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RESEARCH ARTICLE

Tourism Industry of the Guangdong-Hong Kong-Macao Greater Bay Area

Dan Zhang¹ and Yuqi Wang² ⊠

¹Doctor, School of Business, Guangdong Polytechnic of Science and Technology, Zhuhai, China

²Master, School of Business, Guangdong Polytechnic of Science and Technology, Zhuhai, China

Corresponding Author: Yuqi Wang, E-mail: amkikiwong@gmail.com

ABSTRACT

In the context of global economic integration and increasingly strengthened regional cooperation, the Guangdong-Hong Kong-Macao Greater Bay Area (GBA) has emerged as one of China's most economically dynamic and open regions, with its strategic development position becoming ever more prominent. On February 18, 2019, the Outline of the Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area was issued by the Chinese central government, which is the core policy of my research. As an important bridge to promote economic and cultural exchanges and enhance mutual understanding among people, the development of tourism directly affects the overall image and international influence of the Guangdong-Hong Kong-Macao Greater Bay Area. At present, Guangdong focuses on building the GBA into a world-class tourist destination. As China's largest source of tourists and an important destination, the quality and efficiency of tourism development in the Guangdong-Hong Kong-Macao Greater Bay Area continue to improve. This paper takes the tourism industry of the Guangdong-Hong Kong-Macao Greater Bay Area as the research object and analyzes the unique advantages and challenges of its development. This analysis aims not only to facilitate the high-quality development of the tourism industry, foster regional integration, and enhance international competitiveness but also to promote cultural exchanges and mutual learning and provide a scientific basis for policy formulation.

KEYWORDS

The Guangdong-Hong Kong-Macao Greater Bay, Macau, tourism industry.

ARTICLE INFORMATION

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1. Introduction

To make full use of the advantages of Hong Kong, Macao, and Guangdong and deepen cooperation between the Mainland and Hong Kong and Macao, the Guangdong-Hong Kong-Macao Greater Bay Area¹ was first proposed in the document "Belt and Road"² in 2015. Four years later, on February 18, 2019, the Outline of the Development Plan for the GBA was issued by the Chinese central government. This article focuses on the tourism industry in the Guangdong-Hong Kong-Macao Greater Bay Area, analyzing its unique advantages and challenges in development.

Firstly, I will make a detailed and general introduction to the regional development of the GBA. Then, the GBA policy can also be interpreted. In this part, I mainly talk about the industrial structure of each city in this area. We can see that different cities have different industrial structures. For example, according to official Hong Kong data, the service industry accounts for more than 90% of Hong Kong's GDP. Among them, trade, finance, real estate, and public expenditure are the four dominating industries of Hong

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¹ Advancing the construction of GBA is a major decision made by the Party Central Committee with President Xi Jinping as the core.

² "Belt and Road" is the abbreviation of "21st Century Maritime Silk Road" and is the transnational economic belt initiated by Chinese government in 2013.

Kong's economy. As for Guangzhou, the tertiary industry has supported most of the economy, but in fact, the traditional manufacturing industry is still the key to economic development in Guangzhou. In the third part, I will analyze the achievements of tourism development in the Guangdong-Hong Kong-Macao Greater Bay Area, and I will also analyze how other cities should pursue tourism opportunities under the guidance of GBA policies. In the final section, based on my findings, I will propose strategies to promote the high-quality development of tourism in the Greater Bay Area.

First, strengthen policy coordination and regional cooperation, break administrative barriers, and promote the integrated development of regional tourism. Second, encourage tourism enterprises to strengthen product innovation, develop tourism products with local characteristics and cultural connotations, and achieve diversified market development. Third, encourage tourism enterprises to use scientific and technological means to improve service level and efficiency, such as smart tourism, big data analysis, etc., promote the deep integration of tourism with new technologies such as the Internet and the Internet of Things, and create a smart tourism ecosystem.

2. Regional Development of the Greater Bay Area

Guangdong-Hong Kong-Macao Greater Bay Area consists of 9 cities and 2 special administrative regions, which are Shenzhen, Dongguan, Huizhou, Guangzhou, Foshan, Zhaoqing, Zhuhai, Zhongshan, Jiangmen, Hong Kong and Macau. At the end of 2018, the area of GBA was 56,000 square kilometers, with more than 86 million people in 2023. This region has the highest degree of openness and the strongest economic vitality in China. In the GBA, Hong Kong, Macao, Guangzhou, and Shenzhen are central cities, serving as engines for driving the surrounding areas.

