

2022 年度报告  
THE ANNUAL REPORT 2022

# 动荡与重构

TURMOIL AND REALIGNMENT

“一带一路”倡议下的**全球城市**

GLOBAL CITIES IN THE VISION OF THE BELT AND ROAD INITIATIVE



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# 前言 PREFACE

2022年，新冠肺炎疫情持续肆虐，俄乌冲突波及全球，能源危机愈演愈烈，全球化危机一波未平，一波又起。多重冲击下，全球交通联系动荡，产业链供应链破碎化，各国政府纷纷加大本土投资保障发展安全与韧性，全球城市陷入动荡之中，面临着不确定的挑战与机遇。

在全球治理阵营对立风险日益增长、贸易壁垒不断推高的背景下，“一带一路”倡议倡导的包容性全球化理念是全球化“寒潮”中的一股暖流，为全球化注入新的动力。包容性全球化坚持更公平的发展理念，推动新兴经济体城市通过多样路径嵌入全球城市网络，催生多元共生的“全球城市雨林”。

今年，我们持续优化完善全球活力城市、“一带一路”潜力城市指标体系及算法，与时俱进结合产业方向变革、科技竞争加剧趋势，对全球城市复苏的特征作出新观察。我们完善了数据来源和技术分析方法，以数字化方式直观呈现、深入探讨全球创新、生产与服务、联通设施网络特征与趋势。

百年变局和世纪疫情相互交织影响下，今年全球城市复苏态势冷暖有别，美洲提升、欧洲下降、东亚持平，全球城市格局正在发生重大调整。随着全球产业链供应链多元化、近岸化重构，新一轮科技革命和产业变革加速演进，全球城市秩序重构的趋势初露端倪。

In 2022, COVID-19 continues to rage. Meanwhile, the Russia-Ukraine conflict has led to consequences worldwide, with intensifying energy crisis and globalization crisis coming in waves. The external shocks have resulted in disruptions of global transportation connectivity and fragmentation in supply chains. Governments around the world are increasing their domestic investments to safeguard development security and resilience. Faced with uncertain challenges and opportunities, global cities are going through turmoil.

Against the backdrop of growing risks from the confrontation of opposing camps in global governance and the rising trade barriers, the concept of inclusive globalization advocated by the Belt and Road Initiative is a warm current amid the cold wave of globalization, injecting new momentum into globalization process. Inclusive globalization advocates more equitable development, with the aim to facilitate emerging countries to embed themselves into the network of global cities through various paths and create a diverse and symbiotic rainforest of global cities.

This year, we have continued to optimize and improve the index system and algorithm of global dynamic cities and Belt and Road potential cities, with new observation on the features of global cities recovery and consideration of the trend of industrial evolution and intensified technological competition. We have improved the data sources and technical analysis methods to digitize and delve into the features and trends of global innovation network, production and service network, and connectivity facility network.

Under the influence of profound changes unseen in a century intertwined with the once-in-a-century pandemic, the recovery of global cities remains uneven, with growth in the Americas, recession in Europe and stagnation in East Asia, leading to significant adjustments to the landscape of global cities. With the diversification and nearshoring of global supply chains, a new wave of technological revolution and industrial evolution is picking up speed, thus giving shape to the reshuffling of global cities order.

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# 全球城市的动荡与重构

## TURMOIL AND REALIGNMENT OF GLOBAL CITIES

### 1.1 全球化危机一波未平，一波又起 CRISIS OF GLOBALIZATION COMING IN WAVES

新冠肺炎病毒变异不断、持续肆虐。联合国数据显示超过 90% 的确诊病例来自城市地区，人口集中的城市是新冠肺炎疫情的震中。猴痘病毒汹汹来袭，世界卫生组织再度发布“全球最高级别公共卫生警报”，全球城市公共卫生安全面临不断的威胁与挑战。

俄乌冲突对全球能源、粮食、矿产供应链的冲击不断显现，国际货币基金组织 (IMF) 预测 2022 年全球经济增速显著放缓，美国和欧洲部分经济体的通胀已达 40 年来的最高水平。地缘政治紧张、极端天气频发、全球经济风险等纷繁复杂的挑战相互交织，进一步加剧了全球城市复苏的不确定性。

COVID-19 mutations and variants continue to wreak havoc. According to the UN, urban areas with high population density are epicenters of the COVID-19 pandemic, accounting for more than 90% of reported cases. With the onslaught of monkeypox, the WHO issued the highest level of alert for Public Health Emergency of International Concern. Public health and safety in global cities are under constant threat and challenge.

The impact of Russia-Ukraine conflict on the global supply chains of energy, food and minerals continues to emerge. The IMF projected slower global economic recovery in 2022. Inflation in the US and some European economies has hit the highest level in 40 years. Geopolitical tensions, frequent extreme weather events, global economic risks and other complex challenges are intertwined, further exacerbating the uncertainty in the recovery of global cities.

### 1.2 全球城市动荡变革与秩序重构 TRANSFORMATION AMID TURMOIL AND REALIGNMENT OF ORDER

全球交通联系动荡。新冠肺炎疫情下各国管制措施松紧有别，全球航空客运尚未完全恢复。地缘冲突不断升级导致国际陆路交通受阻、关键海上通道中断，全球货运动荡起伏进一步加剧。此外，“北溪”天然气管道受损、海底光缆故障等重大国际事件，也接连对全球城市物流、信息流网络带来扰动。

全球产业链供应链重塑。频频爆发的“黑天鹅”事件加速了全球供应链重塑的步伐，主要国家地区出于安全考虑推动产业链供应链多元化、近岸

Global transportation connectivity is disrupted. During the pandemic, different countries have introduced varying restrictions and the global air passenger traffic has not yet fully recovered. Escalating geopolitical conflicts have led to disruptions in international land transportation as well as important sea lanes. Besides, major international events, such as the Nord Stream gas pipeline damage and submarine cable failures, have also disturbed the networks of global urban logistics and information flow.

Global supply chains are being reshaped. The frequent outbreak of black swan events has accelerated the realignment pace of global supply chain. Major countries and regions are seeking to diversify, nearshore and friend-shore their supply chains for security reasons to reduce the dependence

化、“友岸化”布局，降低半导体、新能源电池、关键矿物和医药用品等关键领域对外国单一供应商的依赖，全球城市产业格局正在发生深刻变革。

技术和创新竞争日趋剧烈。在第四次工业革命浪潮背景下，产业数字化绿色化转型步伐加快，创新成为重塑全球和区域竞争格局的关键变量。各国政府纷纷重新调整科技重点领域布局，加大本土尖端技术研究和科技创新投资，全球城市创新格局正在进入快速调整变化的时期。

in key areas such as semiconductors, new energy batteries, key minerals and medical supplies on a single foreign supplier. As a result, the industrial landscape of global cities is undergoing profound changes.

Technology race and innovation competition are growing. In the context of the fourth industrial revolution, the pace of digitalization and green transformation of industries has accelerated, and innovation has become a key variable in reshaping the global and regional competitive landscape. Governments have readjusted their priority areas of science and technology, and increased investment in homegrown cutting-edge technology research and scientific innovation. The innovation landscape of global cities is entering a period of rapid readjustments.

# 全球活力城市

## GLOBAL DYNAMIC CITIES

### 2.1 总体格局：全球城市复苏冷暖有别 GENERAL LANDSCAPE: UNEVEN RECOVERY OF GLOBAL CITIES

今年，东京、上海、北京继续稳居全球前三位，但在全球范围内，各区域城市的复苏势头强弱不均，排名总体呈现美洲提升、欧洲下降、东亚持平的差异化特征。

在美洲板块，由于创新能力进一步增强、国际客运航班快速恢复，芝加哥、亚特兰大等城市排名提升，其中亚特兰大凭借繁忙的全球航班联系首次进入全球前 20 位。波哥大、圣地亚哥等南美首都城市积极嵌入全球生产与服务网络，发展活力提升。在欧洲板块，受一系列国际事件的影响，伦敦、巴黎、鹿特丹等交通枢纽型城市受到较大

This year, Tokyo, Shanghai and Beijing continue to maintain their top 3 positions globally, but the recovery of global cities remains uneven. The cities in the Americas rise in the rankings, whereas European cities fall and East Asian cities hold the line.

For the Americas, Chicago and Atlanta witness improved rankings due to further strengthened innovation and rapid recovery of international passenger flights, with Atlanta entering the global top 20 for the first time with its busy global flight routes. Capital cities in South America including Bogota and Santiago are actively seeking to embed themselves into the global production and service network and thus are gaining momentum in development. In Europe, transport hubs such as London, Paris and Rotterdam have been hit harder by a series of international events. In East Asia, Tokyo, Shanghai and Beijing continue to rank high,

冲击。在东亚板块，东京、上海、北京等城市持续位居前列，整体表现较为稳定，深圳凭借创新及先进制造优势稳中有进。

我们发现，全球领先的活力城市呈现区域性集聚的特征，由一个或多个极点城市联动区域形成全球活力城市聚落<sup>1</sup>，它们在全球城市发展中扮演着引领性角色。东亚地区引领世界级活力城市聚落，中国、日本3大城市聚落进入全球前5。多极组合型城市聚落如粤港澳大湾区、欧洲北部城市群、达拉斯-休斯敦等，将成为未来城市群协同发展与潜力释放的新形态。跨境型城市聚落如温哥华-西雅图、欧洲北部城市群、粤港澳大湾区等，将成为未来跨制度、跨文化协作的重要载体。

with stable overall performance. Shenzhen makes steady progress by building upon its advantages in innovation and advanced manufacturing.

We find that the leading global dynamic cities are characterized by regional clustering. That is, one or several core cities are driving the growth of the entire region to generate a cluster of global dynamic cities, which plays a leading role in the development of global cities. East Asia is leading the world in the development of global dynamic city clusters<sup>1</sup>, with three major city clusters in China and Japan entering the global top 5. The city clusters with several core cities, such as Guangdong-Hong Kong-Macao Greater Bay Area, Northern European city cluster and Dallas-Houston cluster, will become the new paradigm of future city clusters to coordinate development and unleash potential. Cross-border city clusters such as Vancouver-Seattle cluster, Northern European city cluster and Guangdong-Hong Kong-Macao Greater Bay Area, will become the major platforms for collaboration across, institutions and cultures.

