

中国的城镇化之路

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从左至右依次为：朱天教授、许斌教授、蔡江南教授、刘胜军博士
From left to right: Professors Zhu Tian, Xu Bin, John Cai and Dr Gary Liu

在大连举行的2013夏季达沃斯论坛开幕式上，李克强总理在面对全球思想领袖发言时强调，新型城镇化和扩大内需对于中国新一届领导层实现经济发展模式转型有着重要意义。

李克强总理在演讲中指出，“中国经济已到了只有转型升级才能可持续发展的关键阶段，扩大内需是最大的结构调整，促进城乡和区域间的协调发展是主要任务。”

据国家统计局数据，截至2012年底，中国的城镇化率已达到52.57%。今年8月由联合国开发计划署和中国社会科学院共同发布的《2013中国人类发展报告》预测，到2030年中国的城镇人口将增加3.1亿，达到9.76亿。

但是，中欧经济学教授朱天认为，“城镇化不是一项政策，而是一种结果；对于大多数国家而言，城镇化从来都不是政治工具，而是经济发展的自然结果。因此，随着中国继续发展，必然会带来城镇化水平的提升，因为中国目前的城镇化率依然较低。”

城镇化成为当下社会的时髦词汇，与李克强总理领导的新一届政府提振中国经济的努力密不可分。中欧国际工商学院分管科研的副教务长、经济学和金融学教授许斌却对这种现象不无担忧：城镇化作为李克强总理改革方案中的一个有机组成

部分，有易被误读的危险。“因为当我们谈论城镇化时，往往与之相连的就是政府向基础设施、房地产等领域作出投资，这种‘城镇化’遵循的是中国经济发展的旧有模式，并不是李克强总理所希望的。我认为，总理想要的是一种新型的、以人为本的城镇化模式。”

全世界都在屏息凝视中国这样一个特色鲜明的泱泱大国如何去完成这一艰巨任务，又能为其他国家带来哪些启示。“如果城镇化本身可以成为一种政治举措，那么经济发展岂不易如反掌？那么一来，世界上就不会有穷国——只要把所有人都变成城里人就好了。就拿中国来说，只要废除户口系统，那么一切便可水到渠成吗？”朱天教授话锋一转，“大多数国家并没有户口制度，但它们中很多国家依然停留在不发达状态，而有着户口制度的中国却保持了全世界最快的发展速度。”

朱天教授强调，中国城镇化绝不仅仅是让人们从农村移居城镇，而是涉及广泛而复杂的政策领域，包括户口、医疗、房地产、土地所有权、地方政府债务、金融系统和服务业，这些都是目前的热议话题。因此，中国新领导层如何在这些乃至更广阔的领域中进行决策，会给经济发展带来何种影响，将决定中国城镇化的未来发展道路。

The Road to an Urban China

By Janine Coughlin

When he addressed global thought leaders gathered at the opening ceremony of the Summer Davos Forum in Dalian, Premier Li Keqiang highlighted just how important urbanization and domestic demand are to the new leadership's plans for transforming China's economic development model.

"In readjusting the structure, the most important aspect is to expand domestic demand, and a major task is to pursue a balanced development between urban and rural areas and among different regions," he said in his September speech.

China's urbanization rate reached 52.57% by the end of 2012, according to figures released by the National Bureau of Statistics. China's 2013 National Human Development Report, released in August by the United Nations Development Programme (UNDP) and the Chinese Academy of Social Sciences (CASS), forecasts that by 2030 the country's urban population will grow by an additional 310 million to reach 976 million people.

However, as CEIBS Professor of Economics Zhu Tian explains, "Urbanization is really an outcome, rather than a policy. For most countries, urbanization is never really a policy tool, but just an outcome of economic development. So in that sense, as China develops further, of course there will be more urbanization as a result, because China's urbanization rate is still low."

Urbanization has been a buzzword closely linked to the new government's drive, led by Premier Li, to shore up the Chinese economy. CEIBS Associate Dean (Research) and Professor of Economics and Finance Xu Bin cautions that urbanization, which he sees as an integral part of Premier Li Keqiang's reform agenda, can be easily misunderstood. "This is because when we talk about urbanization, it's usually associated with government investment in infrastructure, real estate, and so on. This kind of 'old style' urbanization is actually following the old model of economic growth in China. That's not what is in the mind of Li Keqiang. I think

he is thinking about a new type of urbanization, a people-centred one."