2.1 Advantages of Regional Development (RD)

After the return of Hong Kong and Macao, cooperation between them and Guangdong continues to deepen. Also, the economic strength and regional competitiveness of the GBA have been significantly enhanced. This area has many advantages, which provide reasons for regional development in this area.

Location advantage. The first advantage is location advantage. As we know, the Greater Bay Area is located at the front of China's opening coast, with a very convenient transportation system and the Hong Kong International Shipping Center. In addition, there are the world's foremost important ports, such as Guangzhou and Shenzhen, as well as internationally aviation hubs, like Hong Kong and Guangzhou.

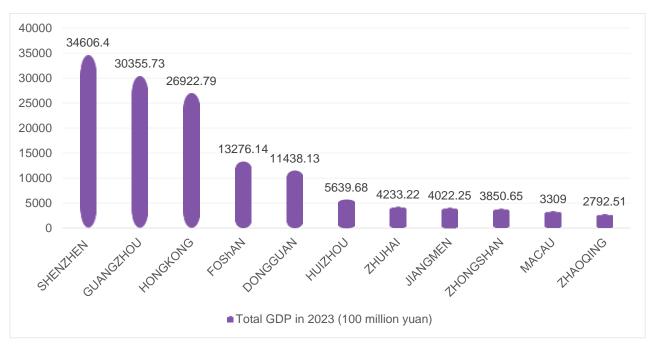
Strong economic strength. The Greater Bay Area has strong economic strength, which has a leading economic development level, a complete industrial system, obvious cluster advantages and strong economic complementarity. The service industries in Hong Kong and Macao are highly developed. And other nine cities of the GBA have initially formed an industrial structure led by emerging industries and dominated by advanced manufacturing and modern service industries. The total economic volume of the GBA was about 14 trillion yuan in 2023.

Collective innovative elements. Innovation-driven development strategy was implemented deeply in Guangdong, and the construction of an independent innovation demonstration area was accelerated. Hong Kong, Macau, and Guangdong have superb scientific research capabilities. Compared with many other areas in China, the GBA has many outstanding universities, research institutes and high-tech enterprises with important influences inland and abroad. All of these conditions laid a good foundation for the construction of an international science and technology innovation center.

Leading international level. Hong Kong, as an international financial, shipping, and trading center, has one of the world's freest economies and a global business network. Macao, as a world tourism center, provides a platform for business cooperation and service between China and Portuguese-speaking countries and has continued to strengthen its role in multicultural exchanges. Additionally, the nine cities of Guangdong play important roles in accelerating the construction of a new open economic system in the mainland.

2.2 Issues of Regional Development (RD)

Unbalanced development of regions. Although Guangdong Province is the fastest growing economy in China, there are still many development gaps between the nine cities in the GBA and, Hong Kong and Macao. In terms of GDP, which can be seen in Table 1, Guangzhou Shenzhen have similar GDP levels, with a total GDP exceeding 3 trillion yuan (1 yuan is about 0.14 US dollars), belonging to the "first group."; The total GDP of Hong Kong is nearly 2.7 trillion yuan, belonging to the "second group"; Foshan and Dongguan both have a total GDP of more than 1 trillion yuan, belonging to the "third group"; The total GDP of the remaining six cities, including Macao, is about 2.3 trillion yuan.



Total GDP of cities in the GBA in 2023

Talent shortage in the mainland. On the one hand, from the perspective of educational background, the high concentration of highly educated talents is a common feature of first-class bay areas. The proportion of talents with bachelor's degrees or above in the San Francisco Bay Area and the New York Bay Area is 46% and 42%, respectively, among which the population with bachelor's degrees, graduate degrees, and professional graduate degrees in Silicon Valley exceeds 50%. However, there is still a large gap in highly educated talents in the nine cities in the nine mainland cities of the GBA. Among the talent needs, the demand for postdoctoral and above and master's degrees accounts for 2.1% and 22.2%, respectively. On the other hand, from the perspective of industry job structure, the "Catalogue of Urgently Needed Talents in the Guangdong-Hong Kong-Macao Greater Bay Area (Mainland) (2022)" shows that the most urgently needed talents in the nine mainland cities are engineering and technical personnel, accounting for about 26.31%. From the perspective of positions, the demand for automatic control engineers and R&D positions is the largest, accounting for 33.75% and 25.97%, respectively.

