

# 中国海外产业园

## 产业集群走出去的经验与反思

### CHINA'S OVERSEAS INDUSTRIAL PARKS

### REFLECTIONS ON THE GOING OUT OF INDUSTRIAL CLUSTERS

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## 2020选题邀你加入



# 大城市年轻人居住

商品房社会20余年来，  
空间从单位宿舍式转向大客厅大卧室，  
转向大客厅小卧室，  
再转向小客厅或者复合空间+卧室，  
再到宿舍+超大集合公共空间和邻里属性，  
关于住宅形态或者长租公寓形态的研究多落入消费口径。  
关于住宅问题很常见的探讨均基于分配公平、减轻区隔、增加公共空间等内容。  
集体想象的变迁对住宅形态的影响是怎样的？  
后金融危机时代大型居住空间怎样释放公共性？  
虚拟社交网络的组织如何投射在实体空间上，增加更多交流和共同生活的机会？



《城市中国》编辑赵恣：  
城市规划专业，偏好经济地理、城市研究和历史演化方向，强烈期待有经济学、人类学、社会学、比较文学等人文学科背景和本地化研究经验的作者参与到UC的城市话题。  
228339704@qq.com

读编往来  
*Reader's  
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ISSUE  
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### 成都览胜

人、城、境、业 成都公园城市范式

如果说过去的20年是中国以最大规模、最快速度建设新城的时代，那我们在提倡集约利用土地、激烈讨论城市更新的今天，如何构建新的城市轮廓？如何看待新城建设以及如何重新构建其与老城之间的新关系？如今的新城应以怎样的方式建设以适应新的经济发展状况和国土规划要求？或许在成都这个仅次于北上广深几个城市的“新一线城市”，能更明显看出这种更新与新建并行的状态。自2003年的城乡统筹开始，成都多次做出经济、规划层面的创新，来应对城市规模和体量的增长。“公园城市”这一城市理念在2018年的成都被提出，并出现在公众视野。通过实地采访和规划、政策分析，上期课题读解了成都的转型之路。

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声明 2019年10月24-29日，我刊受邀参加了2019年苏州国际设计周(SDW)，以“超·中国——河道轨道映射的中国加速与压缩镜像”为题策划了以京杭大运河及高铁发展为主要内容的城市主题展，现场反响颇著。其中，核心图解中用到了数张钱海峰老师曾发表于我刊的个人摄影作品，因编辑部工作的疏漏，未能在展出中注明钱海峰老师著作权并提前联络，特此声明并郑重致歉。我刊将会继续秉承尊重一切著作权的理念，在今后的出版、展览中为读者呈现更加优质、创造性的内容。

—《城市中国》编辑部

读者评刊



在我眼中成都是城市化和本土平衡保持得最好的城市之一，广州也算一个吧，要现代的生活方式它有，要传统文化习俗的部分它也有。

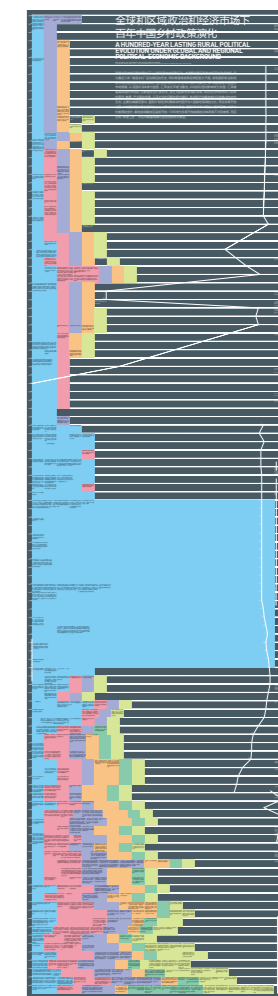
—新浪微博@无敌小神灯

感谢《社区规划师》这期杂志，为了写文章，这本杂志我都看破了边。就是太重了，背着比电脑还沉，每次出去都想放弃背它。

—汪小叨 上海

如今中国很多城市都是千城一面。很多城市因为市容等原因拆除了沿街商铺，先不论这些原因是否得当，就城市的氛围、文化、丰富性来说，是不利的。

—丹圆欲润 豆瓣



小张问我为什么趴在地板上学习，我在看《百年中国乡村政策演化图》

—周么么 杭州&云南景迈山

纠错

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1. 第111页第1段第四行，发稿时成都地铁运营线路应为1、2、3、4、7、10号线，共六条线路。感谢读者 benoitup 纠错。

# “走出去”时代中国规划的转型和经验分享

## THE TRANSFORMATION AND EXPERIENCES OF CHINESE URBAN PLANNING IN 'GOING GLOBAL'

文 / 匡晓明[城市中国总编]  
Text / KUANG Xiaoming[Chief Editor of Urban China]



全球时代的特别之处在于，或许，人类的生存世界第一次凝练为一个整体问题。从哲学的视角来看，社会的永续发展首先是作为历史性的、整体的世界的存续问题。这要求规划师要联动并整合金融、法律、政策等各专业人员进行顶层规划，然后再落实到空间规划。人人互联、高度扁平的社会，必将需要构建一种更为科学的社会治理体制。因此无论对内还是对外，规划师肩负的责任，远比想象得更为沉重。

### 两个不同

#### TWO FUNDAMENTAL DIFFERENCES BETWEEN CHINA AND THE UNITED STATES

在市场经济下，资本是自由流动的，哪里有需求，产业和贸易就会流向哪里。20世纪80~90年代因为美英等发达国家自身采用新自由主义理论，于是世界银行和国际货币基金组织也对不发达国家和地区给出了英美式的解药，从直接援助变成了美国从大萧条时期即采用的面向自己本国农民“消费不够贷款来凑”的策略，而不顾当地的社会生产关系基础，强迫对方国家在接受援助之前答应一系列苛刻的国家级“转型”要求。这即是后来备受争议的“美国式文化/经济输出”和“经济操纵”的症结所在。

而中国与美国“走出去”的不同主要集中在两点。首先是立场的不同，中国追求的是全球一体化的过程中的公平性，“人类命运共同体”即是出于被新自由主义剥削的不发达国家和地区的立场，质疑之前一度统治全球的，由发达国家自说自话引领的新自由主义发展理念。中国尊重其他国家的主体性，并且认为落后国家和地区的存在对于发达国家和地区而言也是一种讽刺，一种潜在的伤害。其次，中国在“走出去”的过程中，政府与以跨国公司为代表的一般资本作用相当，肩负着相当于主权国家内部“规范市场”的责任。上一

个阶段的“全球一体化”主要指资本的自由流动，国家的意义在于保护资本流动的自由和便利。但中国政府的作用是让资本有组织地流到有需求的地区，不是放任型的“自由”，而是有计划地引导和组织，帮扶不发达国家和地区，带有更高尚的目的和更集中的效能。

中国的模式带有市场经济和计划经济双重性，在“走出去”的过程中也是如此。谁说美国是“完全放任”式的市场经济？他们的计划部分也占了很大的比重，只不过因为金融流动性较高的传统，采用的主要是控制信贷等手段，隐蔽性更强而已。

### 五个方面

#### FIVE SECTORS RELATED TO NATIONAL STRATEGY

基于上述两个根本的差别，建筑和城市规划学界与“一带一路”倡议、“走出去”等政策相关和交叉的部分主要有五个方面。第一是发展诉求。全球经济发展的结果导致弱势国家需要在市场经济的背景下受到更大尺度政策的倾斜，以避免被资本吞噬，难以迈出资困陷阱。不发达和欠发达地区有强大的发展需求，需要找到合适的内在动力以激发发展的主体性。中国的策略是相对被动的“你提出，我再去”，对方可以自由选择任何国家的发展路径进行效仿和学习，我们并非强加于人。确实很多经历了20世纪80~90年代由