China, with its unique characteristics, is being closely observed to see how it will pull off this mammoth task and what lessons it could potentially provide for other countries. "If somehow urbanization itself could be a policy measure, then economic development itself would be *so* easy. There would be no poor countries at all; we could just make everybody an urban resident. That would be really simple. Or in China you might think, okay, just abolish the hukou [household registration] system, then everything would be perfect," says Prof Zhu. "Most countries don't have a hukou system, but many of them are still underdeveloped. China has a hukou system, but also has the fastest growth rate in the world."

He stresses that urbanization in China is not simply about moving people from the countryside into the city. It involves reforms in a variety of complex policy areas that have lately been under discussion, including the household registration system, healthcare, real estate, land rights, local government debt, the financial system and the service sector. The contours of China's urbanization will therefore be shaped by how the country's new leaders handle policies in these and other areas, coupled with the impact from economic development.

"If you want to promote urbanization, I think hukou is the first thing you need to touch. But we cannot expect the hukou system to be abandoned overnight because it's a very complicated problem," says Dr Gary Liu, Executive Deputy Director of the CEIBS Lujiuzui Institute of International Finance (CLIIF). "In the long run, we must reduce the importance of the hukou, but it must be done gradually."

A Chinese citizen's hukou determines where he can access social benefits such as healthcare and where his child can go to school. Rural residents who have migrated to urban areas for jobs must return to their hometowns for government-subsidized medical care, and their children

中欧国际工商学院陆家嘴国际金融研究院执行副院长刘胜军博士认为,“要推进城镇化,首先要着手解决户口问题,但户口不是一朝一夕就能废除的。从长远来说,必须设法减小户口的重要性,但是这得慢慢来。”

一个中国公民的户口决定了他能在哪里享受医保等社会福利,他的孩子能在哪里上学。来到城市打工的农民必须回到原籍,才能得到政府补助的医疗保险;他们通常必须缴纳一笔远超其经济能力的天价费用,才能让孩子在城市里上学。

中欧医疗管理与政策研究中心主任蔡江南教授认为,户口限制了廉价医疗服务的可及性,此外,目前中国医疗系统最大的问题就是医生和诊所太少,而条条框框太多。

“我确实看到,政府愿意为私人资本和社会资本敞开大门,让他们来建造更多的医院,但我们需要更多称职的医生,否则医院不过是一幢建筑罢了。”蔡教授说,“目前中国医生收入不高,执业受到诸多限制。政府不允许他们开设私人诊所,这就是问题

所在。随着新一轮城镇化的进行,这一问题会变得更为严重。”

蔡教授认为,在向大量病人提供简单医疗服务和慢性病治疗方面,诊所比医院更有效率。他还指出,由于政府掌控了市场准入资格、规划和社会保障,私人资本和社会资本进入医疗卫生领域事实上很有难度。

“城镇化面临着许多难题和挑战——教育、住房、基础设施、医疗等等,政府必须打破或废除那些阻挡私人资本进入的壁垒,并鼓励私人资本在这些重要领域有所作为。”刘胜军博士说,“另外,政府必须改变经济管理方式,确保法治和透明机制,这样才能降低交易成本。”

许斌教授认为,新一轮改革在很多方面都力图建立一个更加市场化的经济体系,降低私人资本的投资门槛。“减少政府职能,发挥市场作用,这是新一轮改革的总体方向。”他说,“这样一来,小公司和创业者拓宽了融资渠道,将为中国带来新的增长动力。”





cannot attend school in the city unless they pay a hefty fee that is usually far beyond their financial resources.

Besides the hukou's regulation of access to affordable healthcare services, Director of the CEIBS Centre for Healthcare Management and Policy Prof John Cai says that the biggest bottlenecks in the healthcare system today are a lack of physicians and clinics, and too much regulation.

"I do see that the government wants to open the door to private and social capital to build more hospitals. But in my opinion a hospital is just a building, you need more good physicians," he says. "Chinese physicians today are not well paid and they have a lot of restrictions regarding employment. They have closed the door to physicians to be able to open up their own private clinics. So that's the bottleneck. It will become a bigger problem under the new urbanization."

Prof Cai says that clinics can be more efficient than hospitals at providing a large patient population with simple medical services and treatment for many types of chronic illnesses. He also explains that because the government controls access to market entry, planning, and social

insurance, it is challenging for private and social capital to enter the sector.

