

世联地产顾问丛书

楼宇经济

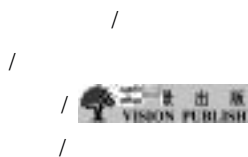
都市商务的造场运动

Buildings and Commercial Districts

世联地产 编著

and living with three head siblings
\$NO 1.1890 / 1.18493

“ ”



2011 6 1

170mm×242mm·10.5

021-31356109

0755-22162507

010-85678108

028-85552670

0531-82593617

<http://www.worldunion.com.cn>



2010

139		630		GDP
39		10	7	50 50
“	”	60%		
		“	100 ”	“ ”

—

IT

CBD

2011 6

目 录

Contents

1		
2		
2	1.1.1	“ ”
3	1.1.2	
4	1.1.3	
5		
7		
9		
9	1.4.1	
10	1.4.2	
10	1.4.3	
13		
14		
15		
16		
16	2.3.1	
17	2.3.2	
17	2.3.3	

18			
19	2.4.1		
20	2.4.2		
20	2.4.3		
21	2.4.4		
23			
24			
26	3.1.1	---	
27	3.1.2	---	" "
29	3.1.3	---	CBD
29	3.1.4		
32			
33	3.2.1		
35	3.2.2		
39			
42	3.3.1	---	
44	3.3.2	---	
45	3.3.3	---	
48			
50	3.4.1		
51	3.4.2		

53	3.4.3	
55	3.4.4	
57		
60		
61	3.6.1	
62	3.6.2	
66	3.6.3	“ ”
68		
68	3.7.1	“ ”
72	3.7.2	
74	3.7.3	“ ”
79		
80		
80	4.1.1	
85	4.1.2	
98	4.1.3	
100		
101	4.2.1	
110	4.2.2	
117	4.2.3	
119		
120	4.3.1	
130	4.3.2	
139	4.3.3	

143	•			
144	•			
145	•			
147		5.2.1		
148		5.2.2		
149	•			
149		5.3.1	or	---
151		5.3.2		or
151		5.3.3		or
152	•			---
154	•			
158	•			
161	•			





1

2002 1 ———
“ ” 2003 2
2004 6 2005 11 3
5.6 4.3 3.5 7.62
50 52.6



1-1 2002 ———

2007 10
“ ”
2005
4.3 2007 7 27.6%
2005 3.5 2007 5.9 29.8%
—————

1 - 1 2007

	56 000	124 747	49.4%
	—	72 677	—
	43 000	70 743	27.6%
	35 000	59 154	29.8%
	21 000 2006	29 581	38.1%

“ ”

“ ” “ ” “ ”

IT



1-2

2% 4% 94%

“ ”



21

655 “ ” 183 “
” CBD

2010 600

2009 320

5 150

2006

200

200 200

2009

486 335

151 5

<http://house.hexun.com/2007-11-26/101750476.html>

“ ”

2009 6 29 06 <http://paper.people.com.cn/gjjrb/html/2/Ü9 p> / ũ m/ // 6 / 3

“ ” 50

3

120~125

15

4 000 2020 7 000

5 100

1-2

1 - 2

14 460	954	35.53	3 500
14 790	617	18.65	5 100
5 650	303	7.61	2 200
2 330	663.5	12.63	4 000

GDP 2008

655 “ ” 183 “ ”

7 000

CBD <http://finance.stockstar.com/JL2009070200001280.shtml>
P183

http://en.wikipedia.org/wiki/List_of_cities_by_GDP

GDP

CBD

CBD

CBD

CBD

CBD

CBD

| | |

110

200

CBD

CBD

CBD

CBD

CBD

4

200 2 000

1

CBD

CBD

<http://www.cass.net.cn/file/2005101446903.html>
<http://www.cass.net.cn/file/2005101446903.html>





1

| | |

24

<http://www.cqvip.com>

90

()

:

1

2

3

|

|

|

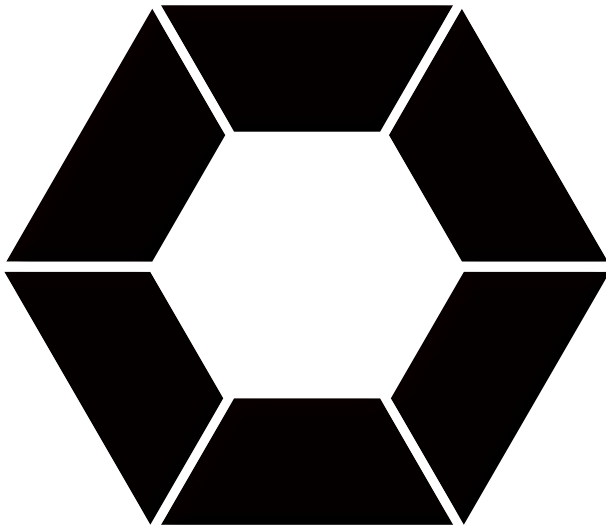
4

|

|

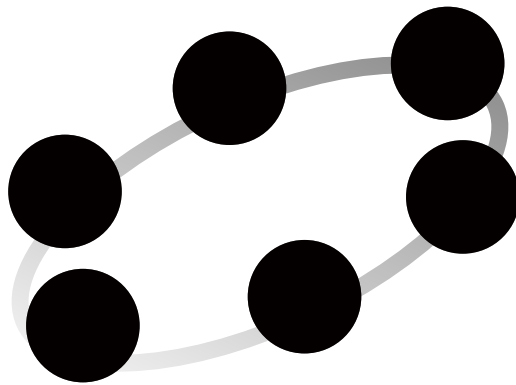
|

2-1



2-1

-



2-2

“ ” “ ”

CBD

20 70

RER

1 14 2

| | |

67

CBD

CBD

<http://tieba.baidu.com/f?kz=256010581>

p7

“ ”

CBD
<http://www.kesum.com/zjzx/mjzl/beijin/xuchou/200901/102790.html>





1624

Brooklyn

Manhattan

The Bronx

Queens

Staten Island



1 800

4 300

57.91



|

|

|

7% 150

1.54

1

“ 911 ”