经济危机引起的暴力和混乱，现在百废待兴的非洲国家将中国视为第一学习目标，中国改革开放的成功相当于为他们树立了一个“短平快”的标准。而我们能够为他们提供的服务，首要是在政策制定和法律建设方面，因为我们的强项和特色在于市场经济的背后有着强大和稳定的政府引导。现在国家和省级的海外自贸区建设即利用了自身的特点，首先是要帮对方国家立法，保证选举导致的政策不稳定性对园区的发展不会起到干扰。这属于战略规划层面，要求规划从业者站在更高的角度，具有全局观，并非仅仅提供一套可以操作的规划指标。

第二是市场动力。无论有没有中国政府的参与，非洲的市场都在这里。中国在40年的时间里变成了世界级的工业制造业大国，本来就是全球工业产品的供货商，占据着生产的高地。中国产业“走出去”与美国最大的不同点在于，并非像美式跨国公司那样将利润最高的部分攥在自己手里，而大型成熟企业大量的半熟练工作通过产业外包降低生产成本，而后返回本国和或相近文化圈的市场。中国，更大范围来说亚洲“雁阵模式”的特殊点在于除了政府基建项目之外，很多企业都是小规模，并不“成熟”、“尖端”，是产业链中游的部分，或扮演着物流园区的角色。他们采用的做法是：从上游原材料从中国、本地或邻近国家进口，中游部分国内熟练技师出国与所在国半熟练工种配合的方式，降低下游的销售风险。消费渠道也往往并不是中国自己，只是仰赖本地消费群体比例较大，甚至以本地市场为主。中国很多企业目前所做的恰恰不是“落后产能输出”，而是研究所在国（主要是非洲国家）市场的特殊需求并且量身打造适合他们需求的产品，比如适应非洲人肤色的定制手机，比如应对电力供应不足国家和农村的，超强耐耗的电池。这些小型创新式研发都是市场行为，企业自身如果有需求就会投入，并且不分国家。如果用中国自己的经验来谈，我们确实用部分市场换取了发展、就业、行业标准升级，但我们的自主性表现在以让渡一部分市场为前提下的主动学习，而产业园相当于国外投资和企业对华展示的窗口，例如昆山直接针对韩国投资的产业区，苏州直接对接新加坡的工业园等，甚至东莞本身就是个超大型规模的“香港产业园”。并且这些产业园有很多有本地政府背书，园区中也不只有对方国的企业，我们自己的优秀企业也入驻其中。关于市场动力方面，规划师可以参与的方向主要是在经济地理方面，研究本地产业集群的内在逻辑和特色，帮助所在国制定合理的产业空间配置方案，而非直接参与到市场行为本身中去。

第三是文化认同。之前一直在强调“我们不想把自己的文化强加于其他民族”，但如果对方感兴趣，我们欢迎学习交流，并且我们也自信于自己文化的中庸、和谐和包容性。不可否认的是文化认同与市场有某些内在的联系，人类社会也普遍具有“见贤思齐”和向上模仿的心理。有个很有趣的点是日本的轻工业产品与电视剧对中国的输出是同一个时间段，当我们在看连续剧的时候，就能够理解他们的产品为何设计成现有模式，使用起来怎样符合他们的作息习惯。以宜家为代表的北欧家具采用的是设立实体店的方式，让人近距离感受到某些普适性的生活问题和解决方式（比如住房面积小和经费有限的时候怎样安排空间），文化交流也是较为被动性的简

餐厅体验瑞典料理，或者家具装饰品上放两个“瑞典小木马”，点到为止，而不是堆砌华而不实的符号。

第四是城市管理经验的分享。虽然我们的治理水平亟待提高，但并非只有最先进的成熟经验才值得被探讨。我们有一些经验，例如快速建设，农村人口城市化和城市化初期“从零到一”的治理经验是值得分享的。例如本地化的“控制性详细规划”的源头即是美式规划中的Zoning（分区）；第一块土地如何招拍挂，也是从香港的土地管理制度中学来的。它们共同塑造了中国今天的城市空间和经济发脉络，但问题也逐渐暴露出来，需要我们主动地反思和修正。真正让对方国家能够接受中国规划设计理念的驱动力，不仅是中国建设在质量和设计手法上的创新，更是认同中国城市生长的方向和自我纠错的能力。改革开放40年我们培养了大批的建筑师、规划师，他们并非在国内没有业务，而是需要全球性的视角。

第五是品牌建设。目前中国的规划设计企业在国际上缺乏声誉、品牌和宣传。中国的设计师在全球做了很多项目，所在国人民也许会口耳相传地说“这是中国人设计的”。不过因为很多的项目属于政府对接的工程，设计师与当地居民并没有实际接触。所以在这个环节上，起决定性作用的除了企业自身的发展诉求，二是政府为了经济、文化发展的需要，去扶植一些企业，某种程度上将其“带”出去，让他们知道外面还有一片可作为的天地。我们还包括面向国际市场，现在年轻建筑师主动利用媒体平台报道自己的项目，一些老牌国际设计机构开始对中国年轻设计师有所倾斜，这些都是品牌建设的表现。

### 讲好“转型”的故事

#### CURRENT URBAN PLANNING TRANSFORMATION IN CHINA SHOULD BE HIGHLIGHTED

中国经济经历了三十年的发展，国土空间经历了重大重塑，城市建设、城市规模、住房水平发生了重大变化，现在城市建设已经进入高质量发展新阶段，以解决城市问题为导向，注重精细化管理。与此同时，中国倡导的“一带一路”也说明中国在全球经济中越来越重要的地位和担当，“走出去”、“一带一路”等政策倡议前赴后继地推动着我国境外产业园区的投资与发展。当下的中国同时处于急速现代化进程和全球资本主义潮流之中：在这样的大背景下，规划师需要以何种角色和方式，参与到全球发展和区域布局的新一轮挑战中？

归根结底，城市主要是供老百姓生活的，人气盎然的街区和社会才有真正的价值。规划师的任务是为人民创造融洽、相对稳定的社会和生活环境，这在任何政体和政治环境下都不过时。我们应当由探讨“中国城市都是依靠政府强力推进”的实践话语，回到如何讲好中国规划设计转型的故事——从空间设计向政策设计转型，由空间规划向政策规划转型。原来的规划偏重于空间、形态、功能、布局，未来的规划设计可能更偏向于顶层设计，具体工作就是政策规划、政策设计，这是我们现在应该努力的方向，也是可以即时分享给全球的“干货”。

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“走出去”时代中国规划的转型和经验分享  
THE TRANSFORMATION AND EXPERIENCES OF  
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# 城市解码人

## URBAN DECODER

文+采访/里斯本  
Text+ Interview / Lisbon



江西中路北京东路，一个典型的“外滩后街”路口。(摄影/朱寿)  
Middle Jiangxi Road and East Beijing Road, a typical "Bund back street" crossroad. (Photo / Zhu Qian)

当城市漫步果然如预期遍地开花之时，“考现”这个兴起于日本的概念又被出没于中国城市中的观察者们津津乐道。城市考现不以城市规模论英雄，比细致、比延展程度倒是令人心潮澎湃。快速发展中的城市遗珠遍地，考现团队和人士一边走、思考，一边感叹时不我待。解码城市表象之下的精神遗产考验着他们的智慧，在文脉的富矿之外，更加日常、更生活化的城市历史财富有待发掘，与之相比，考现人士的规模和可消耗的时间总量简直不成比例。一边在行动，一边要梳理和展示，城市在考现人士的手里被重新编码，呈现给居民和游客的是更可阅读的产品。作为上海外滩的考现成果，《外滩解码：城市考察发现笔记》这本非传统的城市研究书籍在近一年多的时间里，得到相当多且有持续性的关注。神秘的作者“红砖头”是上海红砖文化城市考现团队的机构化名，他们给本刊讲了讲外滩考现的感受。