### GLOBAL INNOVATION NETWORK: POLARITY AND UBIQUITY

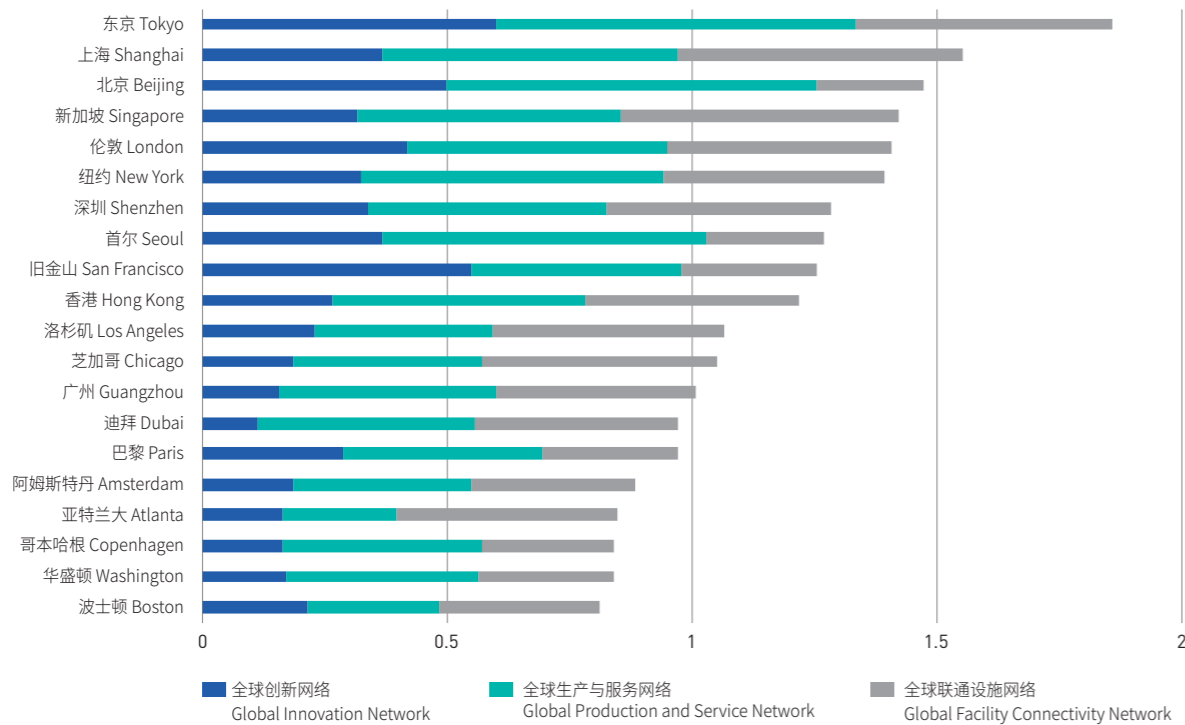


图 2-1 全球活力城市指数排名及得分（前 20 位）  
Figure 2-1 RANK AND SCORE OF GLOBAL DYNAMIC CITIES INDEX (TOP 20)

1 基于全球活力城市地理分布与全球活力城市指数，融合 DBSCAN 算法与 3I 模型，识别全球活力城市的聚落体系。 Based on the geographical distribution of global dynamic cities and Global Dynamic Cities Index, DBSCAN algorithm and 3I model are integrated to identify the cluster system of global dynamic cities.

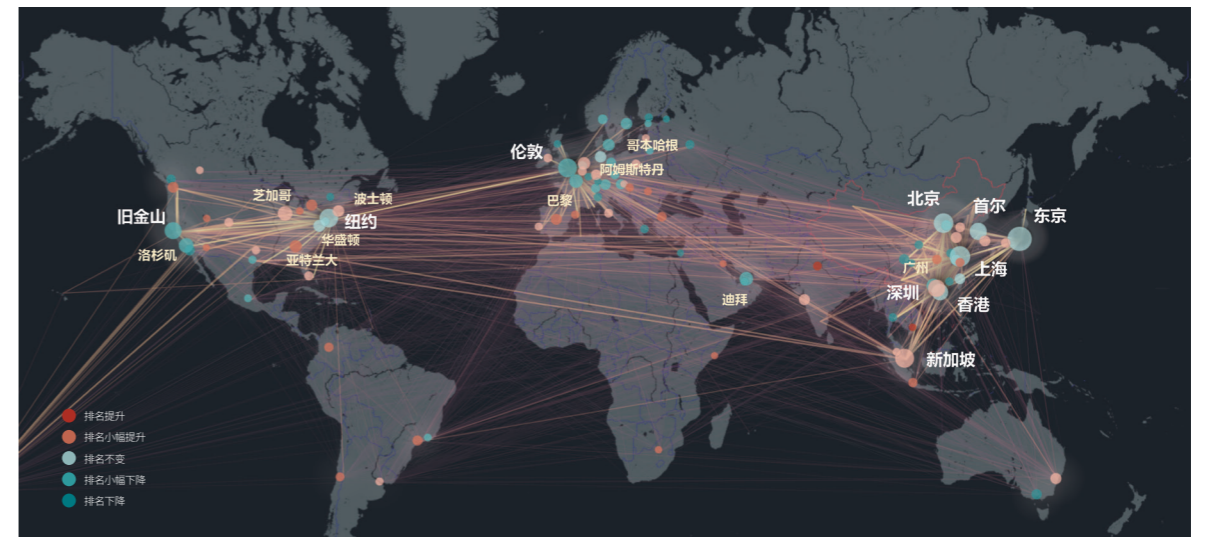


图 2-2 全球活力城市排名变化情况 Figure 2-2 CHANGE IN THE RANKINGS OF GLOBAL DYNAMIC CITIES



图 2-3 全球活力城市聚落分布 Figure 2-3 DISTRIBUTION OF GLOBAL DYNAMIC CITY CLUSTERS

## 2.2 全球创新网络：创新极化与泛在并存<sup>2</sup> OF INNOVATION<sup>2</sup>

全球创新城市格局高度极化，东京、旧金山、北京、伦敦、圣迭戈、剑桥等极少数城市在全球创新网络中占据主导地位，是全球创新“塔尖”。此外，创新优势城市在日本东京湾、旧金山湾区、

The landscape of global innovation cities is highly polarized. A very few cities such as Tokyo, San Francisco, Beijing, London, San Diego, and Cambridge dominate the global innovation network as the pinnacles of global innovation. In addition, cities with advantages in innovation are concentrated in Tokyo Bay of Japan, San Francisco Bay Area,

2 智慧芽创新中心作为全球“技术前沿”网络部分研究支持方。 Patsnap Innovation Research Center is a research partner, providing support for the section on Global Technology Frontier Network.

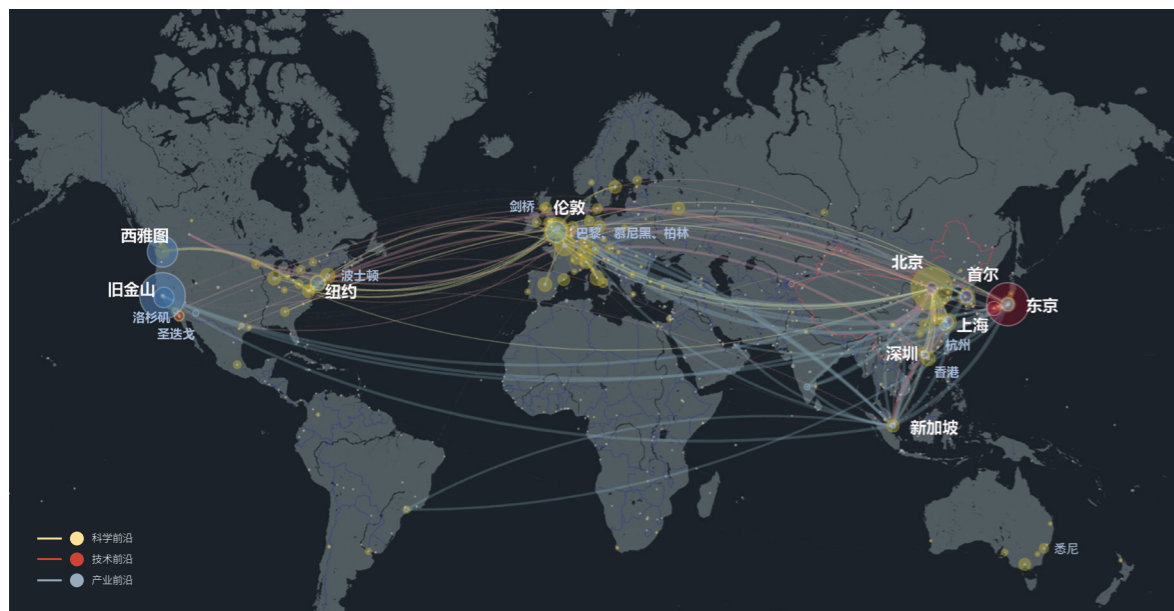


图 2-4 全球创新城市网络格局 Figure 2-4 LANDSCAPE OF GLOBAL INNOVATION NETWORK

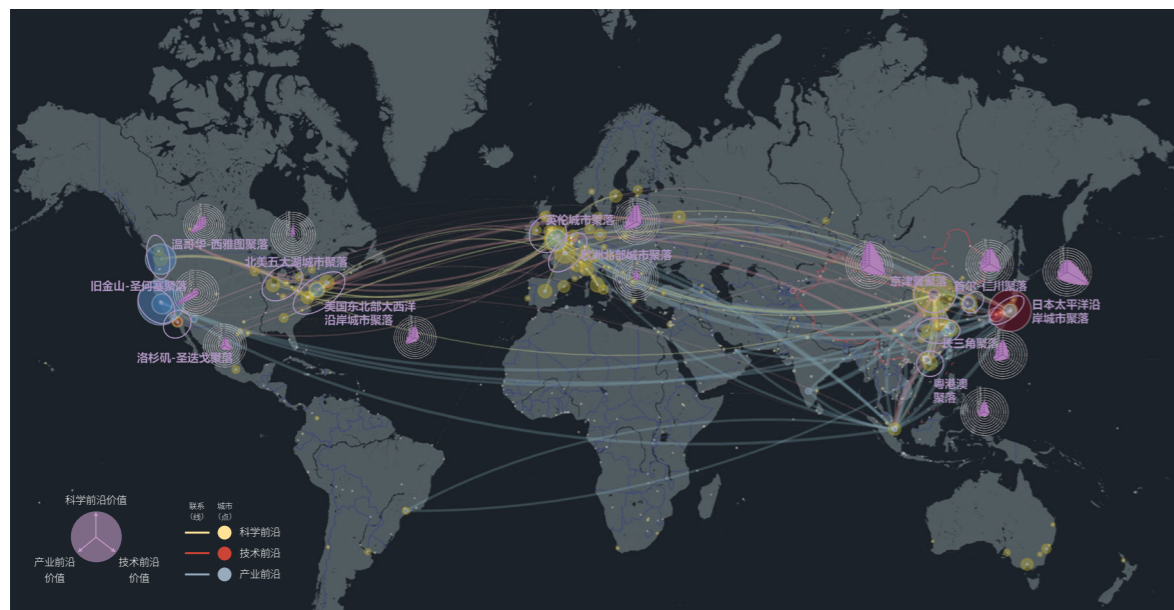


图 2-5 全球创新城市聚落分布 Figure 2-5 DISTRIBUTION OF GLOBAL INNOVATION CITY CLUSTERS

美国东北部、粤港澳大湾区、京津冀、欧洲北部及英伦地区集聚形成全球创新聚落，成为推动全球创新发展的重要载体。

随着全球科技创新进入多点突破、群体迸发的新阶段，新德里、吉隆坡等部分新兴市场和发展中

northeastern United States, Guangdong-Hong Kong-Macao Greater Bay Area, Beijing-Tianjin-Hebei, Northern Europe and the UK to form global innovation clusters, serving as the important venues for the development of global innovation.

