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未来城市可持续发展论坛  
暨第十届中国地产经济主流高峰论坛 **特辑**

2012 FORUM ON THE FUTURE OF SUSTAINABLE URBAN DEVELOPMENT SPECIAL ISSUE



未来城市可持续发展论坛  
SUSTAINABLE URBAN DEVELOPMENT



第十届中国地产经济主流企业年会  
REAL ESTATE ENTERPRISES  
ANNUAL MEETING, CHINA  
2012

## 打造 21 世纪 世界榜样的中国城市 21st Century China, an Example to the World

全国人大环资委主任、建设部原部长汪光焘，住房和城乡建设部房地产市场  
监管司司长沈建忠在论坛上的讲话（全文）



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**Andrew Ness 聂安达**

城市土地学会独立顾问，2012年  
中国城市调查项目总顾问

Independent Consultant Urban Land  
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2012 ULI China Cities Survey

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Andrew Ness is currently an independent consultant working with the Urban

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# 经济发展对房地产发展的启示

## Mainland China Real Estate Markets

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Shenyang is the economic center of NE China, enjoys substantial support from the Central Government's "Revitalize the NE" policy, and has furthermore made sizeable advances in sustainable development and is benefiting from connectivity to the national high-speed train network. Tianjin is also benefiting from similar advantages and anchors one end of the very promising BJ-TJ development corridor. Despite these strong features, some respondents felt that the property market in both cities would come under some supply pressure from the large number of commercial and mixed use developments that are just now beginning to come onstream.

在2012年1月到3月的时候,我们完成了的关于经济发展对房地产发展的调研报告。这个调研非常全面,超过50个海内外开发商、以及第三方独立机构参与其中。参与调研的对象,有40%为本地开发商、以及房地产相关企业,而剩余的60%都是海外第三方的独立机构。因此可以说,这是个非常公正的调研。

以下就让我来为大家讲讲,这个调研报告带给我们什么样的信息?今天的经济发展对房地产发展有何影响呢?

### 城市竞争力决定城市未来

我们的第一个问题:在未来的几年当中,你到底能在哪一个城市赚到钱?这取决于城市的竞争力。

首先,我想讲一下沈阳地区。沈阳在整个中国地区的地位是比较重要的,它是一个大型的工业化城市。沈阳有很大的竞争优势——不只是经济上面的强势,沈阳也有独特的提升点:它既适合居住、工作,又适合投资。同时,沈阳也都欢迎高智商以及高学历人士来这里工作。正因为如此,沈阳会在短时间内得到很快的提升。我们知道,引领高端劳动力,是维持城市

发展的重点。而城市的潜在投资者,就会产生在这一类人群中。如果说毕业生都愿意来这个城市发展,那为什么我们不投资这个城市呢?如果年轻的大学毕业生不到这个城市生活的话,为什么我要来这个城市投资呢?

当然,城市发展除了广纳人才,也要懂得学习借鉴,这也是一个城市的潜力的体现。在这方面,成都和上海是好榜样。我见过相关的市长,他们告诉我,在过去的这些年间,他们得到了很多中央政府的支持和辅助,这些都是很吸引人的。这些城市都抓住机遇,吸引很多外资进驻。很多大的国际性公司,他们都在成都和上海建立了总部。举个成都的例子。成都的商业中心区是一个新的开发区,这个商业中心区给成都带来了很好的发展。为了做好这个商业区,他们会专程到香港以及其它发达城市去学习、借鉴,同时,他们也会把这种良好的经验带到我们的开发区来进行发展,我认为这是成都地区非常好的经验。因为成都在城市内建立很多的工作机会,让这些大学毕业生可以建立起好的工作和生活,年轻人就愿意来这里发展,城市就有了新的生机。