19

1926 1931
77 305 1930
1930
20
22 19

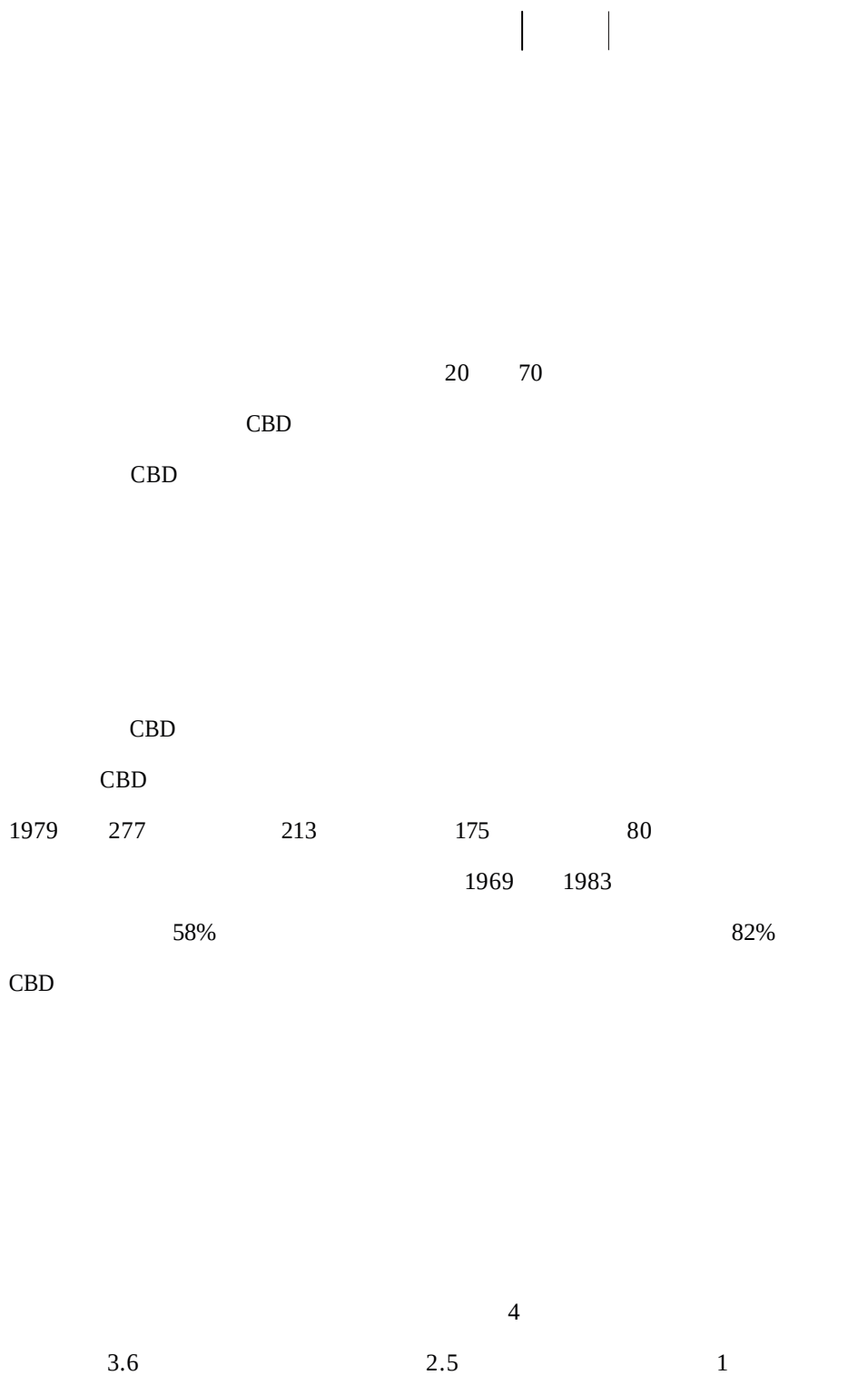
<http://zh.wikipedia.org/wiki/%E6%B4%9B%E5%85%8B%E8%8F%B2%E5%8B%92%E4%B8%AD%E5%BF%83>



3-1 “ ”

20 80

(Times Square)



|

|

|

Đ

3-1

| | |

20 105

230 2009

-

-

1 149 2007



2 900

1 500

20 50



50
(Grands Boulevards)



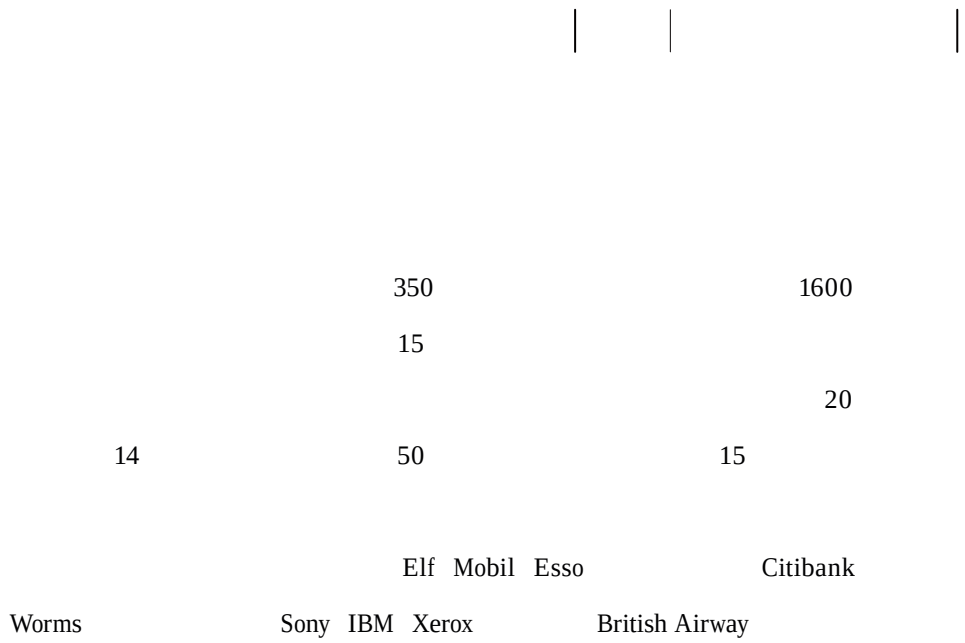
3-3

20 60

(La Defense)

250 40 160

2 000 30 350



|

|

|

3-4

RER

1 14 2 35

1970 (Regional Express Tra ụ v ụ n Ò

) 250

1973

“ ”

1974 1978

32

12 20



1 100

2 200

1 580

2004

3 650

17%

17

20

“ ”

20 80

1 400



3-5

<http://zh.wikipedia.org/zh/%E4%BC%A6%E6%95%A6>

17
(IFC) City of London
“ ” Square Mile
3 100
50 90 500
470
1 000 — 13 60

2006 3 2001 2005
1992 16% 20%
27% 31%
500
1/3
800 170
“
”

http://zh.wikipedia.org/zh/%E4%BC%A6%E6%95%A6
“ ” 2007.2

|

|

|

20
() Westminster
IFC
1 65.5

“ (The Strategy of Containment by Zoning) ”
CBD



3-7 Westminster

(Communities)