《外滩解码：城市考察发现笔记》  
作者：红砖头  
出版社：上海人民出版社  
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上海是中国对外的窗口，她呈现出的面貌和经历不只代表自身，也是世界了解中国的重要门户。上海是一个旅游城市，全年无休地接待来自全国各地的游客。基于这两重目的，挖掘上海的历史与今朝，是一项很有价值的工作，也是一项始终在延展的工程。作为一家专注于目的地品牌咨询领域的企业，红砖文化协助上海市政府等相关机构进行城市形象海内外推广已有二十多年，与各领域机构在公关形象与沟通方面有密切的业务联系。这样的机缘，使这家机构有条件、有兴趣根据积累多年的城市调研素材，有计划地独立做一些文化项目。

在观察研究城市这个层面，红砖文化与《城市中国》颇为相似，可谓“爱好相投”。在红砖文化的办公室，有全套《城市中国》杂志。在研究城市的媒体上面，发声的大多是建筑师、城市规划学者这样的专业人员，文化界的声音居于相对次要的位置，话语权不高。红砖文化视这种现状为努力的动力之一，文化人士不像建筑师那样有建筑作品可以用来“发言”，面对缺少物质载体的劣势，制作出版物就成了表达观点的必由之路。

《外滩解码》是一本基于大量一手图文数据、经过精心编辑的城市考现书，是外滩后街调查项目产出的一项成果。这个项目完全脱胎于“红砖头”自己的主张，并无任何机构和人委托。红砖文化应用考现这种做法，与2011年他们对黄浦江全线展开调查时的经验有关。《外滩解码》中反映的“外滩后街”，不是一个严格的方志名称，是红砖文化自己命名的，大体上指中山东一路以西这一大片街区。顾名思义，就是“外滩后面的街道”。人们关注外滩一般都是看中山东一路表层和沿江的游览地带，但是在调查过程中，红砖文化的团队带着好奇心深入了外滩后街，发现这一带更有意思。

在2011~2012年间，红砖文化对黄浦江进行全线调查。从源头到入海口，把300里水路都走了一遍。两岸来回交叉走，做了大量的案头工作和现场记录，也做了大量的研究，最终出版了多本书和手册等。这些调查工作，使他们的后台形成了规模很大的数据库，也积累了多种关于呈现形式的经验。红砖文化曾为官方编纂主题出版物十余年，有过英、日文等多语种版本，出过二三十本书，所以外滩考现最终成书也是理所当然。

当时受到政府委托，红砖文化连续编纂出版杂志书《外滩生活》，内容比较偏旅游，是轻阅读性质的，投放在浦江两岸的酒店、消费空间和艺术场所。一边采访拍摄积累素材，红砖文化的团队一边思考“还能做什么选题”。团队中的上海人很多，外滩是大家公认最“挖之不尽”的公共客厅，大家决定走到它背后去看看还有什么，发现外滩的表面与后街是“面子跟里子”的关系，“里子”是民族资本的象征，能够辐射全国的历史。三年的调查基础支撑了《外滩生活》不断地改换新的角度，呈现各种故事，讲给来外滩游览的客人。比如“市民空间”专题，就是在调查外滩后街之后决定策划的。

2017年红砖文化终于决定单独为外滩考现项目出一本书。要把2011~2016年的多次考现融合在一个大的概念里面，作不一样的呈现，需要对外滩有一些新的理解。董事长暨项目发起人刘畅尹要求大家考现之后不能满足于拍照和采访整理，要把在现场的亲身感受都用文字写下来，细到鸟猪牛鸭、桥的大小、水的深浅之类，就像画速写一样。这种记录是把很多信息归纳提炼以后所作的个人呈现，是“咀嚼过”的城市读后感。收集到大量的数据之后，无论编辑、设计师还是摄影师，都会根据自己的判断先做一些“专业选手”级别的处理，符合一些基础判断的标准，项目发起人和创意总监再作总体把握，形成一个多次讨论、层层筛选的过程。在讨论过程中，大家当然会有一些不同意见，因为对每个个体来说，感动的点不相同。但彼此是有一定信任度的，凡是能够达到“感动级”的，一定有价值。创意总监林莹发现同事们陷入在“不知道该做什么才有新意”的难题中，只有自己是轻装上阵。她从小住在这一带，每次去外滩都要穿过外滩后街，去“真外滩”还不如去后街多，所以对后街每条街的属性都有自然客观的理解，比如五金电器、化工产品、教堂等。最终大家决定，要把人文观察作为核心，带着问题去考现，每个成员都要坚持用自己的视角去观察。对考现所得的素材，会用有弹性的标准去评判，哪怕是很碎片化的，也会尽量呈现其精彩之处，编辑到成果里面，因为城市的现实本身就是非常丰富的。

用考现手法挖掘出来的元素重新进行组合，自然容易往旅游路线推荐的方向走。做一本旅游导览手册或学术专著并非团队本意，这本书的定位应该是笔记而非指南。在《外滩解码》这个题目确定之后，红砖文化就确定要有“旅游基因”，也就是书中要有“线路”，让大家可以拿着这本书去外滩“深度游”，比如大家曾经想过“在外滩散步的N种方式”，提出过几百条参考路线。让游客在行走过程中逐渐拿到新的素材，这就是“解码”概念在线下的还原。“待解的码”包含很多不同的数字概念，包括门牌号、距离、时间等，分别指向不同的路线。再根据考现所得，选出外滩最能打动人的东西，包括声音、画面、一天中的不同时段、人文故事、建筑遗产等，按照既定的主题来确定架构、安排素材。从作者想讲、想表现出感动的正面视角，到吸引读者主动探索的反面视角，两条思路最终会师了。

来上海采访拍摄的海外媒体一直很多，官方机构接待时要对拍摄予以协助。红砖文化经常接到任务，会陪外媒记者走外滩。对方为了尽快抓住外滩叙事的内核，经常会问：“你觉得外滩像什么？”，“以前我都是理想答案的，从2006年开始我就固定一种回答了：外滩就是一个人。”在刘畅尹看来，一个人走过的生活道路，人会具有情感，跟城市是特别相像的。尤其是在全球化、同质化的当下，对一直做城市外宣工作的红砖文化来说，发现城市的“人性”，像谈论一个人一样去呈现城市的可识别性，完全是本能。

在外滩后街考现的实际行动也让红砖文化的团队成员们充分体



《外滩解码》的版式展示了各种考现思路 (图片来源 / 红砖文化)  
The layout of "decoding the Bund" shows various ways of modernology (Image Source / Destination Partner)

会到人性的鲜活。碰上老居民的时候,很多年长的人都愿意讲点儿故事。《外滩解码》的编辑之一熊楚天说起,在原业银行大楼顶上碰到过一对老夫妇,他们很骄傲地说,自己见证过东方明珠一天天建造起来的过程。虽然从外面看外滩后街的民居也没有什么特殊之处,但居民们有自己的一种满足感。熊楚天坦言,和同事一起开始考现的时候,才是她第一次到外滩。大学时候到上海来玩,都嫌外滩人多太挤,没想过要来看看。那时候当然也意识不到外滩后街可能很有趣,真走在这些街道中就会感觉到跟想象得很不一样。因为考现而去太多次以后,她就变成公认的“外滩小专家”了,对各种人文信息如数家珍,有亲友来上海旅游时,就可以游刃有余地带领他们避开人潮,在外滩后街体验一下城市的魅力。