As breakthroughs are achieved in various areas of innovation in science and technology by multiple players worldwide, cities in emerging

经济体城市也凭借产业化和市场化优势，成为全球创新网络中的新力量，推动全球创新资源要素向更广阔的区域扩散，呈现创新极化与泛在并存的图景。

“技术脱钩”背景下，伦敦、剑桥等欧美基础科研型城市排名显著上升，而杭州、台北等由于基础研发能力相对不足，今年排名有所下降，处于科技博弈动荡的前沿。

### 全球创新前沿网络特别观察

当前，全球进入到以人工智能和物联网等为标志的第六波创新浪潮，各国围绕科学技术的竞争空前激烈，前沿科技领域在改变国家力量对比方面的决定性作用愈加凸显。今年，我们结合国内外趋势与政策导向，识别了人工智能、脑科学、量子信息等九大科学前沿，新材料、新能源汽车等七大技术前沿<sup>3</sup>及以独角兽、代表性科技创新企业为代表的产业前沿作为特别观察领域，探讨全球城市在科学前沿、技术前沿、产业前沿三个创新环节的表现。

### 科学创新前沿：欧美城市引领全球理论创新，亚洲城市快速崛起

科学前沿以高校、科研院所等力量为主体，通过基础研究产出原创性、颠覆性的核心技术或理念。该环节以北京、伦敦、剑桥为核心，尽管以北京为代表的亚洲城市快速崛起，欧美城市仍然占据全球科学研究的主导地位。科学前沿网络方面，欧洲内部、欧洲与美国东部城市的联系相对密切，中国城市内部合作紧密但国际合作相对不足。

markets and developing countries, such as New Delhi and Kuala Lumpur, have become new players in the global innovation network thanks to their advantages in industries and markets. They are spreading global innovation resources and factors across a broader range of places. As a result, the landscape of global innovation features both polarity and ubiquity.

In the context of technological decoupling, the rankings of research-driven cities in Europe and the United States, including London and Cambridge, have risen significantly, while Hangzhou and Taipei, which bear the brunt of the technology rivalry, fall this year due to relatively weak R&D capabilities.

### New Observation on Global Innovation Frontier Network

At present, the world is ushering in the sixth wave of innovation marked by artificial intelligence and the Internet of Things. The competition among countries around science and technology is more intense than ever. The frontier science and technology are playing an increasingly prominent role in changing the dynamics of national powers. This year, based on our observation on the trends and guiding policies home and abroad, we have identified nine science frontiers such as artificial intelligence, brain science and quantum information, seven technology frontiers<sup>3</sup> such as new materials and new energy vehicles and several industry frontiers such as unicorns and representative innovation enterprises. We pay special attention to the performance of global cities in terms of innovation in science, technology and industry frontiers.

### Scientific Innovation Frontier: European and American cities are leading global theoretical innovation and Asian cities are rapidly on the rise

Universities and research institutes are the mainstay of the science frontier, who produce original and disruptive core technologies or ideas through basic research. The core players in this area include Beijing, London and Cambridge. Despite the rapid rise of Asian cities such as Beijing, European and American cities remain dominant in global research activities. As for the science frontier network, the connections within Europe and between Europe and eastern US cities are relatively close, while Chinese cities have strong internal ties but insufficient international cooperation.

<sup>3</sup> 九大科学前沿领域分别为人工智能、脑科学、量子信息、半导体、医学健康、生物技术、新材料、新能源、太空；七大技术前沿领域分别为人工智能、通信、半导体、新材料、生物医药、新能源汽车、新能源。 The nine science frontiers are artificial intelligence, brain science, quantum information, semiconductors, healthcare, biotechnology, new materials, new energy, and space. The seven technology frontiers are artificial intelligence, communications, semiconductors, new materials, biomedicine, new energy vehicles, and new energy.

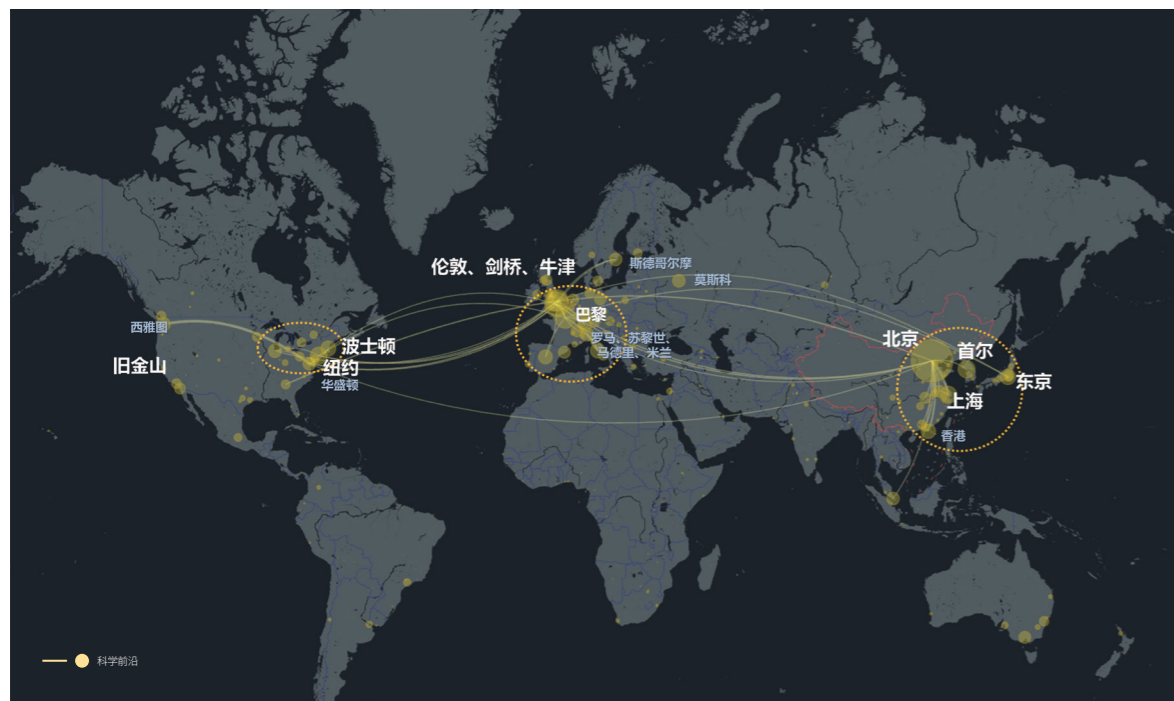


图 2-6 全球科学创新前沿网络格局 Figure 2-6 LANDSCAPE OF GLOBAL SCIENTIFIC INNOVATION FRONTIER NETWORK

表 2-1 科学创新前沿 TOP20 城市 Table 2-1 TOP 20 CITES IN SCIENTIFIC INNOVATION FRONTIER

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	北京 Beijing	伦敦 London	剑桥 Cambridge	巴黎 Paris	首尔 Seoul	上海 Shanghai	纽约 New York	牛津 Oxford	东京 Tokyo	波士顿 Boston	罗马 Rome	香港 Hong Kong	苏黎世 Zurich	马德里 Madrid	西雅图 Seattle	米兰 Milan	芝加哥 Chicago	莫斯科 Moscow	华盛顿 Washington	斯德哥尔摩 Stockholm

**技术创新前沿：以东京领衔的东亚城市创新活跃**  
技术前沿多以研发机构、实验室等力量为主体，主要表现为以专利产出等为载体的技术创新。当前全球处于技术爆发阶段，东亚城市在 PCT 专利申请和授权方面展现出特别优势，日本有 5 座城市进入全球前 20 位，占据全球技术创新高地，首尔、北京、深圳、上海、新加坡等城市持续强化技术沉淀，均进入第一梯队。

**Technological Innovation Frontier: East Asian Cities led by Tokyo are vibrant in innovation**  
R&D institutes and laboratories are the mainstay of the technology frontier, whose technological innovations are mainly in the form of patent. Currently, the world is on the cusp of technology explosion. East Asian cities have advantages in PCT patent application and licensing. Five Japanese cities have entered the global top 20, representing the strongholds for global technological innovation. Due to continuous improvement in technological capabilities, Seoul, Beijing, Shenzhen, Shanghai and Singapore become the top-tier cities in the area.

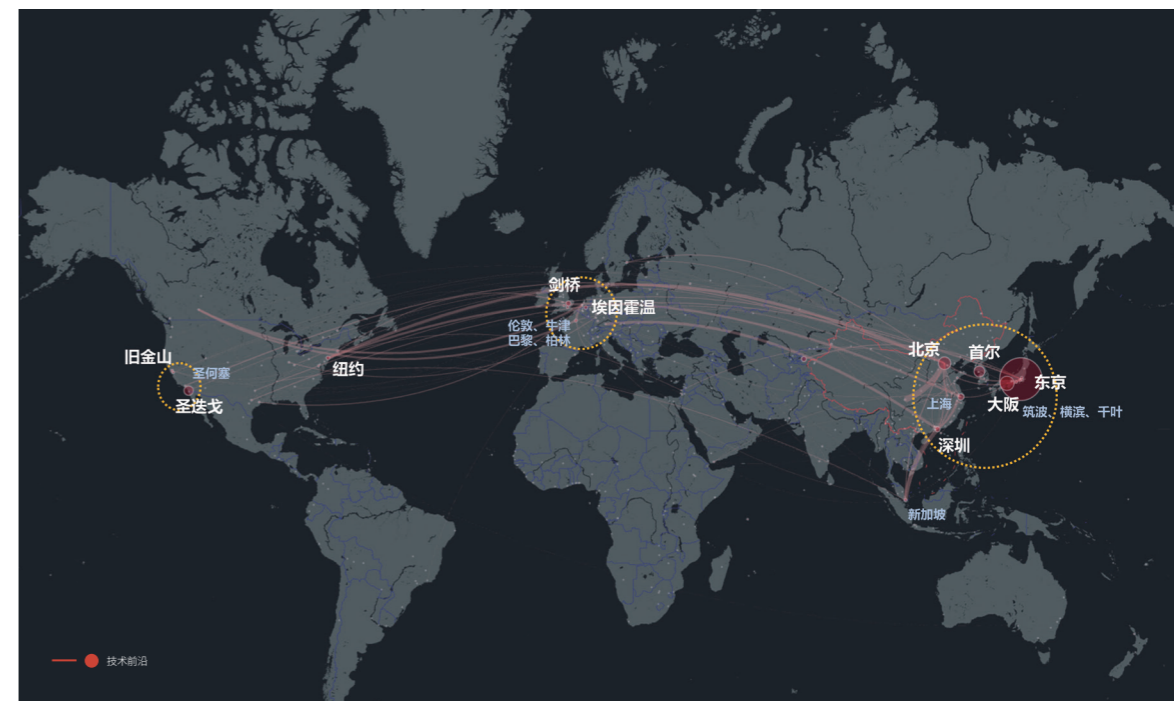


图 2-7 全球技术创新前沿城市网络 Figure 2-7 GLOBAL TECHNOLOGICAL INNOVATION FRONTIER NETWORK

表 2-2 技术创新前沿 TOP20 城市 Table 2-2 TOP 20 CITES IN TECHNOLOGICAL INNOVATION FRONTIER