CBD

(Dockland)

22

20 60

(

) ()

CBD

1980

“ (Dockland Project) ”

(Enterprise

Zone)

203

Canary Wharf

28.2

22 26

112

93

10

——235.1

2006

|

|

|

|

|

|



		23		26	5	8	
2009	10	1		1 299		2 188	
				2009	GDP	18 771	6
		10		3.7		23	



| | |

621 2005 845

58% 47% 84% 50

90%

8 4 000

2 900

20 20

80

IFC

1 700

60 11.33

7.14 2006 123

20%



3-9

2

20 50

1958

|

|

|

—

3 - 10

3 - 10

6

30

90

16.4

200

<http://wenku.baidu.com/view/1e3ea91252d380eb62946d50.html>

30

12

400



3-11

1970 10 1.6
3

1986 1990 “

” “ ”

/ /

90 “ ”

3-2

	120	693	160		
	100	160	30		
	150	250	106	“ ”	

1995

1996 3 “ ”

1995 4

“ ”

1993

11

1995

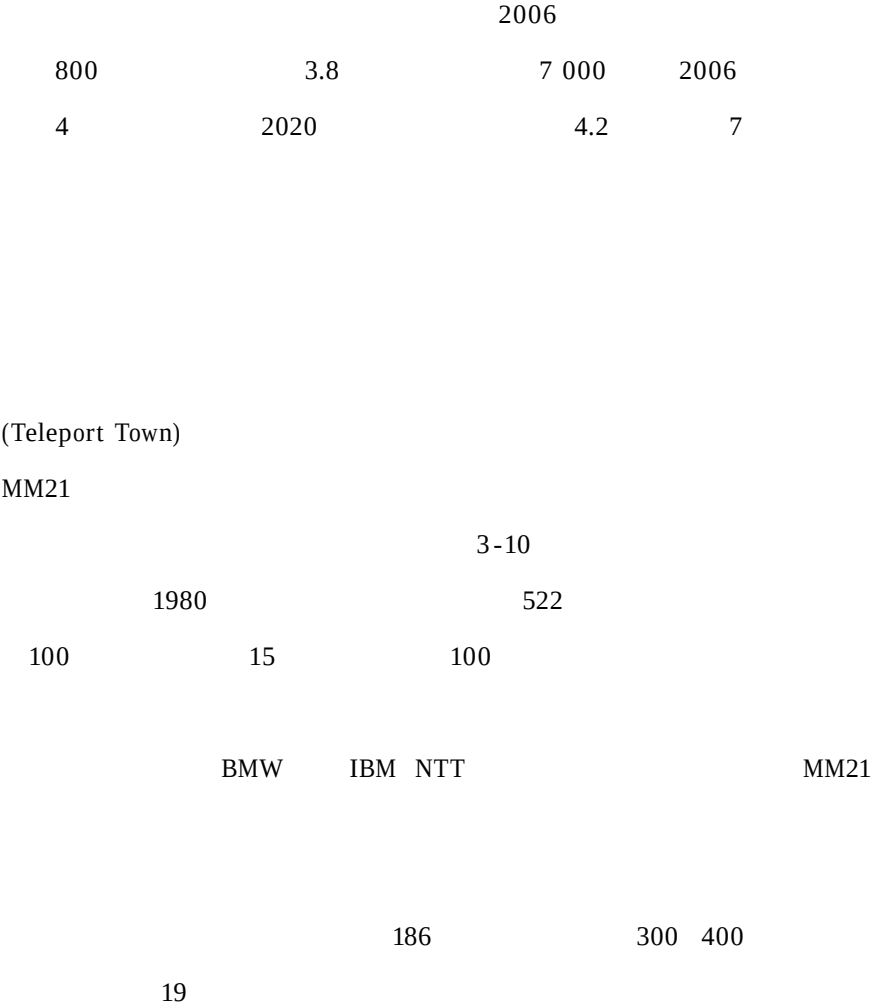
“ ”

1996 “

”

1999

2002 “ ” “ ”



MM21

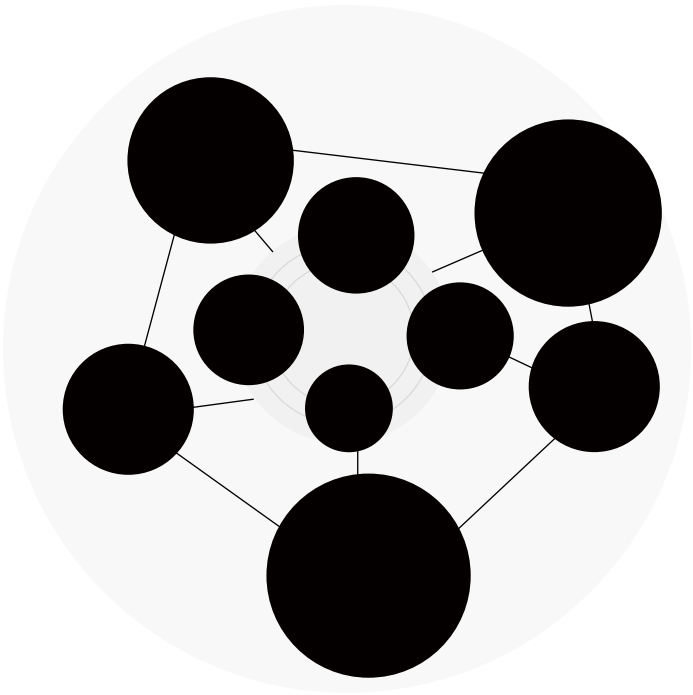
“

”

()

1982 1987

380 1988 1992 696



3-12

|

|

|

$\tilde{\omega}$





3-3

|

|

|

3-3

|

|

|

20

“ ”

.....

