well as financial support.

The distribution, post-film and auditing segments account for a relatively small proportion of the total. The SAR Government released the Special Funding Scheme for Film and Television Integrated Service Platform in 2019, which explicitly provides a venue for an integrated service platform for film and television. Macau's first company to provide one-stop services for film post-production and distribution, 1220 Film Production Company Limited, was then developed

under the policy support. The establishment of this film and television platform fills in the missing links of post-production and film distribution in Macau's film development. However, in general, it is difficult to rely on only one company to support the whole distribution business. In addition, under the vision of a large film industry, the value and importance of the post-film industry has become increasingly prominent. The Macau government has actively explored the extension of the value chain in light of the actual situation of the local community. It has created a series of cultural and tourism activities in the form of film and tourism, such as the "Follow the Movie Tour in Macau." Additionally, the government has proposed the construction of a "film exchange and service base that combines sightseeing and tourism, cultural entertainment, leisure, and holiday, and is distinctive to Macau." It has also put forward a design plan to build a "film exchange and service base with Macao characteristics that combines the functions of sightseeing, tourism, cultural entertainment, leisure, and holiday." However, these proposals are still in the exploration stage.

Other links in the value chain of Macao's film industry are covered by a small number of policies and from a single perspective. It is worth noting that the horizontal "Macro" column in the table mainly counts policies that are vague and general, and not specific in terms of macro content. According to statistics, the number of policies in this column accounts for 29.3% of the total number of policies in the table, which also shows that the policies of Macao's film industry have the disadvantages of unclear direction and weak operability.

3.4. Policy instruments and film value chain cross-cutting dimensions

The interpretation of the cross-cutting dimension of policy instruments and the film value chain is mainly based on the distribution of the horizontal value chain segments in the vertical policy instruments to be sorted out and analysed.

Policies for the film production industry in Macao are dominated by environment-based policy instruments, followed by supply-based and demand-based. Among them, the highest frequency of use is in the categories of regulatory control, target planning and regional cooperation, which on the one hand reflects the importance the government attaches to Macau's film production, and on the other hand shows that the production industry is mainly realised through the strategy of "distant communication and close integration", and the continuous strengthening of cooperation paths with the Mainland and Hong Kong, among others. Secondly, the proportion of financial support policy tools is also higher than others. The Cultural Affairs Bureau of Macao has introduced the "Feature Film Production Support Programme", which stipulates that the maximum amount of subsidy for each film is between MOP1.5 and MOP2 million, and the subsidy is mainly in the form of non-reimbursable subsidies. From this, we can see that the government has been promoting the development of film production in a way similar to "nurturing". However, the form of non-reimbursable subsidy, coupled with the limited amount of subsidy, makes it easy for the subsidised parties to ignore the market demand when creating films, and to complete the creation of films based on the director's personal preference, which results in films that cannot stand the test of the market, and thus may hinder the construction of a benign mode of operation for the industry.

The screening policy is an environmental policy tool, with legislation regulating the classification of Macao films.

The distribution and exhibition segments are mainly environmental and demand-based, and the use of policy tools is also focused on regulatory and regional cooperation. 2003 saw the promulgation of the Mainland and Macao Closer Economic Partnership Arrangement (CEPA), which initiated co-operation between Macao and the Mainland in terms of cinema services, Chinese-language films and co-productions distribution. With the continuous supplementation and improvement of CEPA, from "allowing the construction or renovation and operation of cinemas in the Mainland in the form of joint venture or cooperation" to "allowing the establishment of wholly-owned companies in the Mainland for the construction or renovation of a number of

cinemas in a number of locations", from "Allowed to be distributed and screened in Guangdong Province with the approval of the competent mainland authorities" to "Distributed in the Mainland without restriction on import quotas after examination by the competent mainland authorities" and "Hong Kong and Macao enterprises may apply for incentives for distribution and promotion of outstanding domestic films in Hong Kong, Macao, Taiwan and outside Hong Kong". Excellent domestic films can apply for incentives", etc., witnessing the deepening cooperation between Macao and the Mainland in the field of film industry. In contrast, supply-based policy tools are less frequently used in the distribution and exhibition segments, suggesting that the government has not intervened in all aspects of these two value chain segments and has failed to provide them with more comprehensive policy support.