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	东京 Tokyo	大阪 Osaka	圣迭戈 San Diego	剑桥 Cambridge	首尔 Seoul	北京 Beijing	埃因霍温 Eindhoven	深圳 Shenzhen	纽约 New York	旧金山 San Francisco	伦敦 London	筑波 Tsukuba	横滨 Yokohama	千叶 Chiba	圣何塞 San Jose	巴黎 Paris	上海 Shanghai	牛津 Oxford	柏林 Berlin	新加坡 Singapore

**产业创新前沿：旧金山引领全球产业创新，新兴经济体城市涌现**  
产业前沿主要以全球代表性科技创新企业、独角兽企业为主导，进行技术开发与产业发展。该环节以旧金山、西雅图、伦敦为核心。由于拥有大量的数据、大规模的计算和应用场景，中美产业创新活力充足，其中，美国在前五位城市中占据四城，中国城市上海、北京、杭州、深圳位列 8-11。此外，新兴经济体城市正在崛起。例如，

**Industrial Innovation Frontier: San Francisco is leading global industrial innovation and cities of emerging economies are on the rise**  
The industrial frontier is led by innovative technology companies and unicorns who promote the development of technology and industry. San Francisco, Seattle and London are the core players in this area. With a large amount of data and use cases for computing and application scenarios, Chinese and American cities are vibrant in industrial innovation. Four of the top five spots belong to the cities in the US, while Shanghai, Beijing, Hangzhou and Shenzhen are ranked 8th to 11th. In addition, cities of emerging economies are on the rise. For instance,

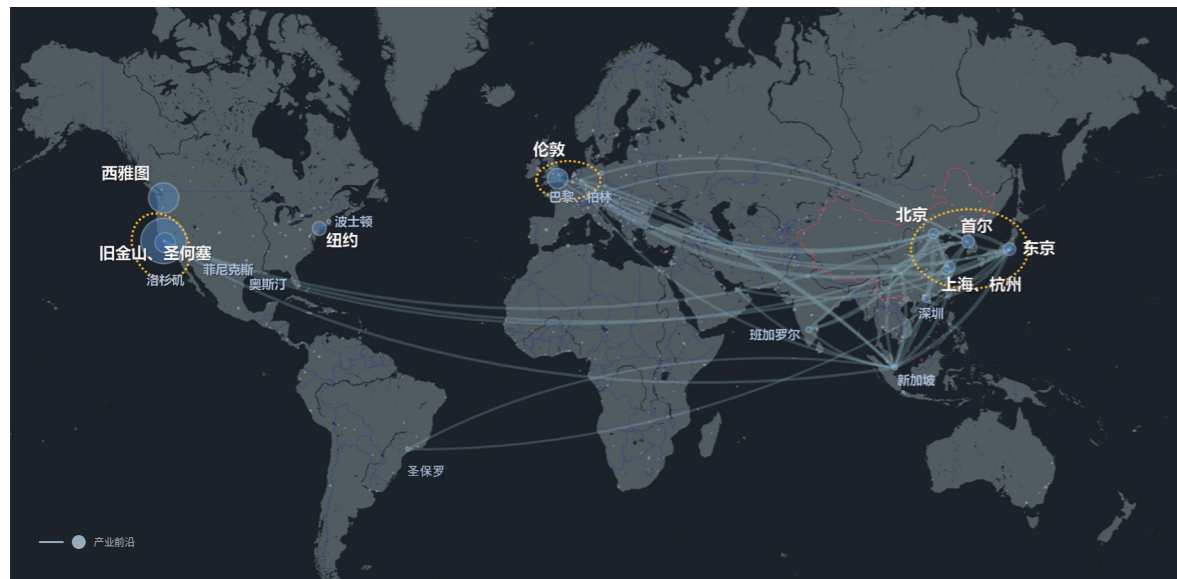


图 2-8 全球产业创新前沿网络格局 Figure 2-8 LANDSCAPE OF GLOBAL INDUSTRIAL INNOVATION FRONTIER NETWORK

表 2-3 产业创新前沿 TOP20 城市 Table 2-3 TOP 20 CITES IN INDUSTRIAL INNOVATION FRONTIER

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	旧金山 San Francisco	西雅图 Seattle	伦敦 London	圣何塞 San Jose	纽约 New York	首尔 Seoul	东京 Tokyo	上海 Shanghai	北京 Beijing	杭州 Hangzhou	深圳 Shenzhen	菲尼克斯 Phoenix	班加罗尔 Bangalore	新加坡 Singapore	洛杉矶 Los Angeles	波士顿 Boston	柏林 Berlin	巴黎 Paris	圣保罗 Sao Paulo	奥斯汀 Austin

位。此外，新兴市场和发展中经济体城市涌现，如雅加达凭借广阔消费市场和活跃创业生态，2021 年以来新增 5 家独角兽企业。

半导体是数字经济的基石，高度依赖全球产业分工协作。中美贸易战以来，欧美韩等国纷纷加大芯片产业投资以提升供应链安全，《2022 年芯片和科学法案》的签署更进一步加剧了半导体产业的逆全球化危机。基于三大前沿分析，半导体领域的创新中心以旧金山湾区（圣克拉拉、圣何塞等）、东京都市圈（东京、筑波、横滨等）、欧洲（剑桥、埃因霍温等）以及中国台湾（新竹）

five new unicorns have been established in Jakarta since 2021. The city is known for its vast consumer market and dynamic entrepreneurial ecosystem.

Semiconductors are the cornerstone of digital economy and highly dependent on global division of labor. Since the start of the US-China trade war, the US, Europe and South Korea have all increased investment in the chip industry to enhance supply chain security. The signing of the CHIPS and Science Act of 2022 has further exacerbated the crisis of deglobalization in the semiconductor industry. According to the analysis of the above three frontiers, the innovation centers in the semiconductor industry are mainly located in the San Francisco Bay Area (Santa Clara and San Jose), the Greater Tokyo Area (Tokyo, Tsukuba and Yokohama), Europe (Cambridge and Eindhoven) and

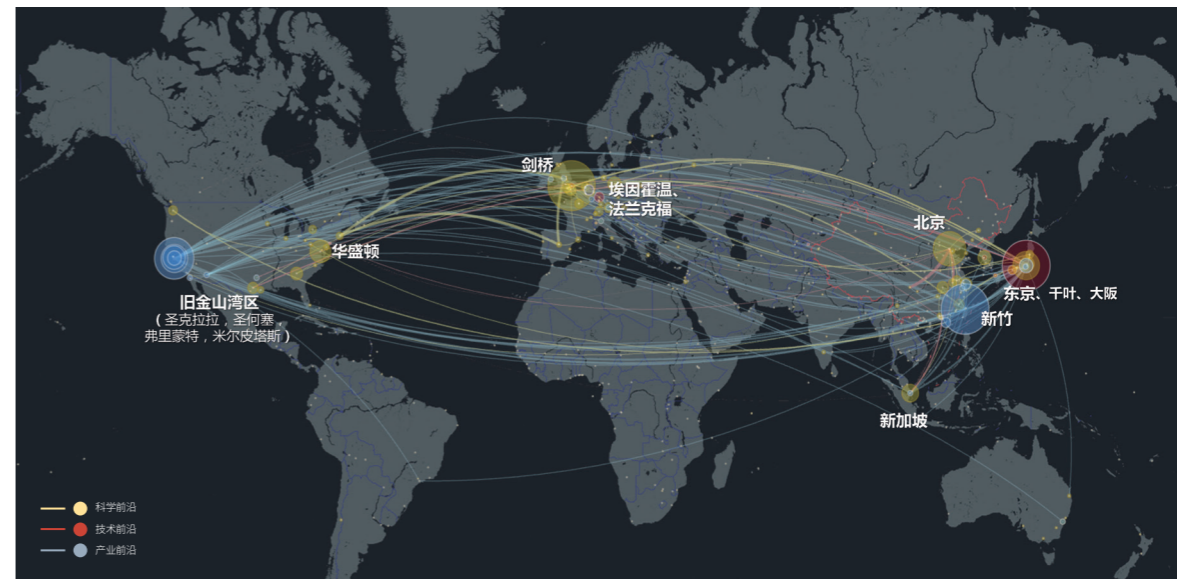


图 2-9 全球半导体领域前沿网络格局 Figure 2-9 LANDSCAPE OF GLOBAL SEMICONDUCTOR FRONTIER NETWORK

为主，中国城市如北京、上海、武汉、香港等在基础研究领域有一定基础，但技术和产业化方面仍有巨大差距。随着科研封闭趋势持续酝酿和传播，全球化的创新体系面临解体，全球创新生态面临巨大挑战。

Taiwan of China (Hsinchu). Chinese cities such as Beijing, Shanghai, Wuhan and Hong Kong have made progress in basic research, yet they still lag far behind in terms of technology and industrialization. As the trend of deglobalization in scientific research is brewing worldwide, the globalized innovation system has been stretched to the breaking point and the global innovation ecosystem is facing great challenges.

## 2.3 全球生产与服务网络：生产更分散、服务更集聚 GLOBAL PRODUCTION AND SERVICE NETWORK: DECENTRALIZED PRODUCTION AND CENTRALIZED SERVICE

在全球产业变革背景下，北美、西欧及北欧、东亚上榜全球生产网络前百强城市减少，上榜全球服务网络前百强城市增多，呈现生产更分散、服务更集聚的空间特征。在前 20 位城市中，北京、东京仍旧稳居前两位，新加坡、台北、深圳、巴黎等在战略性新兴产业或制造智能化中有突出表现的城市排名稳固或提升。此外，随着全球新能源产业进入繁荣期，部分战略资源型城市迎来新机遇，如智利首都圣地亚哥，集聚了引领全球锂电池技术发展的大型企业，发展潜力巨大。

In the context of global industrial transformation, the number of cities in North America, Western Europe, Northern Europe, and East Asia that enter the top 100 list of the global production network have increased. Meanwhile, the production network is more decentralized whereas the service network becomes more centralized. Among the top 20 cities, Beijing and Tokyo remain in the top positions, while Singapore, Taipei, Shenzhen, Paris and other cities with outstanding performance in strategic emerging industries or intelligent manufacturing have maintained or improved their rankings. In addition, as the global new energy industry enters a booming period, cities with abundant strategic resources are embracing new opportunities. For instance, Santiago, the capital of Chile, with numerous large enterprises that lead the global development of lithium battery technology, enjoys great development potential.