“ ”

|

|

|

3-13

3-4

|

|

|



|

|

|

|

|

|

()

()

()

|

|

|

“

”

“

”

“

”

“

”

“

”

“

”

“

”

“

”

“

”

1

——

|

|

|

2 —

“ ”

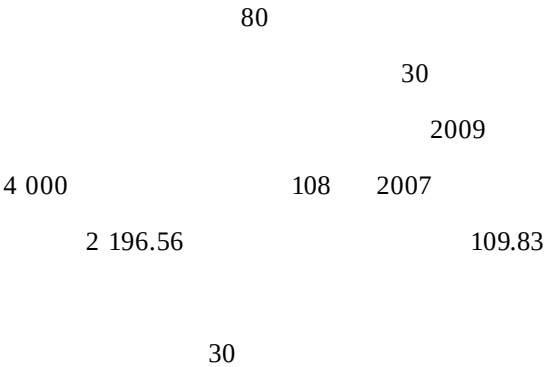
3-5

3-5 “ ”



| | |

CBD



19

“ ” “ ”

“ ”

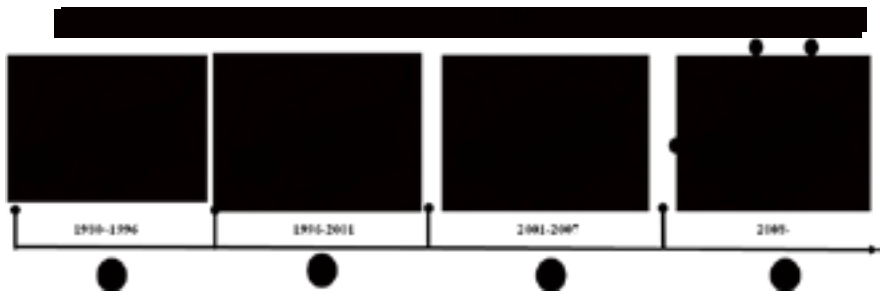
20 30

80

90 “ ”

2001 WTO

3-14



3-14

• 1980 1996 1980

1995

● 1996 2001 “ ” “ ”

“ ”

CBD CBD CBD

CBD CBD 5

● 2001 2007

CBD

CBD 2000

|

|

|

“

”_____

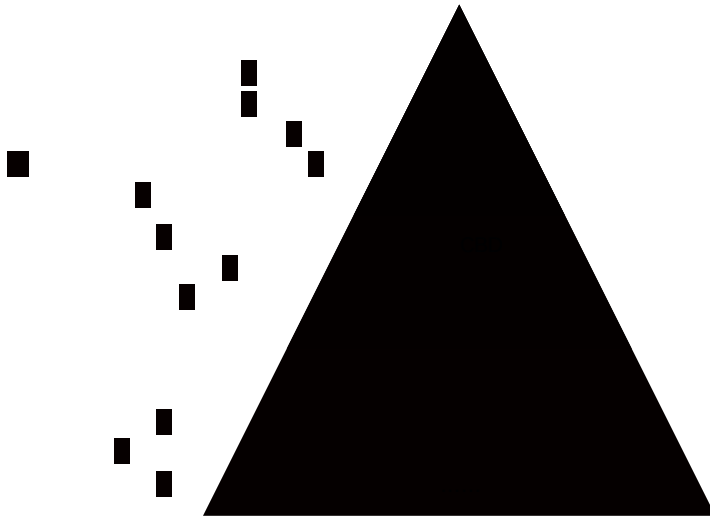
•

2008

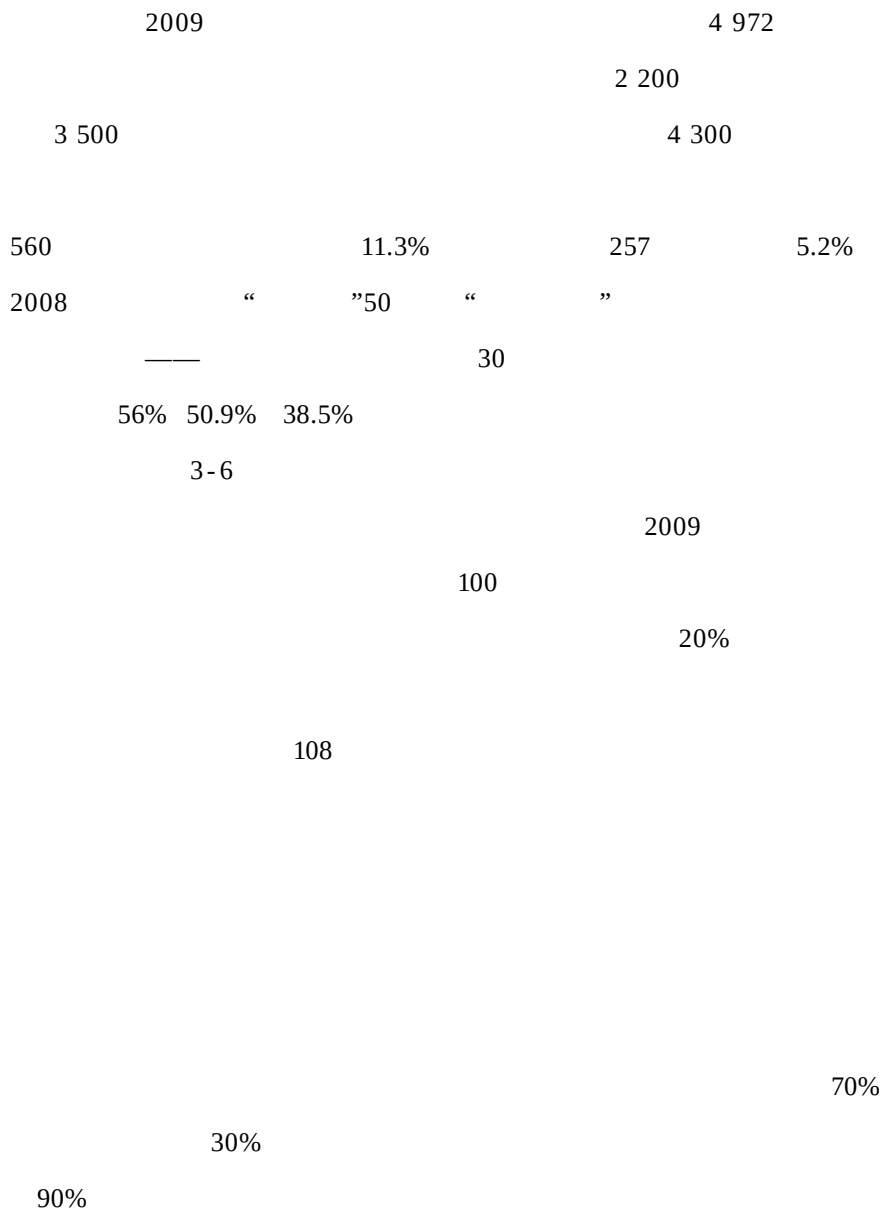
CBD

CBD

CBD



3 - 15



“ ” <http://house.focus.cn/news/2008-08-24/521549.html>
<http://house.focus.cn/newshtml/617773.html>

3 - 6

2007	184.37 72.23		30 57.2 52.4%	
2008	122		70% 11	500 80
	390 245		2004 2.1	
	114.5 78.5		2006 8 5.6	
	180		50%	1 900
	100 2010			
	100 2010		1	
	45			
	80			

| | |

2001

“ ”

3-7

--	--	--	--	--	--



3-16

“ ”

“ ”

“ ”