Institutional barriers. If the shortage of high-end talents causes imbalances in regional development, then institutional barriers are an important factor hindering the flow of talent. The idea behind the GBA is to make full use of the region's strengths in manufacturing, finance, technology, and other industries to create a highly active market and a stronger international competitiveness. But the current reality is how to reduce trade and tax barriers and even deeper cultural barriers between Hong Kong, Macao and the mainland. For example, in terms of taxation, compared with Hong Kong and Macau, the mainland is still a high-tax area. For individuals, Hong Kong currently implements a standard rate of 15%, and Macau's occupational tax is up to 12%. Taking into account the tax refund, the actual tax rate may be lower. Hong Kong and Macau residents who stay on the mainland for more than 6 months are subject to personal income tax in accordance with the mainland's tax types. Similar regulations also hinder Hong Kong and Macau talents from entering the mainland to work.

2.3 Needs of Regional Development (RD) for China

As for the interior of the GBA, both Guangdong itself and Hong Kong and Macau are facing the challenge of sustainable development. Although Guangdong has made some achievements, it lacks the stamina for future development. Quantitative economic growth has encountered a bottleneck, and its qualitative economic growth model needs to be developed. The same is true for Hong Kong and Macao. Since the return, most of the industries have been transferred to the Pearl River Delta. The local industrial structure is single, and technological innovation is weak and lacks space. In terms of the external environment, China is currently facing an increasingly severe international economic situation. The United States is comprehensively promoting trade protectionism and economic nationalism and launching a trade war against China. Although the trade war was not initiated by China, it is also largely inevitable. Since there are many problems that need to be solved in regional development, it is necessary to develop this region.

3. Strategic Positioning of the Greater Bay Area

The Outline of the Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area was issued on February 18, 2019. This policy aims to fully implement the "one country, two systems" principle, deepen cooperation between the mainland and the two special administrative regions, and further enhance Guangdong's leading role. The GBA has a total of 9 cities and 2 special administrative regions, playing different roles in regional development. The GBA is based on the four central cities of Guangzhou, Shenzhen, Hong Kong and Macao as the core of research and development.

3.1 Hong Kong

According to the Hong Kong Statistical Yearbook, the population of Hong Kong in 2022 is 734.61 million. As we have discussed before, Hong Kong's GDP in 2022 will reach 2.82 trillion Hong Kong dollars (about 3.62 trillion yuan). According to official data from Hong Kong, the service industry occupies an absolute proportion of Hong Kong's economic structure, accounting for more than 90% of Hong Kong's GDP. Among them, trade, finance, real estate, and public spending are the four major leading industries of Hong Kong's economy. In addition, there are many well-known industry giants in Hong Kong. According to the Forbes Hong Kong Rich List, the top three Hong Kong rich list are Li Ka-shing's Cheung Kong Group, Lee Shau-kee's Henderson Group, and Lee Man-tat's Lee Kum Kee Group, with a total asset of US\$78.8 billion (about 532.3 billion yuan).

Based on the above facts, Hong Kong's role in the Greater Bay Area has become very clear, namely, to enhance Hong Kong's status as an international financial, shipping, trade center, and international aviation hub, to strengthen Hong Kong's status as a global offshore RMB business hub, an international asset management center, and a risk management center, and to develop innovative technologies, cultivate emerging industries, build an international legal and dispute resolution service center, and create a more competitive international metropolis.

3.2 Macau

The administrative area of Macao is 32.8 square kilometers. According to the Statistics and Census Bureau of Macao, the population of Macao in the third quarter of 2023 was 683,700, and the GDP in 2023 was 378.48 billion patacas (about 335.22 billion yuan). Macao's economy is mainly supported by the gaming industry. Unlike Hong Kong, Macao's economic pillar is relatively single, and due to the particularity of the gaming industry itself, whether Macao's economy can remain stable depends on whether there is enough floating population to support its gaming industry. The gaming industry has a certain correlation with the tourism industry, and the gaming industry is a supporting industry for the tourism industry. A basic common sense is that if the leisure and entertainment industry in a certain area is not well developed, the tourism industry will definitely not develop. The gaming industry can serve as a pillar of the leisure and entertainment industry, and the development of tourism has become a regional feature.