图 2-10 全球传统汽车及新能源汽车制造代表性企业布局<sup>4</sup>  
Figure 2-10 DISTRIBUTION OF REPRESENTATIVE CONVENTIONAL AND NEW ENERGY VEHICLE MANUFACTURERS<sup>4</sup>

**生产分散化：北美、西欧及北欧、东亚三大板块周边成为新增长点**

在全球生产网络维度，产业方向变革带动生产优势城市阵型的变化。以汽车制造业为例，随着新能源汽车需求爆发，全球汽车制造中心从底特律、

**Decentralized Production: North America, Western and Northern Europe, and East Asia as New Sources of Growth**

In the global production network, the trend of industrial transformation has changed the matrix of cities with advantages in production. Taking automotive manufacturing as an example, with explosive demands for new energy vehicles, the global automotive manufacturing centers

表 2-4 全球生产网络 TOP20 城市 Table 2-4 TOP 20 CITES IN GLOBAL PRODUCTION NETWORK

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	北京 Beijing	东京 Tokyo	首尔 Seoul	上海 Shanghai	台北 Taipei	新加坡 Singapore	香港 Hong Kong	深圳 Shenzhen	广州 Guangzhou	迪拜 Dubai	伦敦 London	哥本哈根 Copenhagen	里加 Riga	巴塞罗那 Barcelona	孟买 Mumbai	旧金山 San Francisco	波哥大 Bogota	武汉 Wuhan	鹿特丹 Rotterdam	圣地亚哥 (智利) Santiago (Chile)

<sup>4</sup> 选取梅赛德斯奔驰、福特、本田、特斯拉、比亚迪为样本企业，数据来源企业官网，仅识别工厂、研发职能所在地。 Mercedes-Benz, Ford Motor, Honda Motor, Tesla and BYD are selected as sample companies, with data sourced from their official websites, identifying only the locations of factories and R&D functions.

科隆、柏林、东京，走向引领全球生产方式革新的旧金山、上海、深圳。同时，由于全球产业链供应链格局调整重塑，生产优势城市分布趋于分散，北美、西欧及北欧、东亚上榜前百强城市数量占比从2021年的56%下降至50%，相应中美、东欧及南欧等周边区域上榜城市数量增加。

**服务集聚化：北美、西欧及北欧、东亚三大板块城市占比更加提升**

在全球服务网络维度，服务优势城市分布趋于集聚，北美、西欧及北欧、东亚上榜前百强城市数量占比从2021年的50%上升至54%。在服务业数字化、网络化、智能化趋势下，纽约、伦敦稳居前列，都柏林、伊斯坦布尔等边缘门户城市崛起。由于国际金融及专业服务业格局调整，东欧、南欧地区的保加利亚、罗马尼亚、乌克兰、克罗地亚、塞尔维亚等新兴市场和发展中经济体城市排名相对下降。

have shifted from Detroit, Cologne, Berlin, and Tokyo to San Francisco, Shanghai, and Shenzhen who are leading the global innovation of automotive production. Meanwhile, due to the reshaping of global supply chains, the distribution of cities with advantages in production tend to decentralize. The proportion of top 100 cities in North America, Western Europe, Northern Europe, and East Asia has decreased from 56% of the total last year to 50%, with more cities in Central America, Eastern Europe and Southern Europe making the list.

**Centralized Service: Cities in Western and Northern Europe, and East Asia Account for A Higher Proportion**

In the global service network, cities with advantages in service tend to cluster. The proportion of top 100 cities in North America, Western Europe, Northern Europe and East Asia has increased from 50% of the total in 2021 to 54%. Following the trend of digitalization, networking and intelligence, New York and London continue to hold the top positions, while gateway cities in the peripheral areas like Dublin and Istanbul are on the rise. Due to the readjustment to the landscape of international finance and professional services, the rankings of cities in the emerging markets and developing countries in Eastern Europe and Southern Europe such as Bulgaria, Romania, Ukraine, Croatia and Serbia have dropped.

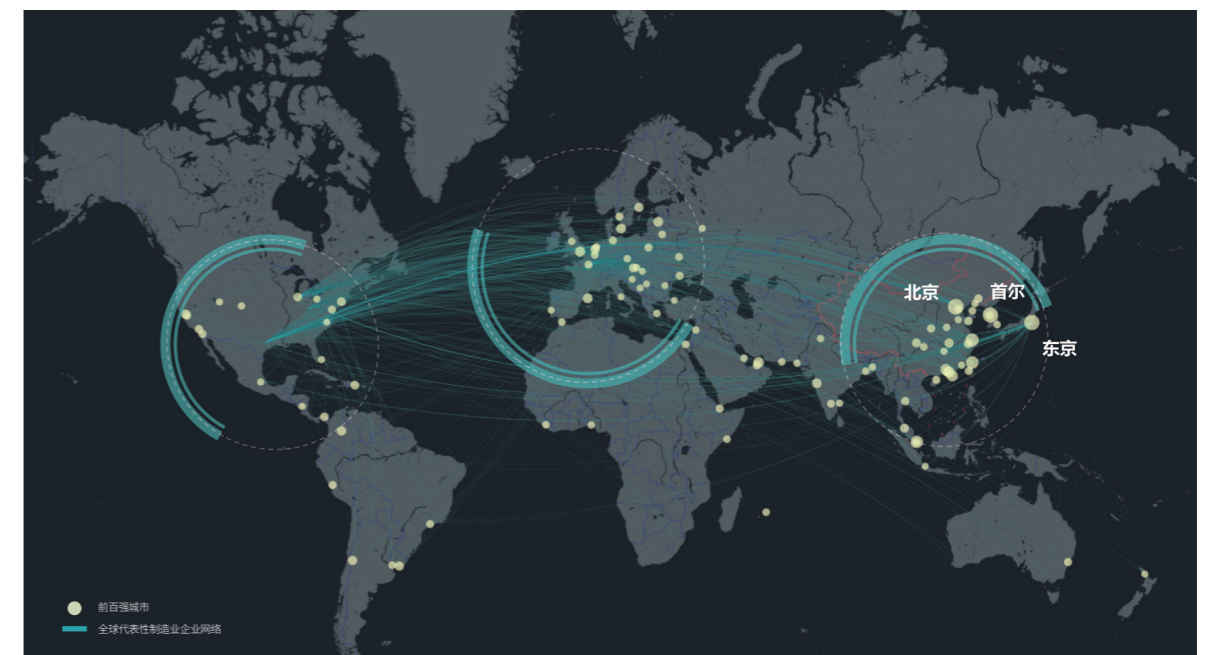


图 2-11 全球生产网络格局 Figure 2-11 LANDSCAPE OF GLOBAL PRODUCTION NETWORK

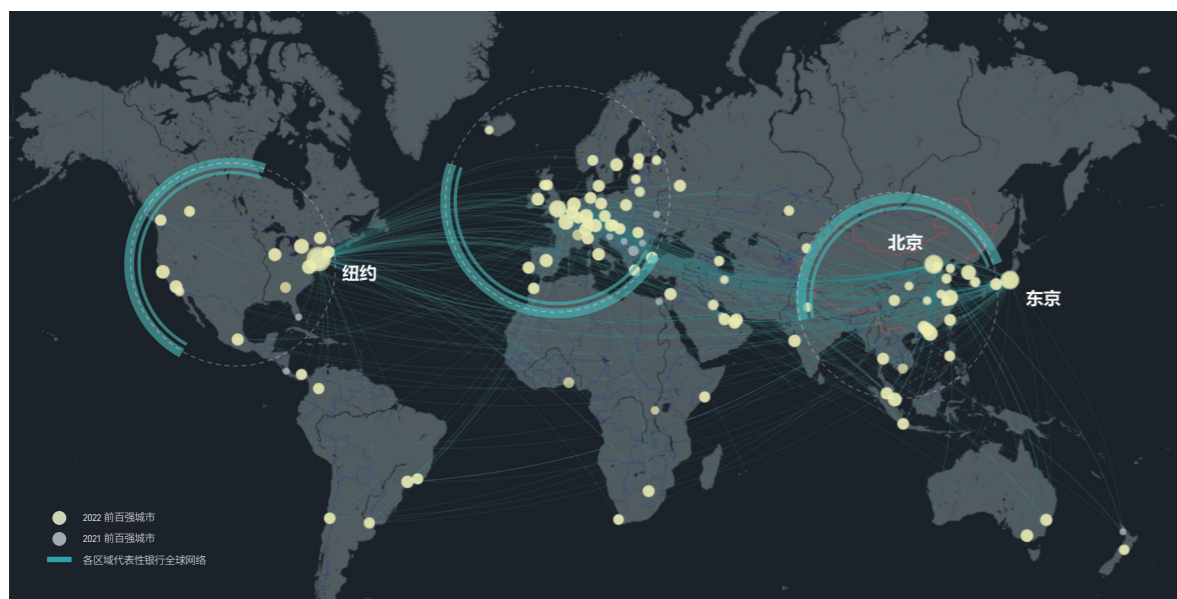


图 2-12 全球服务网络格局 Figure 2-12 LANDSCAPE OF GLOBAL SERVICE NETWORK

表 2-5 全球服务网络 TOP20 城市 Table 2-5 TOP 20 CITIES IN GLOBAL SERVICE NETWORK

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	纽约 New York	北京 Beijing	东京 Tokyo	伦敦 London	上海 Shanghai	巴黎 Paris	多伦多 Toronto	香港 Hong Kong	首尔 Seoul	华盛顿 Washington	法兰克福 Frankfurt	阿姆斯特丹 Amsterdam	新加坡 Singapore	深圳 Shenzhen	旧金山 San Francisco	马德里 Madrid	慕尼黑 Munich	芝加哥 Chicago	斯德哥尔摩 Stockholm	都柏林 Dublin

## 2.4 全球联通设施网络：全球动荡持续，门户枢纽城市保持领先地位 GLOBAL FACILITY CONNECTIVITY NETWORK: CONTINUED GLOBAL TURMOIL AND LEADING PERFORMANCE OF GATEWAY HUB CITIES

在新冠疫情、贸易摩擦、地缘冲突等重大国际事件的影响下，设施联通“流”的特征，相对敏感地展现了全球城市联通性的时空波动。从全球范围看，亚太、北美两大板块表现出较好的活力与“韧性”，欧洲则普遍下滑。上海、新加坡、东京、芝加哥等世界级门户枢纽城市在设施联通网络中表现突出，其中芝加哥、东京在全球航空服务水平名列前茅，新加坡、上海则主要得益于全球领先的海运服务水平。

In the midst of COVID-19, trade frictions and geopolitical conflicts, the flow of facility connectivity has keenly responded to the temporal and spatial variation in the connectivity among global cities. Globally speaking, the Asia-Pacific and North America show stronger dynamism and resilience, while Europe is largely in decline. World-level gateway hubs like Shanghai, Singapore, Tokyo and Chicago have impressive performance in the facility connectivity network. Chicago and Tokyo rank among the top for their global airline services, whereas Singapore and Shanghai stand out for their world-class maritime transport services.