作为上海人,刘畅尹和林莹斐则是借助考现刷新了自己对上海的感情。刘畅尹对滇池路青睐有加,说起电影《罗曼蒂克消亡史》开场镜头里的滇池路就激动不已,感觉到强烈的认同。她认为滇池路是真正的“摩登上海”,区别于西区的洋房上海,这种曼哈顿般的高楼和石头墙面“很锋利”,小时候走过都会害怕。在外滩后街考现,是走到“摩登上海”的身边去,了解这一面的上海究竟有什么不一样。都市繁华与弄弄市井都是上海的城市面孔,都需要多往深处看一看的历史。林莹斐也觉得,在策划、编辑过程中,梳理大量的信息,挖掘外滩后街代表了一种什么样的上海味道、渗透出上海人的一种什么精神,也会让人更懂上海。

完成外滩考现项目之后,红砖文化也加入了调查研究黄浦江滨江贯通的行列。这像是对2011年黄浦江全程考现的一种回向。当时没有现在这么便捷的电子地图可用,就靠一本世博期间出的地图

册,红砖文化DIY了黄浦江各区段细部地图,在办公室贴满了一面墙。7人团队在近三个月的前期准备工作之后,从当年5月开始,前后耗时近两个月,花了17个工作日,对沿江的寺院、工厂、学校、名胜等都作了考察记录。亲历者回忆说,当时浦江源头只有一块碑,附近杂草丛生,想拍照都没地方落脚,来往的少量船只都很小很旧,那时的调查很像“野外生存”。日本专家也不断送助攻,比如建议他们要关注渡口。整个项目最终以英、日文版《经典上海水文化之旅》书籍的形式呈现。刘畅尹说,8年前的黄浦江调查给他们最大的触动就是“我们真不了解上海”。从那以后红砖文化的胃口更大了,一直不断寻找上海值得发现的东西,尤其是文化的、生活化地存在的空间。

2018年新展开的黄浦江滨江贯通空间考现,用林莹斐的话来说,是要记录“可能会马上发生变化的地点或事件”。大家都感觉得到,上海的变化越来越快和剧烈。刘畅尹判断,滨江45公里贯通是一个很好的切入点,因为它正呈现了一种变化,所以外滩考现完成之后就组织团队着手走滨江。红砖文化联合了一支建筑专业团队作了前期研究,决定主要关注滨江贯通空间距离江岸1~1.5公里宽的这条带状的区域,这是滨江附近居民散步可达的范围。这次红砖文化制作了一系列短视频,反映曾经和正在滨江附近生活的人如何感受到贯通的影响。渡口也是项目关注的点。这次他们的考现目的也有转移,更多地去想调查研究怎么能够反哺给市民,所以把“45公里行走”中的“江边闲话”概念作为主题,呈现滨江居民的生活故事和奋斗历程,体现居民所代表的一种上海的特性,即为“母亲河”的内涵之一。

城市中国

Q

A

红砖头

**Q: 你们怎么看考现这种做法?**

**A:** 怎么叫它并不重要。我们2011年做完黄浦江沿线调查之后,从日本专家那儿听说了“考现”,才知道我们的工作方法跟日本时髦的学科“考现学”很相似。其实,随着今和次郎、藤森照信等日本学者的书近年来在中国流传,大家对这些方法都有所了解。

**Q: 为什么做完外滩考现想要出一本书?**

**A:** 2012年我们受日本都市计划家协会大会邀请去神户参与分享,也听了很多同行的分享。日本偏僻的小城市中一条很短的街道都有人研究并推动保育,我们国内的同行者却不多,上海这么大的城市,到现在才稍微多了一些机构和人对做这件事感兴趣。我们就想把考现成果公开发表,想过办展览、研讨会等,最终还是选择我们更擅长的出版物形式。《外滩解码》出版之后,我们办过一些线下交流活动,通过观众的反应积极程度,能感受到这项事业在国内外受关注的程度是有高下的。在日本做分享,大家都踊跃地一起讨论,很多与会者对我们的出发点和工作方法提出各种见解;上海的读者是会补

充各种关于外滩的信息,尤其那些外滩老居民们更是滔滔不绝如数家珍,有人甚至会嫌书读起来还不过瘾,想去现场多走几次。

**Q: 外滩考现得到的巨量信息要转化成书籍,你们如何做取舍?**

**A:** 最大的一个争论点在于历史的呈现,要不要呈现、怎么呈现、体量多少,是争执的核心。没有历史就没有现在。最终呈现中,建筑的历史保留了,历史八卦放在了封面展开的大海报图中,不去破坏书的结构和考现主旨,也把历史八卦和现存物质空间的联系画出来。出版前我们还做了些减法,去掉了可能对叙述有影响的一些内容。

**Q: 想过考现书的预期读者会是什么样的人吗?**

**A:** 我们没有做太多预设。书出版之后,文化界的前辈们、专家们反响不错。做这件事的文化使命感,让我们希望能更多给年轻人带来一些体会,愿意买回去读。还有上了年纪的读者看到书之后,特地把他们的事分享给我们,这也不断地丰富着我们的考现的视角。

考现学参考书



《一街一世界》  
编者: [日]赤濑川原平、藤森照信、南仲坊  
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对边走边逛看城市、从好奇或说研究的视角观察城市的人,都适合看这本书。一方面它是一本对路上观察学有方法指导意义的书,另一方面它也是一个大型系列案列展示集,主要是看东京街道细节。作者们自己认为,这本书是针对街上普遍存在的东西的图鉴。比如井盖或路锥、出水阀或埋在地上的界碑,以及道路的铺装等等。这本书可能属于考现成为一门稳定发展的“学问”之后产生的个性化作品集,也可以算是考现成果的二度演绎了。



《悠悠漫游城下町》  
作者: [日]安西水丸  
译者: 李洁  
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这本书收录的是日本首屈一指的漫画家及村上春树的御用插画家、更具非常个性的旅人安西水丸走访日本20个城下町的旅游日志与心情素描。虽然这本书的作者不是通常意义上的“考现学家”,但从书中我们可以发现,考现手法的个性化是非常有意思的,不仅体现出考现并不要求过高的门槛,而且让拥有不同特长和知识背景、成长经验的人们,能在考现过程中自由发挥。让不同身份的人都能记录下对城市的观察思考,这也是考现的价值所在。



《考现学入门》  
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城市中一切的日常现状都可以是考现对象,现象背后看不见的本质就是满足考现饥饿感的“食物”。“路上观察学”鼻祖今和次郎的足迹遍及日本、朝鲜,使用插画、文字、资料卡片等方式,对目力所及范围的一切都尽力予以观察记录,建立了考现学的基本模式。从关东大地震开始发展的考现学,延伸至包括路上观察学、生活学、民俗学等不同流派,逐渐对城市研究领域释放巨大潜能。藤森照信搜集整理今和次郎的文章编成本书。



《路上观察学入门》  
编者: [日]赤濑川原平、藤森照信、南仲坊  
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搞路上观察学的人,多为社会学者、建筑师、社区营造人士等等。这群人除了会将观察结果利用手绘图、照片或是文字记录下来,还会设计工作表格、规定记录准则、为特定对象命名,甚至举办团体活动。路上观察学的前身是考现学,是在破坏与重建之间对现时当下的记录。本书的三位编者就是这一领域的名家,他们1985年合作编纂本书,甫一出版就成为路上观察学的经典,在日本掀起一股风潮。

## Industry Globalization and Industrial Park Localization

Text / Kuang Xiaoming+Huang Zhengli

The era of industrial globalization meets the globalizing Chinese enterprises at the forefront. Production chains are extending progressively from the world factory of the Pearl River Delta to other corners of the globe. In China, there has been a series of initiatives such as “going global”, “capacity cooperation”, and “the Belt and Road Initiative” that encourage enterprises to explore new markets. Chinese investments appear in various regions of the world, accompanied by the rise of China's overseas industrial parks.