Therefore, Macao's strategic positioning in the Greater Bay Area is to build a world tourism center, a trade and economic cooperation platform between China and Portuguese-speaking countries, and a base for exchanges and cooperation between China and foreign countries.

3.3 Guangzhou

The resident population of Guangzhou at the end of 2022 was 10.349 million. Calculated at comparable prices, Guangzhou achieved a regional GDP of 2,883.90 billion yuan in 2022.³ Among them, the tertiary industry accounts for more than 70% of the total GDP. From the data, we can see that Guangzhou's tertiary industry has supported most of the economy, but in fact, Guangzhou is still in the process of switching between old and new kinetic energy. The traditional manufacturing industry is still the key to economic development in Guangzhou, and the industrial chain relying on automobiles and electronic products is still one of the important pillars of Guangzhou's economy.

According to the outline of GBA, Guangzhou, as a national central city, should strengthen the functions of international business centers and transportation hubs, cultivate the functions of science and technology education and cultural centers, and strive to build an international metropolis.

3.4 Shenzhen

Shenzhen's economy mainly relies on industry, finance, wholesale and retail. According to preliminary calculations by the Guangdong Provincial Bureau of Statistics, Shenzhen's GDP in 2022 was 32,387.68 billion yuan. According to the unified accounting results of Guangdong Province's GDP, Shenzhen's GDP in 2022 was 3238.768 billion yuan, a year-on-year increase of 3.3%. Among them, the added value of the primary industry was 2.564 billion yuan, a year-on-year increase of 0.8%; the added value of the secondary industry was 1240.588 billion yuan, a year-on-year increase of 4.8%; the added value of the tertiary industry was

³ Brief Introduction of Guangzhou's Economic Operation in 2022. Guangdong Provincial People's Government Portal. (2023, January 28). Retrieved from http://www.gd.gov.cn/zwgk/sjfb/dssj/content/post_4085877.html

1995.616 billion yuan, a year-on-year increase of 2.4%.⁴ Shenzhen is an ideal place for ambitious young Chinese to realize the Chinese dream. Shenzhen is a young city with a large number of young entrepreneurs. These young people work very hard, and they are Shenzhen's greatest wealth.

In view of these characteristics, Shenzhen should play a leading role as a special economic zone, a national economic center city, and a national innovative city.

3.5 Other seven cities in the GBA

Compared with these four central regions, the other seven node cities are the supporting roles in the "Planning." The role of these cities is to fill the gaps in the industrial structure of the four central cities, engage in staggered competition, and thus improve the industrial chain of the entire GBA.

The economic pillar of the seven node cities is still traditional manufacturing. The division of labor model left over from the old era has led to the economic development of the seven node cities being heavily dependent on the external environment.

Hengqin (mentioned many times in the "Plan"), Gaolan Port, High-tech Zone, and other places are the key industrial sites of Zhuhai, gathering a large number of precision machinery manufacturing, petrochemical, home appliance electrical, electronic information, biopharmaceutical, and other enterprises, forming the economic pillar of Zhuhai. The most famous enterprise is Gree Electric Appliances.

Foshan is rich in ceramics and building materials, and there are many well-known local enterprises, such as Midea Group and Country Garden. In addition, a number of ceramic companies, such as Foshan Diamond Ceramics and Xinzhongyuan Ceramics, are quite famous.

Huizhou's economic pillar is mainly related to electronic-related industries. There are also some famous companies, like TCL Group and Desay Battery.

Dongguan was once a famous erotic town in China. After the anti-corruption storm in 2014, Dongguan's economy showed a significant decline. Now, Dongguan has returned to manufacturing. Since 2018, Shenzhen manufacturing companies have begun to move to Dongguan, and the most famous move is Huawei's relocation of its mobile phone manufacturing base from Shenzhen to Dongguan.

Zhongshan's economic development mainly relies on the home appliance industry. It is worth mentioning that the most famous home appliance giant, Vatti, has settled in Zhongshan.

The industrial distribution of Jiangmen is quite mixed. Unlike other cities, Jiangmen does not have any outstanding industrial representatives. Traditional manufacturing industries such as machinery and equipment, clothing, food, and papermaking are all evenly distributed. A slightly more famous enterprise is Vinda Paper.

Zhaoqing's economic pillars are automobiles and machinery equipment. The well-known new energy vehicle industry Xinrui Xiaopeng Motors sets its production base in Zhaoqing High-tech Zone.