The highest proportion of supply-based policy tools is found in the marketing chain. The government mainly relies on financial support and the provision of related services to promote the development of Macau's film publicity and promotion activities. This is followed by the target planning category of environment-based policy tools. Other policy tools are fewer in number or even absent, and the demand-type policy tools have the least coverage, implying that the government has not acted in a concerted manner to stimulate demand, nor has it provided sufficient strategic guidance for Macau's films to "go global". In addition, the frequency of the post-film policy tool is only 5 times, of which 3 times are for the target planning of the integration of Macau's film and tourism development, while most of the rest of the policy tool types are not covered, suggesting that the government is only at the exploratory stage of this area, which could be part of the future development efforts.

4. Research Conclusions

4.1. The basic structure for promoting the development of Macao's film industry has been formed

The top-level framework for the development of Macau's film industry has basically been formed under the auspices of the "Policy Framework for the Development of the Cultural Industry", with "two supports and two speed-ups" as the core. The existing policies basically cover all aspects of Macau's film industry, and from the perspective of policy tools, they basically intervene in all aspects of the film value chain.

4.2. Unevenness in the policy structure of Macau's film industry

There is an imbalance in the use of the three types of policy tools as well as in the frequency of the use of policy tools in different segments of the film value chain, and the skewed or even missing frequency of the use of policy tools may result in limited development and slow growth of the film industry.

4.3. Mismatch in Macau's film industry policy system.

The three levels of policy instruments usually need to complement each other in order to be effective. However, the current system of Macau's film industry policy has an inverted triangle structure with a large top and a small bottom, i.e., there are a lot of target planning and macro policies, while the basic sub-policy system is missing or insufficient, which is a mismatch that makes the policy implementation and operability weaker[6].

5. Policy recommendations

First of all, to adjust and optimise the use structure of various policy tools, and to promote the rationalisation and balancing of the policy structure. Combined with the current situation of

Macao's film industry policy, the first task is to improve the insufficient or even missing subcategories of policy tools, so as to enable the policy tools to be used in their full potential to play a more effective role in supporting the policy, and to truly provide security, impetus and pulling power for the development of the film industry.

Secondly, attention should be paid to the operability of policy tools and the matching of policy tools with the film value chain, so as to enhance the implementation of various types of policies. While pursuing large and comprehensive policy coverage in strategic objectives and planning, it is necessary to introduce implementation programmes that are easier to implement for different parts of the film value chain, further subdividing them into specific policy details that are easier to operate, and strengthening the operability of the policies through sound norms and standards and supporting programme strategies.

Once again, it is important to fully integrate the characteristics of the industry, effectively utilize policy tools, and better fulfill the role of the government. This involves managing the relationship between policy and the market to establish clear service boundaries and identify areas where the government and the market can complement each other through coordination and cooperation. By doing so, the rapid development of Macao's film industry can be promoted.

6. Conclusion

In summary, analyzing the Macau film industry from the perspectives of policy tools and the value chain provides solutions for its development. Firstly, in terms of policy tools, it is necessary to establish clear industry policies to provide sustainable development environment and policy support for the film industry. This includes establishing a sound legal and regulatory system for the film industry, providing preferential tax policies, and increasing funding support for film creation and production. Secondly, in terms of the value chain, it is essential to improve the Macau film industry's competitiveness globally by upgrading its value chain from upstream to downstream. This can be achieved by enhancing film creation, elevating film production technology, innovating film distribution and promotion models, and utilizing unique local cultural and geographic advantages to create films with local characteristics. Additionally, actively participating in international film cooperation and exchange will enhance the international reputation and influence of the Macau film industry. In conclusion, the Macau film industry can achieve sustainable development by efforts from both policy tools and value chain perspectives, and contribute positively to the prosperity of the cultural industry in Macau.

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