3-8

2012

13

510

310

439

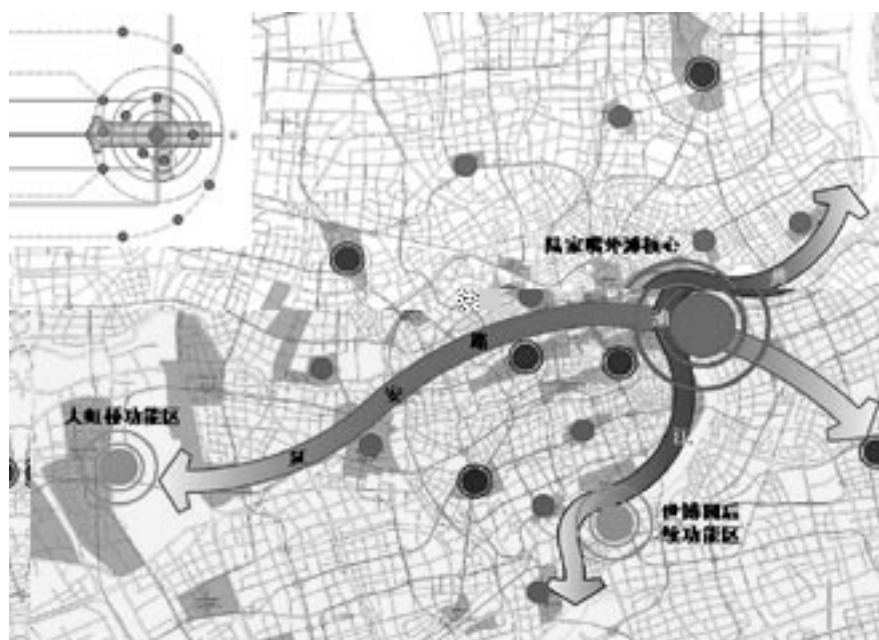
3-8

		96	216	829	1 117	1 431	1 833
		15.21	62.92	169.40	262.83	264.30	355.05
		128.71	538.99	1 457.32	262.83	264.30	355.05
		8 944	28 270	65 569	81 395	112 798	131 837
		42	62	77	77	114	114
		4	5	6	7	7	8
		2	2	6	6	6	9

2

“ ”