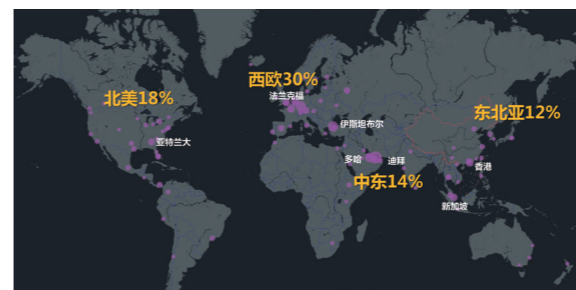


图 2-13 国际中转客流 TOP100 机场分布 (2019Q1)  
Figure 2-13 DISTRIBUTION OF TOP 100 AIRPORTS BY INTERNATIONAL TRANSIT PASSENGER (2019 Q1)

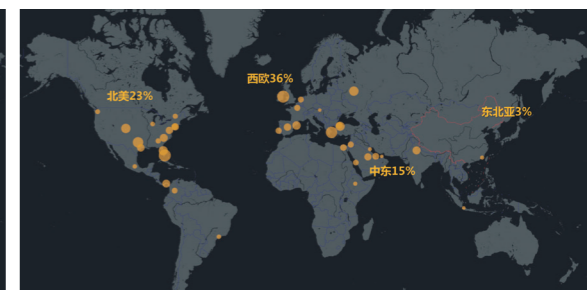


图 2-14 国际中转枢纽 TOP100 机场中枢纽职能韧性较强的机场分布 (2022Q1)  
Figure 2-14 DISTRIBUTION OF TOP 100 AIRPORTS WITH RESILIENT INTERNATIONAL TRANSIT HUB FUNCTIONS (2022Q1)

表 2-6 航空服务水平 TOP20 城市 Table 2-6 TOP 20 CITIES IN AIRLINE TRANSPORT SERVICE

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	芝加哥 Chicago	亚特兰大 Atlanta	东京 Tokyo	达拉斯 Dallas	新德里 New Delhi	伊斯坦布尔 Istanbul	洛杉矶 Los Angeles	迈阿密 Miami	阿姆斯特丹 Amsterdam	丹佛 Denver	西雅图 Seattle	法兰克福 Frankfurt	纽约 New York	波士顿 Boston	迪拜 Dubai	广州 Guangzhou	马德里 Madrid	雅加达 Jakarta	伦敦 London	巴黎 Paris

### 航空：全球整体复苏反弹，亚太不增反降

2022年，全球航空客运航班持续复苏，美、中、英航班量排名前三，其中欧美各国国内和国际航班同比增长较快，中国则主要为国内航班。对比疫情前国际航空枢纽格局，总体呈现北美枢纽国际中转“韧性”显著、西欧缓慢回升的特征，芝加哥、亚特兰大在国际航空服务水平维度表现突出，而中国城市均有较明显下滑。

### 海运：全球运量相对稳定，重大事件引发波动

一系列“黑天鹅”事件对全球物流和供应链带来重大影响，全球物流体系不断面临“韧性”挑战。近年来，以海运为主要载体的全球大宗物资运输总量相对稳定，局域波动显著，受国际事件影响敏感，多式联运成为发展趋势。综合来看，新加坡、上海等国际航运中心在海运服务水平维度保持了较强“韧性”，香港在该维度排名略有下滑。

### Aviation: Overall Recovery of Global Performance with a Surprising Decline in the Asia-Pacific

In 2022, global air passenger traffic has continued to recover, with the US, China and the UK ranking in the top three in terms of scheduled flights. The year-on-year growth of domestic and international flights in Europe and the US is faster, while the growth in China is mainly driven by domestic flights. Compared to the landscape of international airline hubs before the pandemic, the international transit hubs in North America show significant resilience, while the rebound in Western Europe is slow. Chicago and Atlanta have excellent performance in the dimension of international airline services, while the performance of Chinese cities is in clear decline.

### Maritime Transport: Relative Stability in Global Volume and Volatility Triggered by Major Events

A series of black swan events had a significant impact on global logistics and supply chains, and the resilience of the global logistics system has been put to the test. In recent years, the global transportation of commodities, which is largely seaborne, has remained stable in quantity, in spite of strong local fluctuations. As a result of the international events, multimodal transport has become a trend. Generally speaking, in terms of maritime transport service, the performance of international shipping hubs such as Singapore and Shanghai are quite resilient, but Hong Kong's ranking slightly drops.

表 2-7 海运服务水平 TOP20 城市 Table 2-7 TOP 20 CITIES IN MARITIME TRANSPORT SERVICE

排名 Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
城市 City	新加坡 Singapore	上海 Shanghai	宁波 Ningbo	深圳 Shenzhen	香港 Hong Kong	釜山 Busan	鹿特丹 Rotterdam	青岛 Qingdao	汉堡 Hamburg	伦敦 London	厦门 Xiamen	东京 Tokyo	天津 Tianjin	迪拜 Dubai	雅典 Athens	纽约 New York	大连 Dalian	名古屋 Nagoya	广州 Guangzhou	墨尔本 Melbourne

**信息：欧美、东亚领跑通信领域**

随着数字全球化时代到来，传统商品、服务和资本的跨境流动趋缓，无形的数据和信息的跨境流动激增。目前美国、中国、欧洲、韩国是全球 5G 等新兴信息技术重要设施布局的目标区域，非洲、东南亚等欠发达国家和地区加快接入现代化通信设施网络，推动城市化与工业化进程并获得发展机会。

**Information: Europe, US and East Asia Are Leading the Telecom Sector**

With the advent of digital globalization, the cross-border flow of traditional goods, services and capital is slowing down, whereas that of intangible data and information is skyrocketing. Currently, the infrastructure of emerging information technologies such as 5G is mainly deployed in the US, China, Europe, and South Korea, while less developed countries and regions such as Africa and Southeast Asia are accelerating their efforts to expand access to modern communication networks to promote urbanization and industrialization for better development opportunities.

表 2-8 各维度上的领先城市 Table 2-8 TOP CITIES IN THREE DIMENSIONS

排名 Ranking	全球创新网络 Global Innovation Network	全球生产与服务网络 Global Production and Service Network	全球联通设施网络 Global Connectivity Facility Network
1	东京 Tokyo	北京 Beijing	上海 Shanghai
2	旧金山 San Francisco	东京 Tokyo	新加坡 Singapore
3	北京 Beijing	首尔 Seoul	东京 Tokyo
4	伦敦 London	纽约 New York	芝加哥 Chicago
5	上海 Shanghai	上海 Shanghai	洛杉矶 Los Angeles
6	首尔 Seoul	新加坡 Singapore	宁波 Ningbo
7	深圳 Shenzhen	伦敦 London	深圳 Shenzhen
8	纽约 New York	香港 Hong Kong	伦敦 London
9	新加坡 Singapore	台北 Taipei	纽约 New York
10	西雅图 Seattle	深圳 Shenzhen	亚特兰大 Atlanta
11	巴黎 Paris	迪拜 Dubai	香港 Hong Kong
12	香港 Hong Kong	广州 Guangzhou	迪拜 Dubai
13	慕尼黑 Munich	旧金山 San Francisco	釜山 Busan
14	洛杉矶 Los Angeles	孟买 Mumbai	广州 Guangzhou
15	圣迭戈（美国） San Diego (USA)	巴黎 Paris	达拉斯 Dallas
16	波士顿 Boston	哥本哈根 Copenhagen	迈阿密 Miami
17	柏林 Berlin	斯德哥尔摩 Stockholm	青岛 Qingdao
18	杭州 Hangzhou	华盛顿 Washington	鹿特丹 Rotterdam
19	剑桥 Oxford	芝加哥 Chicago	丹佛 Denver
20	悉尼 Sydney	维也纳 Vienna	西雅图 Seattle

## “一带一路”潜力城市

### BELT AND ROAD POTENTIAL CITIES

### 3.1 总体格局：欧亚大陆城市成为推动包容性发展的中坚力量

#### GENERAL LANDSCAPE: EURASIAN CITIES HAVE BECOME THE BACKBONE OF INCLUSIVE DEVELOPMENT

“一带一路”潜力前百强城市中，欧洲、大洋洲上榜城市数量较去年显著增多，亚洲上榜城市在前二十强中占比近半，头部带动作用突出。随着“一带一路”倡议深入推进，欧亚大陆城市在促进政策沟通稳定，保障设施联通通畅，强化贸易与资金紧密往来，推动民心相通走向深入等方面发挥了重要作用，成为践行包容性全球化发展理念的中坚力量。

In the top 100 list for Belt and Road Potential Cities, there is a considerable increase in the number of cities from Europe and Oceania. Asian cities continue to demonstrate their leading roles, accounting for nearly half of the top 20 cities on the list. As the Belt and Road Initiative further advances, Eurasian cities are playing an important role in facilitating smooth policy coordination, safeguarding unhindered facility connectivity, strengthening unimpeded trade and financial integration and deepening people-to-people bond. They have thus become the backbone of inclusive development in the globalization process.

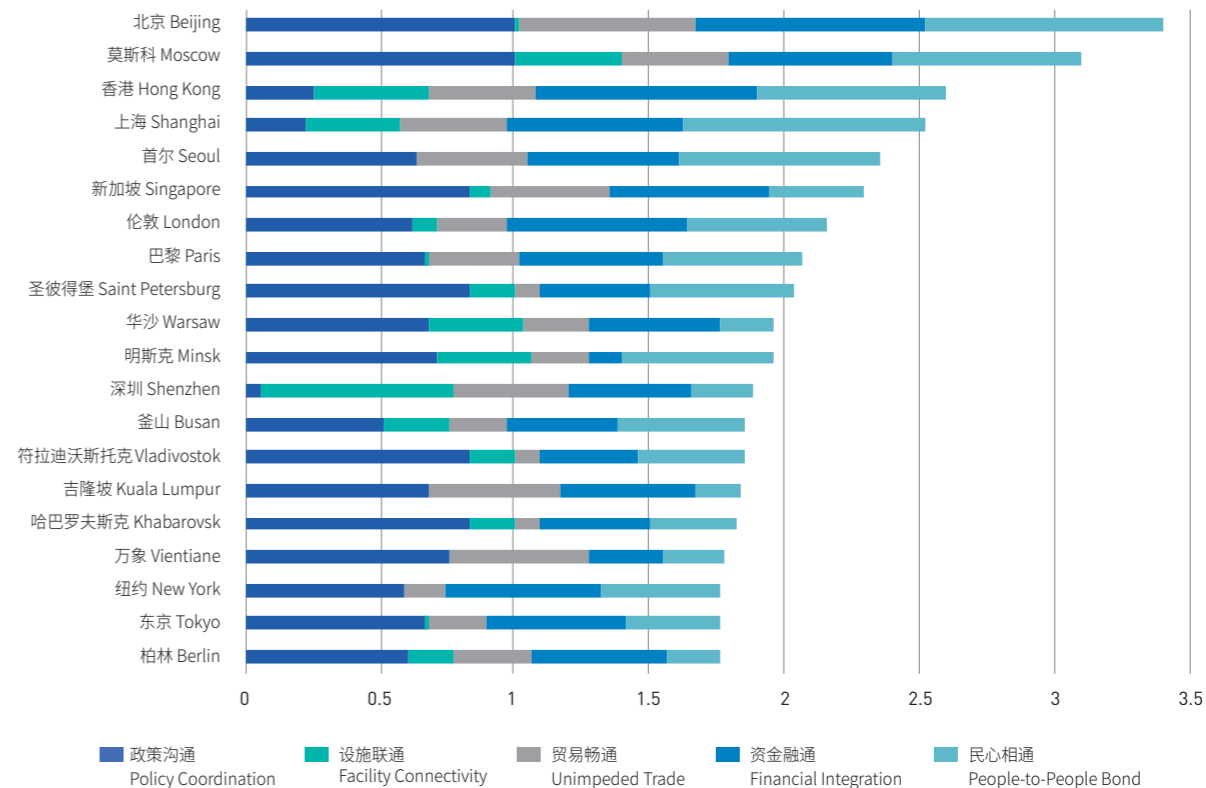


图 3-1“一带一路”潜力城市指数排名及得分（前 20 位）

Figure 3-1 RANK AND SCORE OF THE INDEX FOR BELT AND ROAD POTENTIAL CITIES (TOP 20)