The increasing number of overseas industrial parks reflect changing patterns of the global value chain, the demands of late-industrializing countries for structural transformation, and China's structural upgrade. From the perspective of new structural economics, Dr. Justin Yifu Lin pointed out that the “Geese” are flying again, this time migrating from the second-tier countries to the third-tier countries. The “Flying Geese” will potentially achieve capacity transfer and advance industrial development in the late-industrializing countries. In this process, industrial parks play an important role by effectively bringing in FDI and industrial clusters, making use of policy incentives and reducing transaction costs. A team from Southeastern University led by Professor Wang Xingping's analyzed the status quo of Industrial Parks and Special Economic Zones in different regions of the world in their newly published “Belt and Road” industrial park series, and concluded that developing industrial parks has become an important means of industrial development on all continents. According to their study, there are more than 1,500 industrial parks of various types in Southeast Asia, over 500 in

South Asia, more than 1,800 in the Middle East and West Asia, and more than 370 in Africa.

China has gained a lot of experience from its rich developing history of industrial parks under unique conditions. The key conditions include coherent policy orientations among different levels of government, and the diversity in practices in developing zones in different regions. The increasing Chinese investment in overseas industrial parks has driven industrial clusters to “go global”, making them an important means of global resource deployment. It facilitates the developing countries to obtain foreign capital and thus share the development dividends. In this process, Chinese park managers are also facing an identity crisis for the first time. In China, the management model of the SEZs and IPs shows an integration between public and private ownership. The park owner-managers are usually government-owned-enterprises, which is a guarantee policy incentives and development momentum; going overseas, park managers as foreign investors become pure commercial entities, with a more delicate relation with the local authorities and the tenant enterprises.

In countries with less stable political development, park managers struggle between policy dependency and investment efficiency, and between eager domestic investors and resistant local politics. It is under these circumstances that *Urban China* choose to have an insight into the various industrial parks the Chinese investors are building and managing overseas, and examine these individual activities in a broader picture. First, China's structural upgrade has become the driving force for industrial clusters to ven-

ture into new markets; and the identity of these overseas investment is also reshaping and being reshaped by the development of industrial parks. Second, the construction of the parks is closely related to the development of the industry, and deeply rooted in the natural endowment of the locality. It also has a fundamental impact to local social development. In many late-industrializing countries, the parks and zones are generating unprecedented population movement and urban landscape changes. In places with unique border issues and religious environment, Chinese investments are also facing unanticipated challenges. In sum, the overseas industrial parks are being shaped by different forces including the development of the global industrial chain, the Chinese experience, local natural and social environments, and special geopolitics.

In this Issue, we start our journey from the southwestern border of China. We look at cases in Indonesia, the Middle East, East Africa, and West Africa. We explore a variety of industries, from mining to manufacturing, and we invite experts from different fields to explore the conception, design, planning, construction, and operation of China's overseas industrial parks, as well as their linkages to the global value chain, and their reflections on Chinese experience and impacts on local development. In these cases, we see the entrepreneurial spirit of Chinese investors, the rigorous environments of these explorations, and the lessons and successes of these investment ventures. These valuable experiences will hopefully become the lighthouses to guide the future adventures of the tireless Chinese investors and explorers. 

## From Pro Bono to Collaborative Industrial Parks Evolution of Sino-African Cooperative Model

Text / CHENG Cheng + XU Jiabo Translation / SONG Yating

In the new millennium, the topic of Sino-African cooperative development has been receiving attention worldwide. Such projects are not only large in capital scale investment with hundreds of millions of US dollars, but also in a variety of forms, which bringing a number of ‘outdated’ discourses in the field of urban development back to the mainstream, such as ‘industrialization’, ‘infrastructure’ and ‘industrial park’. Among these, the Sino-African cooperative industrial park model has attracted widespread interest among developing countries, especially in Africa. Notably, Ethiopia, Nigeria and South Africa have all intended to bring in the Chinese industrial park model to accelerate economic growth and fulfil their respective visions for development.

However, the practice of Chinese overseas industrial parks has long lacked a methodical summary and an instructive policy consultation. The lack of basic consensus between the two parties on the park's development model has in turn created very difficult situations for many overseas industrial parks. Many are struggling to survive. Sino-African cooperative industrial parks are not exception. Moreover, they are facing even greater challenges than other overseas parks on account of Africa's particular history and geographical conditions.

In such terms, with this short article I hope to briefly clarify the following three questions: 1. How did the Sino-African cooperative industrial park model take shape? 2. What are Sino-African cooperative industrial parks essentially about? 3. What difficulties have Sino-African cooperative industrial parks currently encountered and how to break through?

### Development of Sino-African Collaborative Industrial Park

Sino-African cooperation could be dated back to the early days of the People's Republic of China's establishment, rather than the early 21st century as Western media has portrayed. By then, Chinese-African cooperation had sprouted in the form of foreign aid, mainly as industrial and mining infrastructures, equipment sets, goods, and a small amount of financial assistance. In 1960, the Chinese government supported the construction of a match factory and a cigarette factory in Guinea. It was China's first cooperative project in sub-Saharan Africa. In 1963, Premier Zhou Enlai visited Africa and put forward the momentous ‘Eight Principles for Economic Aid and Technical Assistance’. It has since become the basic principle for China's foreign aid, manifesting core values such as independence, territorial integrity, mutual advantage, and non-interference in domestic affairs.

From the mid-1960s to the late 1970s, Sino-African cooperation had burgeoned, as China spared no effort to support the development of African countries. On the one hand, it was an attempt for China to help African countries secede from European colonial rulers and the suzerain states, on the basis of proletarian internationalism. On the other, China also needed backing from African countries in order to compete with Taiwan over the sovereign legitimacy in international status. The 1 billion RMB (approx. 143 million USD) interest-free loan for the TAZARA Railway's construction is the most exemplary foreign aid project driven by such factors. Its purpose was to help southern African countries gain freedom

against colonial governments and pressures from Rhodesia (editor's note: now Zimbabwe, to the south of Zambia), through upgrading the transportation of firearms and mineral resources. However, such projects exerted tremendous pressure on China's domestic economy. For a long time, China's foreign aid budget had accounted for approximately 6% of government expenditure, peaking at 6.88% in 1973. This figure was far beyond China's capacity at the time, and in fact, unsustainable for any country.

Therefore, from the late 1970s to the early 1990s, under China's Reform and Opening Up policy, its foreign aid scheme had been through effective contraction and adjustment. Domestically, after the downfall of the ‘Gang of Four’, China had evidently cut back financial supports for international communist movements, especially armed movements. In terms of international relations, U.S. President Nixon's 1972 visit to China marked the re-establishment of diplomatic relations between China and the United States, indicating the Western world's acknowledgment of the country's political power. And due to these internal and external factors, China had slowed down its large-scale foreign aid, without new projects being put forward.