3-17



3-17



|

|

|

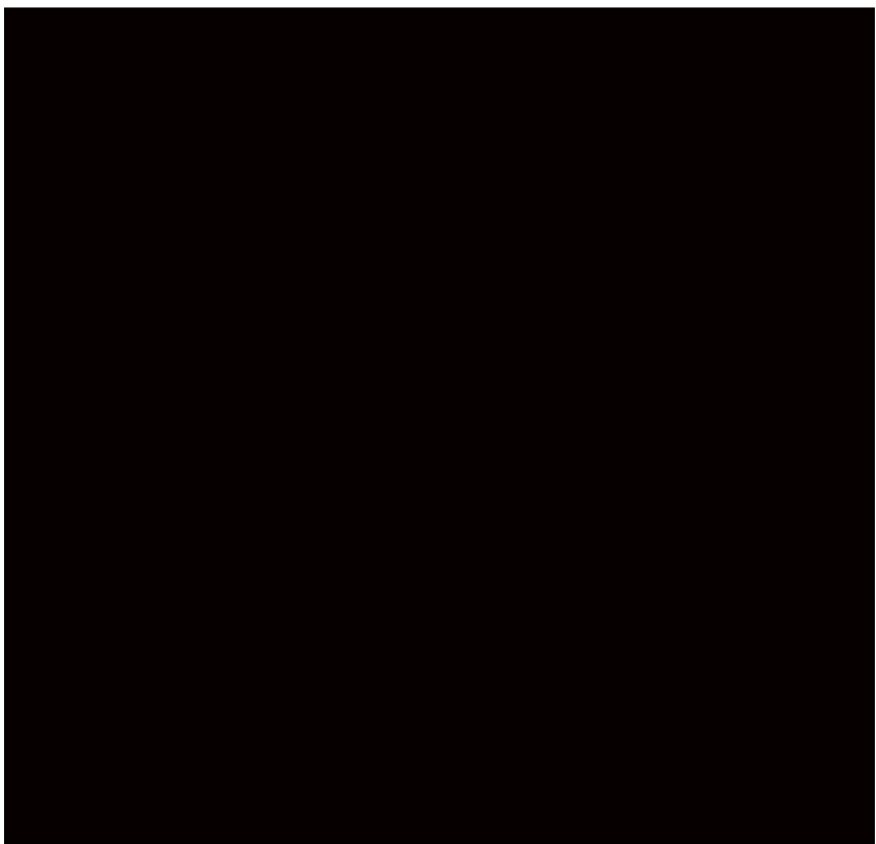
I

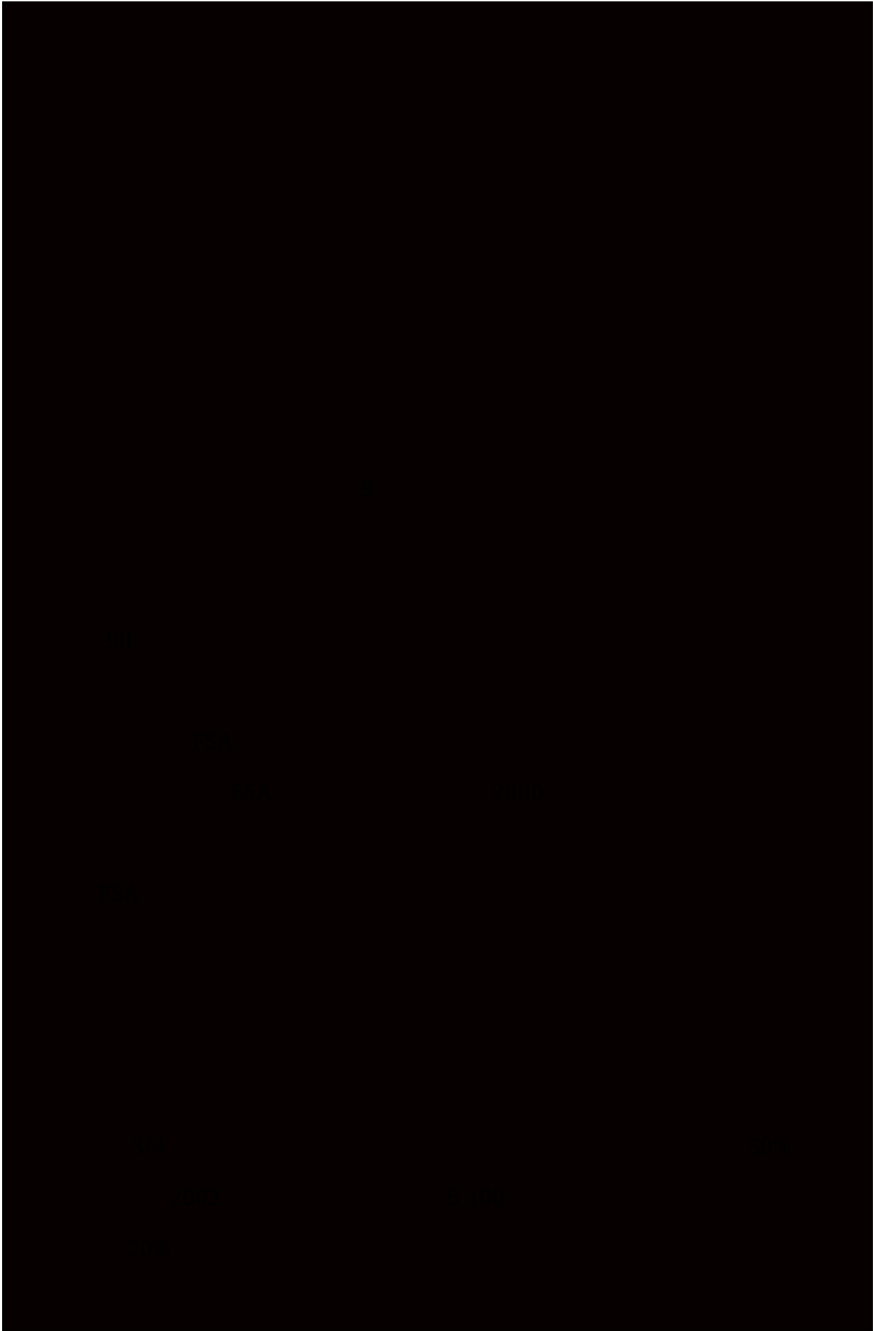


|

|

|





|

|

|

1

2

3

2006

42%

|

|

|

4

40

33

10

| | |

1990 1990

4

“ ” “

” “ ”

1991

1992

1995

CBD

1991 10

3 3

274

600

4

50

“

”

“

”

4 6

6

6 32

20

1996

3

1984

324 95

383 95

68

| | |

“ ”

“ ”

2001

8

40

18.8

2004

2007 11 19

439

f

4

1



4-2

4.6

38

135

106

14.85

1

4

| | |

“

”

50

177

59.5

30

40

55

18.8

26

2

2008

7

25

“

”

300

17.6

15

“ ”

1913

“

”

1998

1999 3

2001 3 5.7

“ ” 65
50 28 15

|

|

|

300

.....

20 30

2007

50 60

1.3

—

177

80

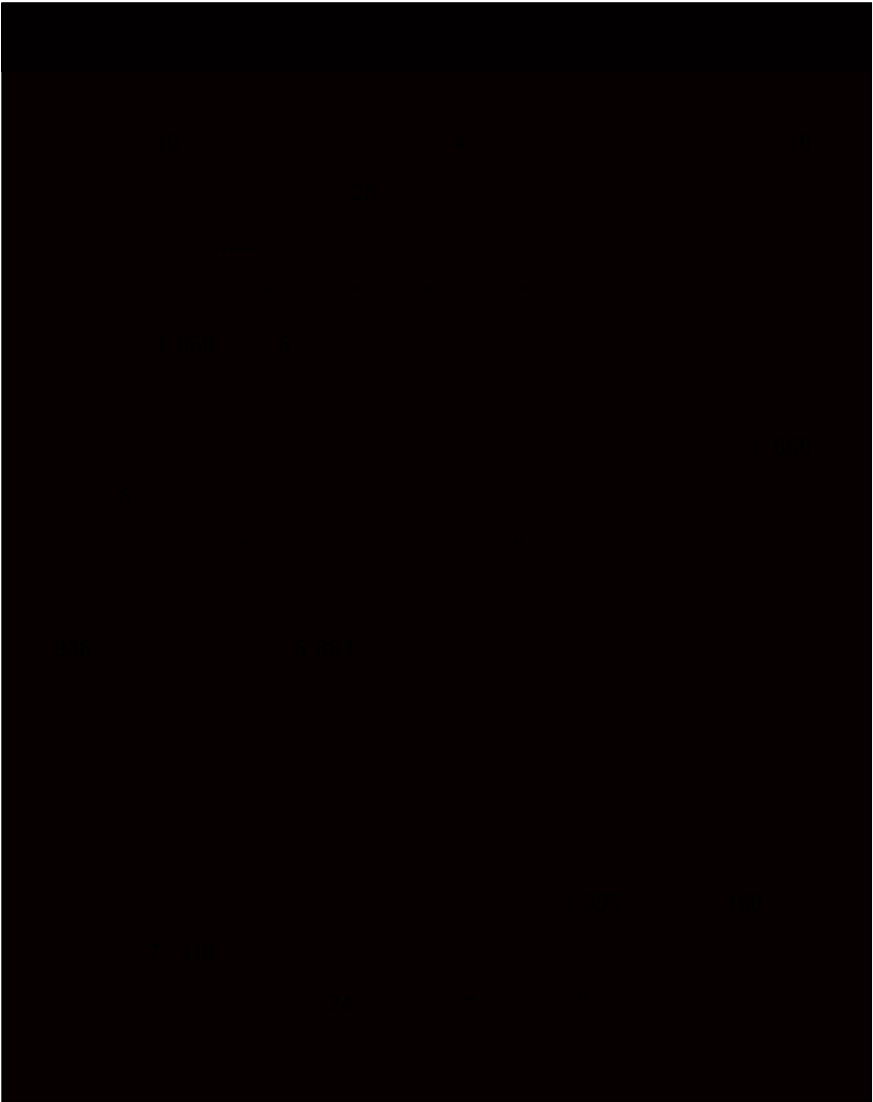
2001

|

|

|

2007 12 106





4 - 4

|

|

|

| | |

“ ”

2002 10

7.7

55

40

“ ”

2005

“

”

| | |

“ ”

“ ”