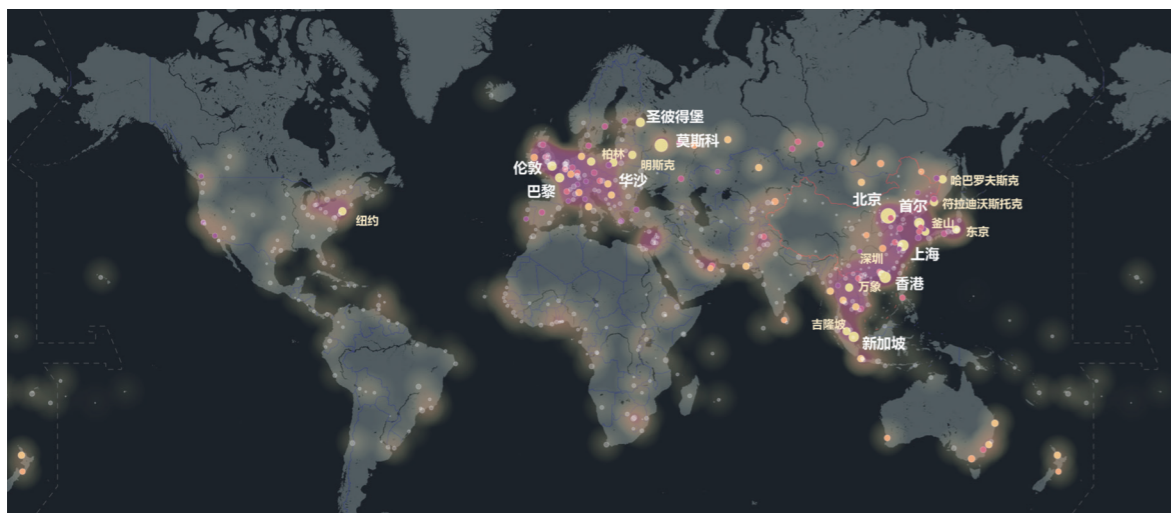


图 3-2 “一带一路”潜力城市格局 Figure 3-2 LANDSCAPE OF BELT AND ROAD POTENTIAL CITIES

欧亚大陆城市在前二十强榜单中表现亮眼，伦敦、巴黎、华沙与首尔排名较去年有小幅提升，柏林首次进入前 20 位，釜山也重回前 20 位。俄罗斯城市整体表现得到提升，莫斯科从去年第 3 位上升到第 2 位，圣彼得堡和哈巴罗夫斯克重回前 20 位，符拉迪沃斯托克首次进入前 20 位。

The top 20 list features impressive performance of Eurasian cities. London, Paris, Warsaw and Seoul all witness slight improvements in their rankings over last year. Berlin makes into the top 20 list for the first time. Busan also find its way back to the top 20. Russian cities have seen general improvements in their performance, with Moscow moving upward by one position to the 2nd place, Saint Petersburg and Khabarovsk coming back to the top 20 list and Vladivostok entering the list for the first time.

### 3.2 政策沟通潜力：朋友圈广泛拓展，友好城市数量稳中有进 POTENTIAL FOR POLICY COORDINATION: CIRCLE OF FRIENDS EXPANDS EXTENSIVELY, ALONG WITH STEADY INCREASE IN FRIENDSHIP CITIES

“一带一路”政策沟通朋友圈持续向更广泛区域拓展，今年在拉美、非洲等地区取得新进展。今年阿根廷正式加入“一带一路”大家庭，改变了长期以来拉美主要经济体都未正式加入“一带一路”倡议的状况。非洲作为“一带一路”倡议的重点政策沟通地区，今年也取得了新突破，马拉维加入“一带一路”朋友圈。

The circle of friends for policy coordination under the Belt and Road Initiative continues to expand into wider region, with new progress made in Latin America and Africa this year. Argentina, as a major economy in Latin America, has officially joined the community of the Belt and Road Initiative. It has reversed the situation of long-standing absence of major Latin American economies under the Belt and Road Initiative. Africa, as a priority region for policy coordination, has also made a new breakthrough, with Malawi joining the circle of friends for the Belt and Road Initiative.

“一带一路”政策沟通的传统友好城市保持稳定，中国同俄罗斯、中亚、泛亚地区的城市关

The traditional friendship cities on policy coordination under the Belt and Road Initiative remain stable, with further strengthened intercity relationships between China and Russia, Central Asia and Pan-Asian

系进一步巩固。政策沟通排名前 20 位城市主要分布在中蒙俄经济走廊、中国 - 中南半岛经济走廊和中巴经济走廊沿线国家的城市，是政策沟通领域最为紧密的合作区域。作为“一带一路”倡议发起国的首都，北京今年仍高居政策沟通榜单的首位。

region. Most of the top 20 cities on policy coordination are distributed along the China-Mongolia-Russia Economic Corridor (CMREC), the China-Indochina Peninsula Economic Corridor (CICPEC) and the China-Pakistan Economic Corridor (CPEC), which represent the regions with the closest cooperation on policy coordination. As the capital of the initiator of the Belt and Road Initiative, Beijing remains at the top of the list for its potential in policy coordination.

### 3.3 设施联通潜力：铁路与港口设施短期扰动，总体格局稳定 POTENTIAL FOR FACILITY CONNECTIVITY: GENERAL STABILITY MAINTAINS DESPITE OF SHORT-TERM DISRUPTIONS IN RAILWAY AND PORT FACILITIES

尽管铁路与港口运输遭遇短期扰动，得益于强大的港口联通能力以及国际货运班列持续投入等因素，深圳、青岛、香港稳步发展，持续占据设施联通维度的前 3 位。

In spite of the short-term disruptions in railway and port transportation, Shenzhen, Qingdao and Hong Kong continue to top the list for facility connectivity with stable development, thanks to their strong port connectivity and continuous investment in international freight trains.

以中欧班列等为代表的跨境铁路仍是促进“一带一路”城市联结的重要通道。地缘冲突使得中欧班列部分线路被迫改道，运输效率和能力受到一定影响，但预期逐步趋向稳定。此外，西部陆海新通道、中老铁路等通道价值显现，为跨境铁路服务提供更丰富的可能性。2022 年，经满洲里、霍尔果斯等铁路口岸进出境中欧班列稳步提升，带来哈尔滨、乌鲁木齐等主要枢纽排名上升。

As represented by the China Railway Express (CRE) between China and Europe, cross-border railways continue to serve as an important channel to connect cities along the Belt and Road Initiative. Due to geopolitical conflicts, the China Railway Express had to change some of its routes, which to a certain extent undermined the transportation efficiency and capacity. But it is expected to gradually stabilize. In addition, the New International Land-Sea Trade Corridor in western China and the China-Laos Railway are demonstrating their value in delivering greater possibilities for cross-border railway services. The steady increase in freight trains of the China Railway Express through Manzhouli, Horgos and other railway ports leads to improved rankings for major hubs like Harbin and Urumqi in 2022.

中国港口经营恢复，海外运营港口不断拓展。招商局港口、上海国际港务集团等港口运营商积极推进东南亚、南亚、欧美等地区的商业投资，扩大港口投资建设布局，助力沿线港口城市提升国际影响力。深圳、香港、上海、宁波在港口联通方面维持领先，其中，上海、宁波等城市港口的船舶到港航次、载重和箱量均名列前茅。

Chinese ports have recovered their operations, along with further expansion in overseas port operations. Port operators such as China Merchants Port and Shanghai International Port Group have taken an active approach to their commercial investment in Southeast Asia, South Asia, Europe and the US, with efforts to extend port investment and construction towards greater international influence for ports along the Belt and Road Initiative. Shenzhen, Hong Kong, Shanghai and Ningbo all maintain their leading positions on port connectivity, with Shanghai and Ningbo topping the list of port cities on number of port calls, cargo tonnage and container volume.

### 3.4 贸易畅通潜力：中国对外贸易快速复苏，东亚和南美城市联系紧密 POTENTIAL FOR UNIMPEDED TRADE: RAPID RECOVERY IN CHINA'S FOREIGN TRADE, WITH CLOSE TIES WITH EAST ASIAN AND SOUTH AMERICAN CITIES

得益于中国内地对外贸易的快速复苏，北京、上海保持在贸易畅通榜单的前10位，2021年全年北京、上海地区进出口总值分别跨越3万亿元和4万亿元大关，对共建“一带一路”国家进出口快速增长。深圳、广州提升明显，分别进入前10位以及前20位，粤港澳大湾区作为我国开放程度最高、经济活力最强的区域之一，对外贸易表现出了强劲活力。

随着区域全面经济伙伴关系协定（RCEP）的签署和正式生效，亚太地区自由贸易发展步入新阶段，RCEP成员国万象、吉隆坡、新加坡、首尔、雅加达进入今年贸易畅通榜单前20位。此外，中国也在积极拓展在南美地区的贸易市场，与南美等发展中国家城市的贸易增速较快，今年南美上榜贸易畅通前百强的城市排名整体提升，巴西等多个城市进入前百强。

### 3.5 资金融通潜力：欧洲城市整体上升，亚洲头部城市表现突出 POTENTIAL FOR FINANCIAL INTEGRATION: GENERAL UPGRADE AMONG EUROPEAN CITIES AND OUTSTANDING PERFORMANCE OF ASIAN FRONT RUNNERS

由于在海外移动支付和人民币跨境结算支付方面的突出表现，欧洲成为上榜资金融通百强城市数量增加最多的区域。并且俄罗斯多家银行加入人民币跨境支付系统（CIPS），拓展了跨境人民币业务在欧洲的市场，东欧地区成为今年资金融通百强城市上榜增速较快的地区，莫斯科首度进入了榜单前20名。

东亚地区虽然上榜资金融通百强的城市数量有所减少，但在前二十强中仍占较多席位，北京、香港和上海等头部城市表现突出。近年来，中国积

Thanks to the rapid rebound of foreign trade in Chinese mainland, Beijing and Shanghai maintain their top 10 positions on unimpeded trade. Their total import and export value exceeded RMB 3 trillion and RMB 4 trillion respectively in 2021, with rapid increase in both imports and exports with the Belt and Road countries. Shenzhen and Guangzhou both move upward substantially, leapfrogging into the top 10 list and top 20 list respectively. As one of the regions with the highest degree of openness and economic vitality, the Guangdong-Hong Kong-Macao Greater Bay Area has shown strong momentum in foreign trade.