By 1994, China's foreign aid has entered another period of growth, with the Export-Import Bank of China and the China Development Bank established. It was explicitly proposed that foreign aid should operate as a ‘smoother and engine’ for economic and trade cooperation, whereby mutual cooperation promotes the growth of African countries. With its first ministerial conference held in Beijing in 2000, the triennial Forum on



Local skilled workers are maintaining factory equipment in Eastern Industry Zone.



Inside Huajian shoe factory, Eastern Industrial Zone

China-Africa Cooperation (FOCAC) has been held 7 times since, gradually becoming a large-scale multilateral platform covering most areas of Sino-African cooperation, rather than an insignificant ‘meeting’ as in the beginning. This has sequentially established the mechanisms for cooperation on multiple levels, pinpointing a partnership principle of ‘win-win cooperation and mutual benefits’. It is within the FOCAC’s framework that the Sino-African cooperative industrial park model emerged, bringing the cooperation to a period of prosperity since 2007. To promote this model, a summit declaration and a ‘follow-up action plan’ were proposed, while departments concerned and policy banks have also provided supporting policies and funding. Since the proposal of the ‘Belt and Road’ initiative in 2013, China-Africa cooperation has been

in a new phase of transformation and adjustment. There has been stricter requirements for the cooperative projects’ sustainability; and ‘soft power’ in terms of people’s livelihood, environmental impact and capacity building has become a central issue. The park model guides China’s investment directly into African countries in ‘clusters’; local production creates jobs, brings tax income, and promotes African countries’ integration into global value chains. With these advantages, the model gained strong recognition from both China and Africa, and consequentially became one of the main modes of Sino-African cooperation.

#### What is Sino-African Collaborative Industrial Park?

The contemporary Chinese collaborative park model could be categorized under the concept of

‘Special Economic Zones (SEZs)’, whether in the form of Export Processing Zone, Development Zone, Economic and Trade Cooperation Zone, or traditional Industrial Park/Zone. The SEZ is fundamentally an infrastructure system that includes both hard and soft infrastructure. While hard infrastructure covers water supply, energy infrastructure and customs logistics, soft infrastructure mainly includes (customs) tax breaks, financial services and laws (to protect investors). Its economic logic leans on the following factors: the importance of foreign direct investment (FDI) to developing countries when their own capital accumulation cannot meet the needs of reinvestment; the weakness of the countries’ soft and hard infrastructures that severely obstructed the inflow and landing of foreign capital; the financial incompetence of developing countries

to construct large-scale, modernized hard infrastructures and update soft infrastructures nationwide. Under such causes, East Asian developing countries have created a model where certain suitable regions in the country are selected to attract foreign capital, within which high-quality infrastructures are built, and legal and financial systems of international standard are established. The industries usually benefit from the countries’ competitive advantages, such as human capital or natural resources, with products generally exported to the international market for foreign exchange rather than entering the domestic market. Therefore, this model was not invented by China, but shared by many late developing countries in Asia and Africa. For example, one of the ‘Asian Tigers’, Singapore, was one of the pathfinders of

overseas industry parks, bringing about projects such as the Suzhou Industry Park in China. Yet, since the 1990s, the booming industrial parks sprung up in China have not only stimulated growth, but also integrated China into the global economy at an unprecedented speed. With continuous upgrades, the model has generated worldwide impacts. Since the 21st century, China’s factor endowments have quickly shifted after two decades of rapid development. The growing cost of land, labour, and environmental conservation has continuously reduced producer surplus, making it difficult for China to retain low-end manufacturing. Thereby, China began to follow the ‘Flying Geese’ model and move its production to less advanced regions. In general, the manufacturing capacity of African countries is relatively low, as

many countries are still dependent on import in terms of starting materials, building materials, and even clothing. In this case, they can neither reserve foreign exchange nor increase production capacity for further development. Only when an economy is able to accumulate reserves through export-oriented industrialization, and ensure reinvestment for upgrading manufacturing equipment, can it create new opportunities for development. In 2003, a Chinese private enterprise (Henan Guojer Construction Group) built the first Sino-African industrial park in Sierra Leone, and achieved remarkable results within a short period of time. In 2006, FOCAC proposed to set up three to five overseas economic and trade cooperation zones in Africa. The following year, the Chinese Ministry of Commerce (MOFCOM) an-



nounced seven Sino-African cooperative parks. Today, although named differently, there are reportedly over 100 industrial parks in Africa that could be classified under the Sino-African cooperative park model. According to MOFCOM's statistics, 25 officially conducted Sino-African cooperative parks have created more than 40,000 jobs and raised nearly 1.1 billion US dollars in taxes, pushing forward the industrialization in African countries.

In terms of production capacity, China's current manufacturing output is approximately 1.6 times that of the US, and is equivalent to the sum of that of the US, Germany, and South Korea added together. As the largest industry in China, manufacturing is under pressure as the various energy resources are becoming increasingly unaffordable. Additionally, the rapidly growing national income has pushed up labour costs for manufacturing. In terms of international relations, in order to avoid punitive tariffs lifted by the Sino-US trade war, export-oriented companies in China aiming for developed markets have to seek ways to shift their final stage of manufacture overseas. Under such influences, a large number of China's export-oriented labour-intensive manufacturers (e.g. textile and apparel enterprises), as long as and some industries with saturate production capacity (e.g. building materials businesses), have all been relocated in the past decade. A considerable part of their production capacity has been shifted to new industrial parks in Southeast Asia and Africa, exemplified by some relatively successful cases, such as the several garment manufacturing parks in Ethiopia and non-ferrous metal processing parks in Zambia.

Theoretically, China's excess capacity is precisely what Africa needs, and thus industrial park should be an excellent cooperative model as its objective is to improve the manufacturing process. Yet in reality, overseas parks established by Chinese companies in Africa can hardly persist for more than ten years with a continuous growth. Most have not been able to achieve breakeven in the long run. In the end, they either close or survive on subsidies. This huge gap between theory and practice could be attributed to various difficulties faced by the Sino-African parks.

#### **Bottleneck and Opportunity**

Generally, the fundamental cause of the situation is that the parks' investors have copy-pasted the Chinese park model overseas without making

adaptation to the specific conditions of African countries. These include their political and economic background, social customs, legal systems (especially regarding land ownership), and their overall development plans for the industry. Having many successful precedents for industrial parks in China does not naturally guarantee the model suitable for development and operation in Africa. As far as the current Sino-African cooperative park is concerned, the following points are particularly worth articulating.

The first and most important question is who is the main body of the development of the collaborative park, and who owns the property rights. And then, who owns the property rights? Without consensus on these two points, it is impossible to clarify the logic of 'cooperative' development of the park. At present, the dilemma of a 'one-sided conversation' that most cooperative parks are faced with is often the result of obscure ownership and development rights.

In cases where the park is owned by a Chinese enterprise, the local government is usually unable to offer long-term preferential fiscal and tax policies such as tariff exemption and transaction tax reduction, and also lacks incentives to invest in or maintain the park. Moreover, since the Chinese foreign aid funding cannot be used for commercial purposes, financial aids and preferential loans are not legally applicable to the development of cooperative parks. Thus park developers can hardly break through the bottleneck of financing difficulties. As it is difficult to introduce commercial capital, the high initial costs for planning and design often rely on development finance institutions such as the African Development Bank. In the construction phase, while park developers yearn policy and in some cases financial support, local governments tend to believe that building the parks is a profitable act for Chinese developers. Not only are they unwilling to provide support, but they also hope to profit from the parks as soon as possible. Meanwhile, policy support from the Chinese government in the early stage, especially the small amount of financial support, further blurred the property boundaries of the cooperation park. Some Chinese companies depend too much on the policy or aid attributes of the park in their investment decisions, lacking sufficient consideration of commercial feasibility, or misjudging on operative problems. Second, China and Africa lack general agreement on the long-term and arduous nature of de-

veloping cooperative parks. The park is a combination of soft and hard infrastructures. For hard infrastructures including water supply, electricity network and roads, domestic industrial parks can now offer 'nine/ ten connections and one levelling' (nine/ ten types of infrastructure and land levelling). Contrarily, in Sino-African parks there could only be 'three/ four connections and one levelling', while soft infrastructures such as laws and regulations, tax and tariff policies, and customs clearance, are often not guaranteed. But even with these lower standards, the financial and time investment for infrastructures is still a burden for most African countries.