位处上海周边的杭州,这个区域也有很多的非自然的投资



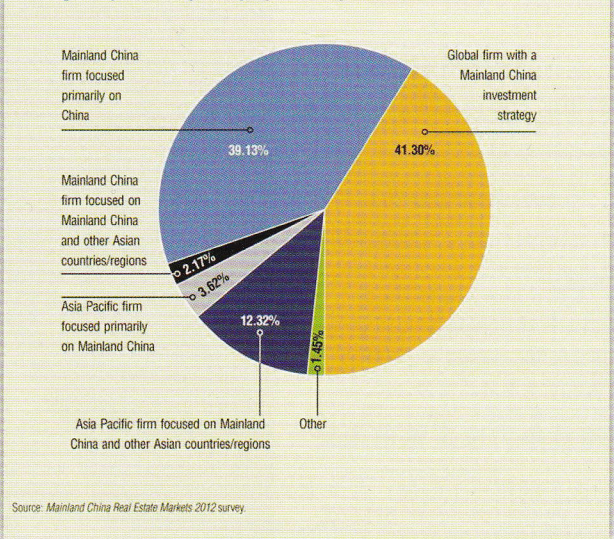


因素。我们发现杭州是一个因为可持续发展而带来震撼力的城市。杭州地区是一个以美丽风景而著名的城市。杭州不仅名胜古迹非常多，还有不少的原始生态公园，整个城市非常有魅力。除了生态上的发展优势，杭州的总部经济也非常火热。阿里巴巴、淘宝这一类大公司总部都是在杭州。总部经济+生态、观光经济的复合发展模式，是值得其他城市借鉴的。很多大学毕业生愿意把自己的第一份工作安排在杭州，因为这个城市让人们过的非常舒适，很多人愿意到杭州发展他们的未来。

### 沈阳发展潜力无限

说到我们现在身处的沈阳。我们根据数据做了一个分析，觉得在中国北部的城市中，沈阳有它的独特优势，但他们需要做的事情也是非常多。比如说，尽快采取措施净化城市空气，更积极地推进高技术产业的发展。在二十世纪九十年代初期，沈阳的发展模式还没有定义出来，而经过20年之后，现在沈阳已经开始反思，正在重新建构整个城市。另外，我们看到沈阳企业的成长是非常快速的。西安是西部城市中发展商业比较成功的例子，西安也是复制成都的商业模式，走的是吸引投资的路子。沈阳也可以参考西安的经验，考虑怎么样去吸引投资。

Survey Responses by Geographic Scope of Firm







- Few developers not impacted by the new round of market tightening measures, and majority are re-positioning development activity to deal with the new, tougher operating environment
- Difficulty in raising external financing is negatively impacting financially overstretched developers but represents a window of opportunity to private equity funds
- Diminishing competition levels, lower land auction prices and weaker residential buyer sentiment represent an opportunity now to firms with strong balance sheets
- Outlook for China's domestic economy not a major issue for most respondents, except those with sales properties in areas exposed to downturn in China's external economy
- Central government move to push for development of more affordable housing and to broaden the base of collection of property holding tax were not seriously threatening, but move to implement previously laxly enforced L.A.T. regulations is a concern

Survey of the investment prospects of the 28 cities showed following results:

Cities which retained their previous high ranking

Chengdu, Shanghai

Cities which rose dramatically, as compared with their 2011 ranking

Hangzhou, Shenzhen, Wuhan, Changsha

Cities which displayed stability in their ranking

Qingdao, Suzhou, Wuxi, Guangzhou, Tianjin, Shenyang

Cities which declined in their 2012 ranking

Chongqing, Beijing, Nanjing and Dalian

Cities providing interesting prospects over short-term

Xi'an, Sanya, Ningbo, Xiamen

Cities to watch over the mid-term

Wenzhou, Haikou, Fuzhou

Cities which are longer term investment plays

Nanning, Lanzhou, Urumqi, Shijiazhuang, Harbin

• Interest strong with respect to inland areas which are presently favored by central government policy as well, in SW, NW and Central China, and especially Chengdu, Wuhan, Xi'an and Changsha

• Respondents were more cautious about the short-term prospects of already mature cities on the eastern and southern coast, and especially Guangzhou, Suzhou, Nanjing

• Respondents also expressed hesitation about some leading cities, such as Tianjin and Shenyang, which are poised to experience problems from excess supply of new stock, across a number of sectors

• Only exception to this rule were cities such as Shanghai, Hangzhou and Shenzhen, which have succeeded in positioning themselves as attractive places to live and work and become a magnet for qualified people

• Ranking of many cities benefited from growing connectedness to neighboring larger cities via high speed train system, including some cities which otherwise showed declining trend, Shenyang, Shijiazhuang, Nanjing, Wuhan, Suzhou, Hangzhou, Guangzhou, Shenzhen, Changsha

• Respondents were aware of the power of politics to move real estate markets in China, and while few were rushing into Xiamen, Fuzhou, Nanning, Urumqi, Lanzhou or Harbin right now, there was an awareness that these cities could suddenly become more attractive