In addition, the GBA outline proposes that the cooperation between Hong Kong and Shenzhen, and Macau and Zhuhai should be deepened, and build a Guangzhou-Foshan metropolitan area. Zhuhai and Foshan may stand out from the seven node cities and become the first to benefit from first-tier cities.

4. Achievements in Tourism Development in the Greater Bay Area

4.1 Infrastructure Construction and Transportation Network

At present, the Greater Bay Area is vigorously increasing investment in infrastructure construction. The interconnection of the high-speed rail network has made remarkable achievements. The layout of the world-class airport cluster has been continuously improved, effectively shortening the spatial and temporal distances between cities in the region and promoting the interconnection of people, logistics, capital, and information. The improvement of the transportation network has also promoted the cross-border integration and innovative development of the tourism industry. For example, the opening of the Shenzhen-Zhongshan Channel has given rise to new forms and patterns of cultural tourism consumption in Shenzhen and Zhongshan and stimulated the vitality

⁴ Brief Introduction of Shenzhen's Economic Operation in 2022. Guangdong Provincial People's Government Portal. (2023, January 30). Retrieved from http://www.gd.gov.cn/zwgk/sjfb/dssj/content/post_4087151.html

of industrial innovation. It not only enhanced the attractiveness and competitiveness of tourism but also promoted the balanced allocation and utilization of tourism resources, providing new impetus for the high-quality development of tourism in the GBA.

4.2 Tourism Brand and Marketing

The Greater Bay Area should enhance the development of tourism brands by leveraging government policy support, enriching top-level design, and establishing a strong foundation in the Bay Area while collaborating with Hong Kong and Macao to create iconic cultural landmarks. This approach will enhance the recognition and appeal of tourism brands, integrate regional characteristics into brand development in the Greater Bay Area, and improve both the cultural quality and international influence of the tourism industry. For example, Macau's convention and exhibition industry has made full use of its unique advantages and resources, has successfully cultivated a number of influential brand exhibitions in recent years, and has made great progress in brand building, exhibition hosting, and international marketing. This not only enhances Macau's international reputation but also boosts the growth of related industries. Adopting a multi-channel promotional strategy to build a strong brand image can increase tourists' interest and engagement, improve market competitiveness, achieve sustainable development, and tourist destinations can increase their visibility and attractiveness.

4.3 Cultural and Tourism Integration and Industrial Innovation

China's tourism industry is improving and upgrading, and a number of new formats have emerged, such as the e-sports industry, IP tourism, intangible cultural heritage tourism, performance tourism, etc., as well as new experiences and new plays in the form of camping, surfing, diving, etc. These new formats have brought new growth points to the tourism industry, and "new" has become the most distinctive label of China's tourism industry. In the future, the Greater Bay Area should also focus on the development of new tourism formats, rely on resource endowment and cultural characteristics, introduce scientific and technological elements and creativity, create a series of new modern cultural and tourism industry systems, and foster new quality productivity and promote high-quality development of tourism in the GBA.

5. Tourism Industry in Other 10 Regions in the Greater Bay Area

The tourism industry has always been regarded as a sustainable development industry that is beneficial to the city's economic development and environmental protection. There is no doubt that Macau's pillar industry in the next few years will be tourism. However, the situation in other regions is not the same. In spite of the development of other industries, in this part, I will mainly focus on the development of the tourism industry in various regions.

5.1 Zhuhai-Zhongshan-Jiangmen City Group

The first place I want to talk about is Zhuhai. As we know, Zhuhai's tourism industry has developed rapidly in recent years, and many tourist attractions are well built, such as Chimelong Ocean Kingdom, Zhuhai Royal Hot Spring Resort, Zhuhai Grand Theater, etc. Zhuhai's coastline is about 604 kilometers long, with about 150 islands of various sizes, and is known as the "City of Hundred Islands". The total tourism economy of Zhongshan and Jiangmen is not high, but they are rich in potential tourism resources. Zhongshan is the hometown of Sun Yat-sen and has the potential to develop historical and cultural tourism. Shenwan Town in Zhongshan has created a yacht tourism brand and has great potential for transformation into characteristic tourism and high-end tourism. Jiangmen has high-quality tourism resources such as "Bird Paradise," Kaiping Diaolou, hot springs, and islands.