From the experience of Chinese industrial parks, the investment into industrial parks is a typical type of 'patient capital', often taking 6~15 years of continuous investment to profit. It requires long-term cultivation at the expense of short-term interests, so as to release spill-over effects in employment, property value, and industrial upgrading. However, the governments of African countries are generally facing tremendous pressure from elections and finance. A common expectation is that the cooperative parks can attract large investments from the Chinese government, and thus generate tax income and promote substantial growth of exports in a short term. The wishful thinking is to become the top nation in manufacturing output regionally. Treating the cooperative park model as a 'cash cow' has distorted the policy framework for the industrial park, causing a series of problems such as disconnected industrial chains and a worsening business environment, and further hindered the growth of investment.

Thirdly, China and Africa also lack consensus on the strategic significance of the cooperative zone to the national economy. The intention of industrial parks for many African governments is to address immediate problems such as unemployment, dollar shortage, and fiscal deficit. This has led to inadequate policy design, and also weakened the long-term impact of industrial parks on national economy and social transformation.

As mentioned, in a short term, the continuous taxation created by the cooperative park is incomparable to the government's one-time investment into infrastructure and substantial preferential policy support. However, its significance in the long run is to provide African countries with an 'access' to the global production chain. It could fundamentally elevate African countries' capabilities for self-development by introducing

advanced production capacity, technology and management experience into the parks with fitting soft and hard infrastructures. Nurtured with patience, the park could cultivate a modernized labour force and management talents to stimulate a 'spill-over effect' onto the entire national economy. Just like the billboards at the gates of many industrial parks in China, the significance of the cooperative park lies in 'building nests to attract phoenixes'.

The fourth prominent issue in constructing the Chinese-African cooperative parks is the different expectations of the industrial parks' development, reflected specifically in the unwise decisions on the parks' leading industries.

An extreme example is the blind pursuit of the so-called 'Ethiopian model' among some African countries. Regardless of disadvantaged conditions, which include shortage on strategic natural resources, severe drought, and a poor industrial base, Ethiopia has achieved a double-digit annual GDP growth rate in the past ten years, becoming a pole of economic development in East Africa. The prosperity of its industrial parks and the rise of its textile and apparel industry have also become successful experiences that many African countries are trying to replicate. In some countries, prime ministers or ministers even held meetings after visiting Ethiopia to request that the 'Ethiopian experience' be replicated to their own garment processing industry.

However, an easily overlooked fact is that Ethiopia has chosen textile and garment as the core industry under the 'comparative advantage' principle. It is the industry that benefits the most from the country's resource endowments: a huge labour force and a power system to supply low-cost energy that the nation put in ten years' tremendous effort to build. Such resource endowments are not available to every African country. Shaping their parks after another country's success unavoidably causes waste of resources and aborted projects.

The fifth is the lack of market visions in many cooperative parks. At present, most of the cooperative parks strategize manufacturing capacity and production towards North American and European markets. Only some of the mineral parks are oriented toward the Chinese market. Although it is reasonable in the short term from the perspective of Chinese enterprises that relocated their business, it has also put the parks under great limitations and high risks.

On the one hand, developing countries have already accounted for over 55% of global GDP, with a rising per capita income. With big potentials in consumption, they will greatly contribute to the future market growth. Without such a global vision, cooperative parks could not fully foresee the possibilities and construct an effective development framework. On the other hand, in recent years, European and North American countries have turned to protectionism. The GSP trade principles have undergone damages, as the US removed three East African countries from the African Growth and Opportunity Act (AGOA), and Cambodia loses the EU's 'Everything But Arms' (EBA) trade preferential treatment. Focused solely on developed markets, the park will fall into great risk once the rules of global trade change.

The last imminent issue is that technological innovation is likely to challenge the fundamental logic of China's industry relocation soon. For a long time, Africa's low labour costs have been regarded as a significant advantage in labour-intensive manufacturing. However, in recent years, artificial intelligence and production robots are entering the manufacturing industry, replacing a large number of jobs in increasing speed, especially in those more developed provinces of China. The combination of AI and robotics not only greatly reduces labour cost in production, but rather, makes 'reverse industrial transfer' possible. Nowadays, European and American sports shoe giants have started to use 3D printing to produce high-end personalized products. Some Chinese high-end clothing companies have also set up factories in the US to manufacture special designs with advanced technologies, which almost completely automated the cutting and trimming process that has long been considered a manual work.

Under such circumstances, will automation defy the value of cooperative parks? As an important drive for China's manufacturing relocation is rising labour costs, does the industry still need to be moved abroad if labour could be replaced by low-cost machines? In addition, although some researches have shown that automation does not cause widespread unemployment, an important premise of this assertion is the upgrade of education and labour skills. In Africa, the general reality of low education level and low productivity is still a huge obstacle. Whether the speed of education and training can exceed automation

advancements is a question that all overseas industrial park operators have to think about.

Since FOCAC 2018, on the one hand, under rising comprehensive risks, especially debt risks in Africa, China has encouraged more enterprises to invest in Africa by building factories, as corporate direct investment has increased regardless of stricter approval procedures implemented on non-policy financing. On the other hand, with the growth of China's economic, it is inevitable that the proportion of foreign cooperation funds in the form of a gift will increase. If these funds can be used on industrial parks, it may be most productive in terms of development. From this perspective, the prospects for the Sino-African cooperative industrial park are extremely bright.

Facing the current predicament, both Chinese and African partners have begun to seek breakthroughs and take measures. Recently, MOFCOM announced that it will provide funding to upgrade 25 Chinese overseas economic and trade cooperation zones in Africa, to upgrade infrastructures, build environmental protection facilities, and improve services such as sewage and vocational training, thereby enhance the system of cooperative parks.

For a long time, as the country of the highest comprehensive development level in Africa, South Africa has been practicing different industrial park models. With the government and domestic enterprises as the main bodies of construction and operation, the parks attract foreign investment without facing the ownership dilemma of industrial parks. In South Africa's current seven parks, Chinese manufacturing giants Hisense Electric and Beijing Automotive, as well as world-class enterprises such as Mercedes-Benz, are operating well. This 'South Africa model' of cooperative park that operates on 'African ownership' could become a valuable case study for China and other African countries.

Over the past 70 years, the cooperation model between China and Africa has undergone tremendous changes. Moving from pro bono to co-development of industrial parks implicates the change of logic in China's foreign cooperation, and moreover, signifies an active move for both China and Africa. The objective of 'development' has created a cooperative platform filled with win-win opportunities for both parties, making it no longer a one man's battle of a single country. 🍌

## The Indonesia Morowali Industrial Park: Thinking (what is) outside the box

Text / Mary Silaban

Sitting in one of the most prolific nickel zones in the eastern part of Indonesia, Zhejiang based Tsingshan Group and Indonesian Bintang Delapan Mineral Group have established an industrial park that helps Indonesia add value to its vast, easy-to-dig laterite nickel resources. Just like any other Chinese project, the Indonesia Morowali Industrial Park (IMIP) runs in the speed of light. In less than five years, the industrial park has been in full operation, producing all nickel-based products from its more than 10 tenants with more to come. Just outside the park, the community is unable to keep up with this new style of development.