1666

4

87

44

13 000

20 60

CBD



1958

9 9 EPAD(Public

Establishment for The Development of La Defense Region

) 750

250 30

43

1 600 5 200



| | |

190 15

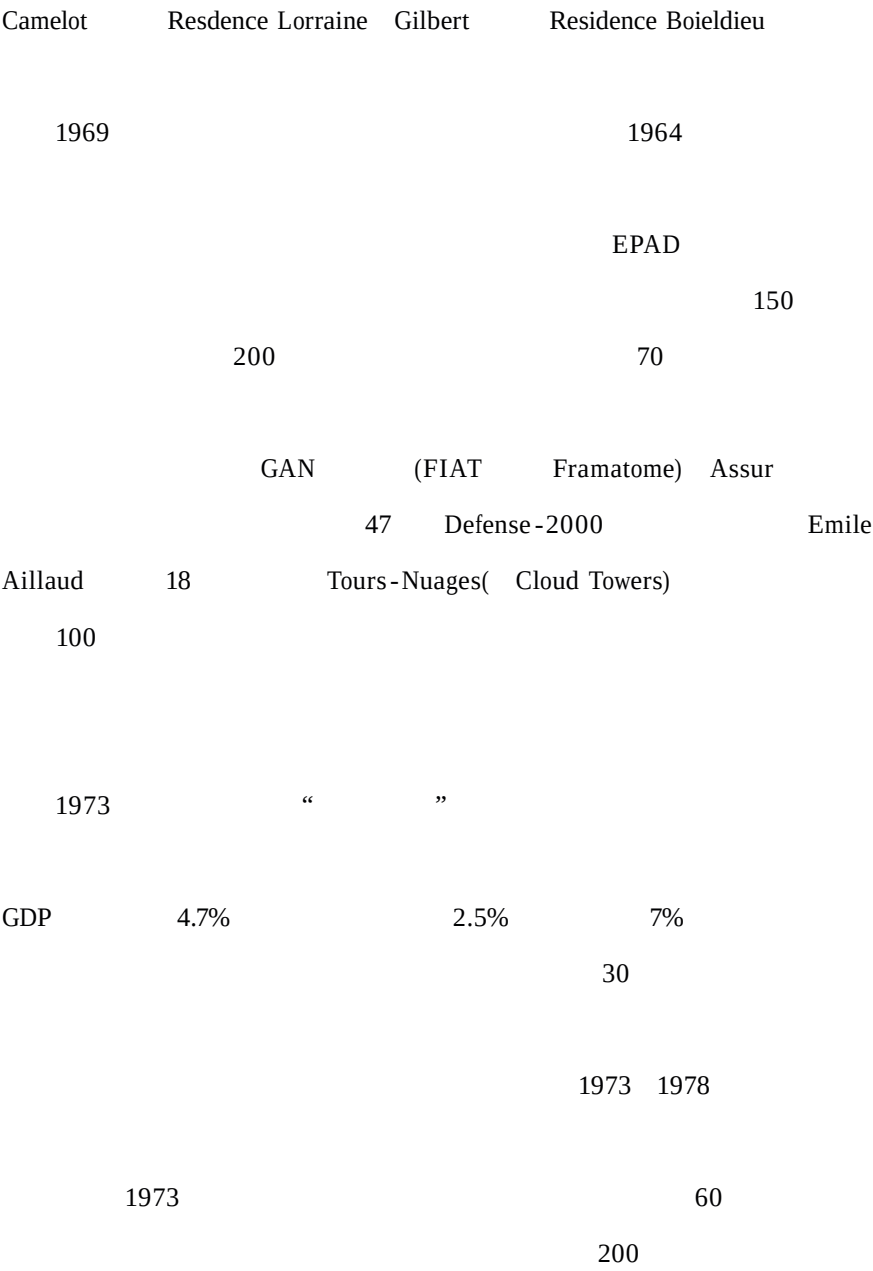
10.5

20 14

50 (Minister of

Reconstruction) Eugene Claudius Petit 1958

() Camelot De Mailly Zehrfuss



1977 18 100

<http://zh.wikipedia.org/zh-cn/%E7%AC%AC%E4%B8%80%E6%AC%A1%E7%9F>

| | |

1975 1977 EPAD

1978 10 16

• Raymond Barre

EPAD

EPAD 35

<http://www.space.com.tw/>

80

1983

IBM ELF
Technip Sari Arthur Andersen Framatome
IBM DATA CENAS

NCR 80
United Technologies
1982

1982 5.17 1990

10.4

Sofitel Novotel Ibis CNIT Informart Imax

.....

“ ” 1989 7 14

Jean-Michel-Jarre

200 1986

208

29.5

1992

“ ”

1992 4 1

80

90



4-7

| | |

2001 EPAD 1995

1995 EPAD —“ ”

“ ” “

” EPAD

Septemtrion Europlaza
Esso

EPAD ø v î Pts

| | |

10

5

35

80

1970

80

10

40

25

60

24

|

|

|

2.6

3.6

1990

1.7

1993

435

1984

1986

1990 4 18

9

1997

1991

1992 11

5

3

1993 8

174

435

2.5

1993

| | |

1996

88

19

1997

1997 10

2005

30

6

| | |

95 22.79 87

34 14

2 387 1 835 579 821

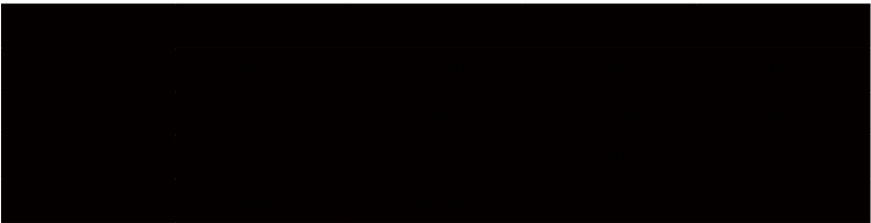
2003

.....

10 2010

30 253.18

4 - 1



2009 2009

4 - 1 74%

2012

1993 435 486

20 2010
30 360 74%

600
2009 39.29
73.76 137.24

2009 603 80%
266
40 9 405.61
7 082.15 603 194



4-8

238

165

12

60%

GDP

40%

62.3%

497

56.5%

218.7

24.9%

2009 11 16

1.7

90%

18

18

306

74

6

1.

50

“ ”

“ ”

2.

43

20

1969

| | |

3.

1997

4.