5.2 Guangzhou-Foshan-Zhaoqing City Group

Guangzhou is the political, cultural, economic center, and transportation hub of South China. Its tourism industry is multifunctional, multi-level, and all-round, integrating tourism, food, shopping, entertainment, urban culture, transportation, etc. It drives the development of the tourism economy through different tourism industry layouts. As the hometown of Bruce Lee and Huang Feihong, Foshan's urbanization process is in-depth with Guangzhou. However, unlike Guangzhou's tourism modernization, Foshan's martial arts culture and folk art attract tourists from all over the world. Zhaoqing, the birthplace of Lingnan aboriginal culture, is positioned as the southwest gateway city of the Pearl River Delta, with a long history and beautiful scenery. Because the urbanization speed is not as fast as in Guangzhou and Foshan, the development of tourism resources is weak and the attraction is relatively small. However, driven by Guangzhou's tourism economy, Zhaoqing has gradually become a choice for tourists to travel short distances.

5.3 Hong Kong-Shenzhen-Dongguan-Huizhou City Group

Hong Kong is an international city with a fusion of diverse cultures, rich tourism resources, and a combination of tradition and modernity, which attracts a large number of tourists. Shenzhen is a major tourist destination in China and a gateway between Hong Kong and the mainland. It has unique urban landscapes, numerous theme parks, and beautiful coastal resources. Huizhou has natural landscapes such as mountains, forests, seas, islands, lakes, hot springs, waterfalls, and many ancient villages, bays, and islands. As the belly of Shenzhen's economic, strategic radiation range, the development and construction of Daya Bay tourist destinations have driven Huizhou's tourism economy. Dongguan has natural scenery such as coastal beauty, rice fields and banana

forests, blush lotus, and Qifeng scenic spots and historical sites, as well as historical sites such as Yinping Mountain, Opium War Museum, and the world's largest golf club, but its tourism popularity is not as good as other cities in the Greater Bay Area.

6. Conclusion

For most cities in the Greater Bay Area, tourism is not a core industry, and they do not pay much attention to the development of tourism. However, most cities in the Greater Bay Area have the potential to develop tourism, and they are rich in tourism resources, which is conducive to the sustainable development and environmental protection of cities. Sustainable development has always been an important concept in the development of modern cities. Cities such as Hong Kong, Macao, Guangzhou, and Shenzhen can attract more talent by developing into tourist cities while developing core industries, and traditional manufacturing cities such as Dongguan, Foshan, and Zhongshan can also improve the environment by developing tourism.

First, in order to strengthen policy coordination and regional collaboration, break down administrative barriers, and promote regional tourism integration and development, regional governments should jointly formulate unified tourism policies, establish effective coordination mechanisms, promote policy innovation, and strengthen cooperation in tourism infrastructure construction, brand promotion, resource sharing, etc. In addition, establishing an efficient communication and coordination mechanism to ensure seamless interaction and close collaboration among regions is also an important way to promote regional tourism integration and development.

Secondly, tourism enterprises should be encouraged to strengthen product innovation and develop tourism products with local characteristics and cultural connotations. Tourism enterprises should deeply explore local culture, extract representative elements from rich cultural resources, integrate them into tourism product design, cultivate symbols to achieve emotional connection, strengthen emotional ties with tourists, and enhance the cultural and emotional value of products. In addition, according to market feedback and changes in tourist demand, tourism products should be continuously optimized and innovated to maintain product competitiveness and attractiveness.

Last but not least, tourism enterprises are encouraged to adopt technological innovation to improve service quality and operational efficiency. At present, emerging technologies are constantly changing the tourism industry, including big data analysis, artificial intelligence, service robots, self-driving cars, etc., which have a significant impact on the tourism industry. For example, artificial intelligence has significantly improved the tourist experience and improved the operational efficiency of tourism companies through personalized information delivery, excellent data quality and service standards, and market analysis and forecasting capabilities. Tourists can benefit from tailored travel recommendations, while companies can understand market demand more accurately.

Although tourism may not be the main development focus of cities in the Guangdong-Hong Kong-Macao Greater Bay Area, its rich resources and development potential contribute greatly to urban sustainable development and environmental protection. While continuing to develop core industries, cities in the Greater Bay Area should actively explore and utilize tourism resources. Promoting the healthy development of the tourism industry through policy coordination, product innovation, and technological progress can make positive contributions to urban sustainable development and environmental management while attracting talent and promoting economic diversification in the region.

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