"For urbanization, there are many bottlenecks and many important challenges – the education system, housing system, infrastructure, medicare and many others," says Dr Liu. "What the government needs to do is to break or cancel the barriers to entry for private capital. You need to encourage [private capital] in these important areas. Secondly, the government needs to change the way the economy is managed. The government should ensure we have rule of law and a transparent system, and then transaction costs will be lowered."

Prof Xu says it is his understanding that some aspects of the upcoming round of reforms will aim to create a more market-oriented economic system and reduce the barriers to private capital investment. "Reducing the role of the government and expanding the role of the market, that's the overall direction of the new round of reform," he says. "This will really make funds more available to small companies, to start-up entrepreneurs. And this will become a new engine of growth for China."



中国经济已到了只有转型升级才能持续发展的关键阶段，扩大内需是最大的结构调整，促进城乡和区域间的协调发展是主要任务。”



李克强总理表示，发展服务业是中央领导层的另一个工作重点。许斌教授认为，服务业有两个不同的方面：一个是传统的劳动密集型行业，如餐饮业；另一个被称为“现代服务业”，包括金融服务（如个人汽车消费贷款）——后者能够帮助拉动内需，因此是中国新一届领导层经济转型计划中的重要一环。然而，在目前以国有银行为主导的中国金融领域，改革尚未取得长足进展。

“我的看法是，随着中国制造业发展速度放缓，传统服务业便承担起了吸收劳动力，提供就业机会的重任，但它的功用还不止于此，它还是中国未来转型成为真正的高收入国家的关键所在。”许斌教授说，“中国正在力图避免所谓的‘中等收入陷阱’，其中一项举措就是推动服务业发展，而很多服务业确实是由创业者发起的，它们意味着创新。”

虽然推动城镇化、扩大内需和促进GDP增长不能靠某项政策来实现，但是随着国家城镇化水平的提升，其他领域也会相应发展起来。“经济更为城镇化，人均GDP必然会同步增长，因为城镇生产力远高于农村生产力。”许斌教授解释道，“因此，城镇化将有助于我国提升生产力水平，意味着增加人民收入，最终消费水平也会随之提高——但记住这是人民生产力和收入提高的结果，而非原因。”

朱天教授认为，城镇化水平大体上是与经济发展携手共进的，为了实现可持续发展，政府应该在短期内维持宏观经济稳定，并确保经济长期增长态势。除此之外，提高效率（尤其是提高投资效率）、进行金融市场改革、重建社会保障体系、缩小收入差距、注重环境保护等问题都至关重要。而收入分配和环境保护需要格外重视，“因为经济发展自身不会带来这两方面的进步。”



Developing China's service sector is another area Premier Li has said the new leadership is working towards. Prof Xu explains that there are two distinct aspects to the service sector – one comprises traditional, labour intensive jobs, such as restaurant workers. The other is what he termed “modern service” which includes financial services, such as consumer car loans, that can also help another plank in the new leadership's economic transformation plans – boosting domestic consumption. But China's reforms to the financial sector, which is currently dominated by state-owned banks, have not yet been robust.

“I think the service economy is not only a solution to employment, since China's manufacturing sector is slowing down and the traditional service economy can be another place to absorb the labour force, but also because it is at the core of China's transition towards a real high-income country in the future,” Prof Xu says. “China is trying to avoid the so-called middle-income trap. One way to do it is to drive up the service sector, which is also associated with innovation, since a lot of service is actually driven by entrepreneurs.”

Though there is no one single policy that can promote urbanization, boost consumption, and increase GDP

growth, as the country becomes more urbanized, it will naturally help promote development of other areas, explains Prof Zhu. “As the economy becomes more urbanized then of course the per capita GDP will increase at the same time because productivity in urban sectors is much higher than in rural sectors,” he says. “So urbanization will help to increase the country's level of productivity, which means people's incomes will increase as well. Consequently, people's consumption level will increase – but that's the result of an increase in people's productivity and income, not the other way around.”

Prof Zhu suggests that fundamentally urbanization goes hand in hand with economic development, and to achieve sustained development, the government needs to maintain macroeconomic stability in the short run, and to maintain economic growth in the long run. Beyond that, he said, increasing efficiency – particularly investment efficiency and financial market reforms, rebuilding the country's social welfare system, improving income equality, and addressing environmental issues, are all important. The distributional and environmental issues are of particular concern, as change in these areas, “will not come naturally as a result of economic development,” he says.