IMIP is probably one of China's investments in Indonesia that has had gotten so much attention and privileges. Occupying a 2000 hectares of land in Fatufia and Labota villages in Morowali Regency in Central Sulawesi Province, the industrial park work wonders for Indonesia, a resource rich nation that has been struggling to add values to its mining commodities. With all the facilities literally in the backyard, it is fair to say IMIP is the most integrated industrial park in Indonesia.

"Everything needed by our tenants are here. This is a well integrated nickel-based industrial complex. This has helped us keep the cost economically," says Irsan Wijaya, a high rank officer at IMIP. The park has its own steam power plant of 2000 MW, 25 jetty ports with capacity ranges at 2500 DWT, 5000 DWT and 8000 DWT, water treatment facility, oxygen plants, housing facility, health facility and a brand new airport with an 1800-meter runway that is expected to be in operation soon.

While this is purely private investment, the In-

donesian government is not lacking in support provision. Outside the industrial park (where the license is granted by the Central Government through the Ministry of Industry), the Ministry of Industry established a metal specialized poly-technic whose graduate would be ready to work in any of IMIP's tenants. Mandarin language course is in the curriculum. The Ministry of Public Work has built low cost apartments for IMIP employees at affordable rental cost, not far from the industrial park. The agreement to establish the industrial park was dated back in 2013 under a business-to-business agreement witnessed by presidents of the two countries, Susilo Bambang Yudhoyono and Xi Jinping in Jakarta. President Joko Widodo inaugurated the park in 2015, at the same time of the first nickel pig iron (NPI) export from IMIP to China. To date, the industrial park has received endless visit from high rank important figures in Indonesia. High rank officers are ready to dismiss any negative publication regarding the industrial park, such as the question of illegal workers from China working in the project. IMIP is indeed vital for Indonesia. It proves that a downstream industry can be built in Indonesia, regardless the cost. This is the dream of many Indonesians for many years-to end the fate of Indonesia as a mere exporter of raw commodities.

The complex now hosts a number of manufactures whose products are all nickel-based; NPI, stainless steel, hot rolled coil, cold rolled coil, carbon steel and raw material for lithium battery; most of them are Chinese companies. The products are shipped to international buyers. More tenants are expected to join the industrial park, especially in projection of growing needs for bat-

tery for electric vehicle.

The perfect combination of Tsingshan – Bintang Delapan Mineral's experiences in the business has helped the park grow into an impressive industrial park in the blink of an eye. While the Tsingshan Group holds the knowledge and expertise in nickel processing industry, the local partner, PT. Bintang Delapan Mineral knows how to do mining business in Indonesia. It runs a 47,000 ha of nickel concession with a yearly production to up to 6million tones. It is widely reported that the company is being backed up by some powerful figures in Indonesia.

The presence of IMIP has brought significant impact to the people in the surrounding area. Almost all local people now work that has also attracted people from nearby villages to come and work for the industrial park. As a matter of fact, the regency recorded an open unemployment rate of 2.9%, lower than national unemployment rate of 6%.

"I am very happy to work for IMIP," says Dita, a girl who works as cleaning service at the IMIP's housing complex. The paycheck is also rather handsome. She receives Rp 4.4 million salary every month, one day off a week and 15 days off every half a year. Housing and restaurant businesses are mushrooming outside IMIP, catering the needs of more than 30,000 workers. Since 2015, the Morowali regency has recorded significant increase on its Original Local Government Revenue. Quoting the report by the Morowali's Statistic Bureau, the regency received Rp 181 billion (RMB 90million) up from Rp 85billion (RMB 42million) in 2015. The industry park is said to have contributed \$100 million to the gov-

ernment in taxes.

The industrial park has literally brightened up the lives of people of the surrounding area. Prior to 2015, the year of establishment of the park, people had lived in the dark as the state electricity company couldn't afford to bring electricity to the area. IMIP sells 60MW of electricity from its power plant to the state electricity company, as part of its CSR program.

The fast pace of industrialization of the area however comes with its negative consequences as well. Outside the industrial park's gate, everything looks messy. An official data records 1000 families living in the area, while the number of Indonesian workers working at IMIP is 33,000. The presence of IMIP has truly promoted workers migration from all over the province. Young girl like Dita does not mind leaving her hometown to Morowali. "There is no jobs available in my hometown," told Dita who shares the room with another 3 girls at the low cost apartment built by the Ministry of Public Work. Long lines of hopeful job seeker waiting for interview is a daily scene at IMIP's main office.

Mr. Ihsan, a local residence who works as contractor for the industrial park, is complaining the traffic jams outside the complex. He is no native of Morowali, but his wife is native Morowali. He decided to move to his wife's homeland for the sake of working for IMIP.

Thousands of motorcycles park outside the industrial complex, occupying the already narrow Sulawesi Provincial Road. "Accident happens everyday here," says Mr. Ihsan. Shifts in and shift out happen at almost the same time. "It is crucial for IMIP to manage the traffic of employees' in

and out better," says Mr. Ihsan who suggested IMIP should build an alternative access into the industrial park to reduce the traffic at the provincial road. When being asked about this, Mr. Djoko, a spokesperson of IMIP says the company is aware of the situation outside the complex. "We are improving it. We have built the drop off facility for employees to reduce the traffic congestion in front of the complex," explains Mr. Djoko. The poor motorcycles driving safety is another contributing factor. To solve this, says Mr. Djoko, IMIP is ordering 20 units of bus for the employees.

Environment is also another issue for the local people. The air contains the dust from coal used by the power plant. The thrash in the ocean (and on the road), is another issue for the local people. "You barely see any trash bins here and the ocean is full of waste," complains Mr. Ihsan.

Mr. Djoko admits that the situation outside the complex is rather messy. "This is a consequence of very fast industrial development in remote area. The local government is not ready to deal with this," says Mr. Djoko. This situation is, as a matter of fact, a typical problem faced by less industrial regions in Indonesia.

Mr. Ihsan is hopeful that IMIP should have a serious conversation with the local government regarding the living conditions outside the industrial park. "Things are very different at VALE. The area is very neat and tidy," says Mr. Ihsan, taking Brazilian Vale's as an example. Vale's plant is 5 hours' drive away from IMIP. Everyone who has visited both locations would agree that Vale has made an excellent community management. However, it is important to understand that

Vale and IMIP is not apple-to-apple comparison, as Vale's is not industrial complex but smelters, mining, power plants and ports. "What we have heard is that China is a very advanced country. We hope to see the proof here in our neighborhood," says Ihsan.

In one interview, Mr. Putu Suryawirawan, a special advisor to the Minister of Industry and a strong supporter of IMIP believes the current problem is outside the industrial park. "The industrial park is up and running well. It is the area and community outside that need special attention," says Mr. Putu.

Unfortunately, no local government representatives were able to make comment on the future planning of the region. The presence of the industrial park poses both threat and opportunity that need to be wisely managed. If properly managed, the land values of the Morowali area would increase, thus inviting more investment. In the other way around, the expansion of the industrial park would damage the area wholly.

The industrial park is set to be bigger; it would expand to 3000 hectares from the current 2000 hectares. There would be more people, more businesses coming to the area. More coals would be consumed (today the park consumes 7 million tons of coal every year), and more waste would be produced. While the development inside the industrial park would be nice and green because the park management needs to keep the tenants happy, the outside area would be suffering.

Whoever is in charge of the presence of IMIP really needs to think out of the box of the industrial park. ☞





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