5

2

67 (167

)

2008 4

“ ” “ ” “

” “ ”

2009 11

“

”

“

”

|

|

|

10

60

1961 10

2/3

7 000



4-9

1961

1968

14.5

60

150

|

|

|



1968 6

JTC

70

50

80

1990

2 000

13

70

72

220

80

1986

| | |

10

“ ”

90

12

12

123



4 - 10

IMM

Building (Jurong Entertainment Centre, 1993–2008)

1990	IMM	5	3.5
------	-----	---	-----

250

Giant Hypermarket, Best Denki, Popular, Kopitiam, Burger

King, McDonald's, Mos Burger and Daiso (Jurong Entertainment

Centre) 1993 2008 10 1.4

2009	4	2012	4
------	---	------	---

Jcube	20.4
-------	------

1.9 IMM

	12		JTC
Corporation			Jurong Summit
2000	32	4	



4-11

IBP

1992 37 18

IBP

20 200

IBP

Sony Dell M1



4-12

“ ” 1 “ ”

21 “ ”

2000 JTC One North
JTC One North
JTC

JTC

60 99

2001 15 20
110
200

Buona Vista

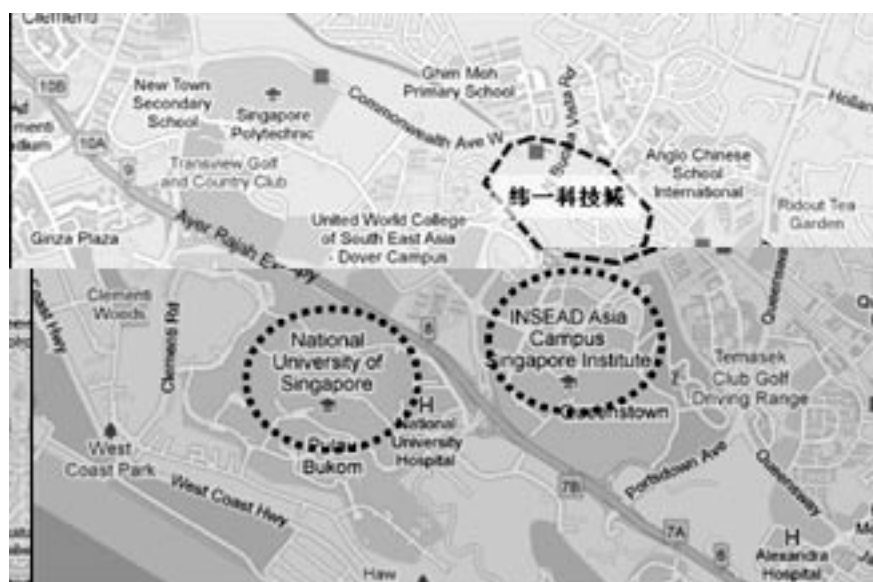
National University of Singapore (NUS)

INSEAD Asia Campus

“ ”

300

200 100



4-13

1

60

2

3

4

| | |

20 60

1996 9 , 1985

2009

2009-2015

15

-

9 Æ\$ 0

|

|

|

“

” “

”

“

”

| | |

2002

2002

200

2 300

12

60

30

4-2

	1.4
	13.2
	3.8
	1.5
	0.3
	2
	2
	3
	3.5
	30
	60.7

| | |

“ ”

100 260

200

2002

60

15

81.01

4-3

4 - 4

4-3

			9 560	5.68
			11 400	3.67
			—	—
			—	8.5
			6 381.4	7.78
			10 000	6.6
			21 200	7.73
			19 569.9	7.39
			10 153	6.22
			8 632	8.3
	TCL		15 147.2	8.34
			11 992.3	6.09
			—	—
			—	2.2
			—	2.5

4-4

	2 214	317	205	110	94	51
	67.83	9.71	6.28	3.37	2.88	1.56
	35	29	28	26	11	17
	1.07	0.89	0.86	0.8	0.34	0.52
	49	25	14	13	7	19
	1.5	0.77	0.43	0.4	0.21	0.58



4-15

10

| | |

3 000

2001

2006

“

”

25% , ñ “Hj ¾ ` j

3

“ ” “

”

“ ”

“ ”

60

90

—



4-16

500

| | |

—

“ ”

“

”

“

”

“

”

“

”

“

”

TCL





I

|

|

|

“

” “ ”

“ ”

—— .

13

Kiplinger “ ” “ ” “ 10
10 ”

| | |

“

”

.

65

72

2050

70%

2009

46.6%

70%

700

“

”

2008

“

”

“ ”

2010

86%

“ ”

“ ”

5 000

10

5 000

| | |

“ ”

—

2008

IT

2007

| | |

3 250

10 25

800

500

70%

1 000 2 000 1 000

250 500

40

2 4

5-1

2 000		1 100 1 800	
1 000 2 000		400 800	

“ ”

1.

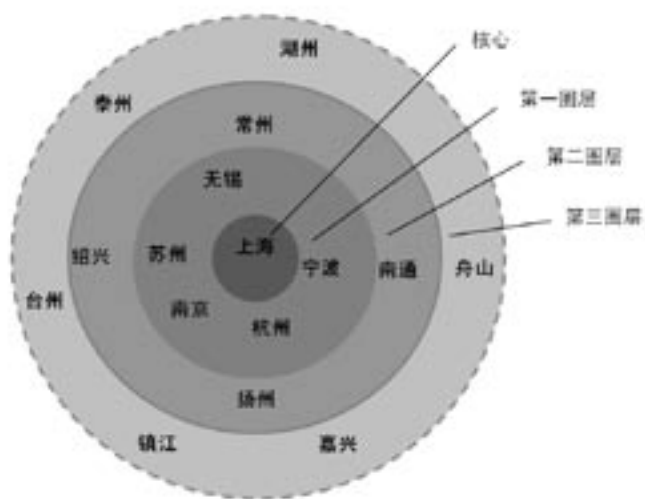
2.

|

|

|

3.



5-1

|

|

|





5-2

CBD

“ ”

“ ”

“ ”

“ ”

“ ”

| | |

4

1.

2.

3.

4.

CBD

3.7

“

”

CBD

“ ”

CBD

CBD

| | |

“ ” “

”

CBD

“ ” “ ”

I 2

| | |

“ ”

1000

“ ”

600

300 “ ”

1000

280

| | |

2007

CBD

2011 5

13.54

109

W Hotel



- [1] . [J]. 2006(5)
- [2] . CBD . 2006
- [3] . . 2009
- [4] . ——— [J].
2009(8)
- [5] . [J]. 2004(8)
- [6] . [J]. 2006
- [7] . CBD . 1992
- [8] . . 2005
- [9] . ———2005 . .2005
- [10] . . 2007
- [11] . CBD . 2009
- [12] . . 2010.4
- [13] . 43 [J]. 2003
- [14] . “ ” . 2007.2
- [15] . [D]. 2006
- [16] . [M]. 2005
- [17] . CBD [J]. 2007
- [18] JF Morrall, LL Ratnayaka, PN Seneviratne. Comparison of Central Business District Pedestrian Characteristics in Canada and Sri Lanka. Transportation Research Record, 1991
- [19] RE Murphy. The Central Business District. Longman:1972
- [20] K Nagai, Y Kondo, M Ohta. Analysis of the Rental Office Market in the Tokyo Central Business District. Japanese Economic Review, 2000
- [21] Voith R. Parking, Transit and Employment in a Central Business District. Journal of Urban Economics, Volume 44, Number 1, July 1998