The signing and entry into force of Regional Comprehensive Economic Partnership (RCEP) ushered in a new stage of free trade development in the Asia-Pacific region. RCEP parties such as Vientiane, Kuala Lumpur, Singapore, Seoul and Jakarta all make to the top 20 list for unimpeded trade in 2022. Besides, China is also actively expanding its trade market in South America, resulting in fairly fast growth in trade with developing countries in the region. There is general improvements in the rankings of South American cities in the top 100 list for unimpeded trade, with Brazil and many other cities entering the top 100.

Due to their outstanding performance in overseas mobile payment and RMB cross-border settlement, Europe cities has witnessed the largest increase in numbers in the top 100 list for financial integration. With multiple Russian banks joining the RMB Cross-border Inter-bank Payment System (CIPS), the market for cross-border RMB settlement further expanded in Europe. Eastern Europe becomes a fast-growing region on the top 100 list for financial integration in 2022. Moscow also makes into the top 20 for the first time.

Although the number of East Asian cities on the top 100 list has contracted, they have still taken up a large proportion of the top 20 list, with strong performance of front runners like Beijing, Hong Kong and Shanghai. China has taken proactive measures in recent years to

积极推进 CIPS 的建设，将其打造成为服务人民币国际化的金融基础设施。这一系统的直接参与者主要集中在以北京、上海和香港为主的东亚地区城市。同时，香港作为国际金融中心，也是全球最大的离岸人民币业务中心，为“一带一路”资金融通提供了强大的金融支持。

### 3.6 民心相通潜力：文化交流成为民心联系纽带，东亚东欧热度持续升高 POTENTIAL FOR PEOPLE-TO-PEOPLE BOND: CULTURAL EXCHANGES BECOME THE TIES FOR PEOPLE-TO-PEOPLE BOND, AS EAST ASIAN AND EASTERN EUROPEAN CITIES STEP UP COOPERATION

东亚、东欧文化圈的城市在文化交流中扮演了沟通桥梁和传播枢纽的作用，各有3个城市上榜前二十强，较2021年均增加1个。首尔、莫斯科、明斯克等城市是中国的传统友好城市，与中国存在紧密的城市网络、科教网络联系，而海外文化中心的设立以及持续的活动开展深化了城市间的文化网络联系，成为中外文化交流互鉴的重要桥梁，跻身全球前20位。此外，纽约、巴黎、伦敦作为世界艺术文化中心，也展现出强大的文化影响力。

疫情背景下，文化交往和互鉴成为“一带一路”民心相通的强力纽带，国内历史文化名城的文化展示和传播水平迈上新台阶，国际影响力快速提升，对“一带一路”沿线辐射作用明显。北京排在民心相通榜单第2位，上海、西安、天津、杭州等历史文化名城排名上升，这些城市通过不断推动文化创新发展，积极参与国际跨文化交流合作，引领“一带一路”多元文化相通共融。

promote CIPS, in an effort to build it into a financial infrastructure to facilitate internationalization of the RMB. The direct participants of the system are mostly concentrated in East Asia, such as Beijing, Shanghai and Hong Kong. In the meantime, Hong Kong also functions as an international financial center, as well as the world's largest offshore center for RMB business, offering powerful support for financial integration of the Belt and Road Initiative.

Cities within the East Asian and Eastern European cultural spheres are bridges and communication hubs in cultural exchanges, with three cities in each region making to the top 20 list, up by one compared with 2021. Cities like Seoul, Moscow and Minsk are traditional friendship cities of China, with closely-interconnected urban, scientific and education networks. The setup of overseas cultural center and their ongoing activities further deepened the ties of intercity cultural networks. They have thus become important bridges for cultural exchanges and mutual learning, entering into the top 20 list for people-to-people bond. In addition, as international centers of art and culture, New York, Paris and London have also demonstrated strong cultural influence.

Given the context of the pandemic, cultural exchanges and mutual learning have become powerful ties for people-to-people bond along the Belt and Road Initiative. National historical and cultural cities of China managed to break new ground in showcasing and disseminating their cultural legacies, leading to rapid increase in international influence and clear spillover effect along the Belt and Road Initiative. Beijing takes up the 2nd place on the list, along with improved rankings for other historical and cultural cities like Shanghai, Xi'an, Tianjin and Hangzhou. With their ongoing efforts to push for development in cultural innovation and active participation in cross-cultural exchanges and cooperation, these cities are leading the course for intercultural communication and integration with great diversity under the Belt and Road Initiative.

## 城市观察

### OBSERVATION ON GLOBAL CITIES

今年，我们选取东京、深圳、伦敦、西安、河内作为样本，对这些城市在全球化以及“一带一路”中的参与表现进行深入观察。东京蝉联全球活力城市指数榜首，在全球城市的动荡中展现了较强韧性；深圳与伦敦分别代表创新与服务优势城市，在高度压力下积极探索前行之道，并在“一带一路”倡议中也展现出优秀的合作潜力；西安是中国向西开放的重要门户枢纽，依靠区位优势与特色资源，为我国西部城市参与全球发展探索了新路径；河内秉持多边开放的政策，成为在全球贸易体系重构过程中快速成长的城市范本之一。

The report this year has covered a representative sample of global cities, including Tokyo, Shenzhen, London, Xi'an and Hanoi. They have been observed and analyzed in terms of engagement in globalization and the Belt and Road Initiative. Tokyo tops the ranking of Global Dynamic Cities Index again, demonstrating remarkable resilience against all odds. Shenzhen and London, through exploring new way to forge ahead, have shown advantages in innovation and service respectively, and both of them have unleashed huge potential in their BRI endeavors. Xi'an has proved itself as an important gateway in the western region of China to opening up; due to its geographical location and unique resources, it has become a pioneer in finding new paths for cities in the region to participate in globalization. Hanoi, through implementing multilateral trading policies, has set a good example for adapting to the restructuring of global trading system.

#### 4.1 东京：“三网”共振铸就城市实力 TOKYO: SYNERGY OF TRIPLE NETWORKS FOR IMPRESSIVE STRENGTH

2022年，东京凭借强大综合实力蝉联全球活力城市指数榜首，“三网”协同造就了其核心竞争力以及在多重危机下的强大韧性。然而，国际汇市震荡、供应链重组、城市人口产业风险等内外挑战持续存在。通过营造全球包容的城市环境，东京持续拓展国际市场以驱动本土发展，并在充满变数的世界环境中坚定遵循长期发展策略、谋划稳健的行动以应对已知和未知的挑战。

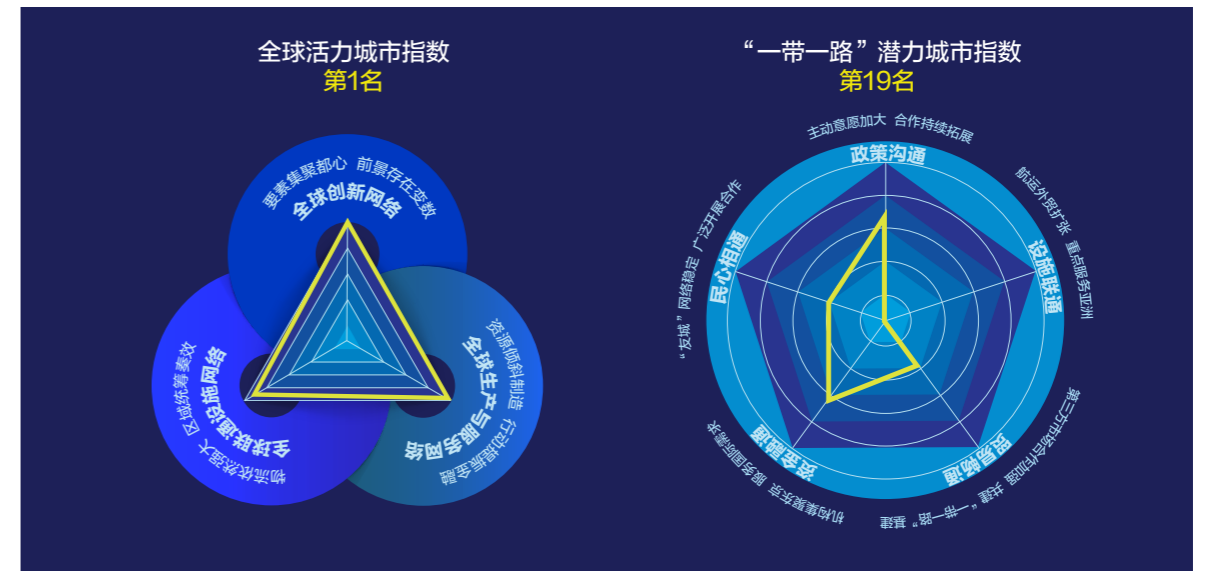
In 2022, Tokyo tops the Global Dynamic Cities Index again as its triple networks have contributed to its high degree of competitiveness and incredible resilience to multiple crises. However, domestic and international challenges, including volatile currency market, restructuring of supply chains and risks in urban development continue to exist. Tokyo has been working on building a more inclusive urban environment and expanding its global reach to drive domestic growth. In a world of uncertainties, its consistency in long-term development strategies and action plans enables it to counter existing and future challenges.

##### 全球城市活力：制造业加速“三网”协同发展

东京汇聚了日本半数左右的国际顶尖企业，细分行业中电子、电器设备行业的公司数量最多。在过去的十余年间，东京制造业的企业研发经费投入一直维持日本领先的高位水平，东京-横滨城市群 PCT 专利申请量全球领先。多年来，东京

##### Global Dynamic City: Manufacturing sector leads coordinated development of the Triple Network

Tokyo is home to more than half of Japan's most recognizable international companies, most of which are manufacturers of electronics and household appliances. Its R&D investment in manufacturing has been leading the country for more than a decade and the number of PCT filings of Tokyo-Yokohama Cluster has been leading the world.



的国内外联通设施网络为生产与服务网络提供支撑，在产业不断升级的过程中又推动了本土创新网络的活力发展——“三网”的相辅相成助其连夺全球活力城市指数桂冠。

For years, the global facility connectivity of Tokyo enables its global production and service network to grow and upgrade, which in turn drives the development of its innovation network. The synergy of the triple networks is key to Tokyo's first place in the ranking as the most dynamic global city.

##### “一带一路”潜力：官民协力加强多边合作，共同开拓多方市场

东京政策、资金等维度网络发达。近年来，随着官方态度的逐渐缓和，东京企业与中方一同积极参与多边合作，共同拓宽“一带一路”沿线市场。东京海外企业的贸易协定利用率高，在 RCEP 生效后参与度更是急速攀升，未来东京港与上海、深圳、青岛等城市港口进出口联系将进一步紧密、货物交换体量将进一步加大。

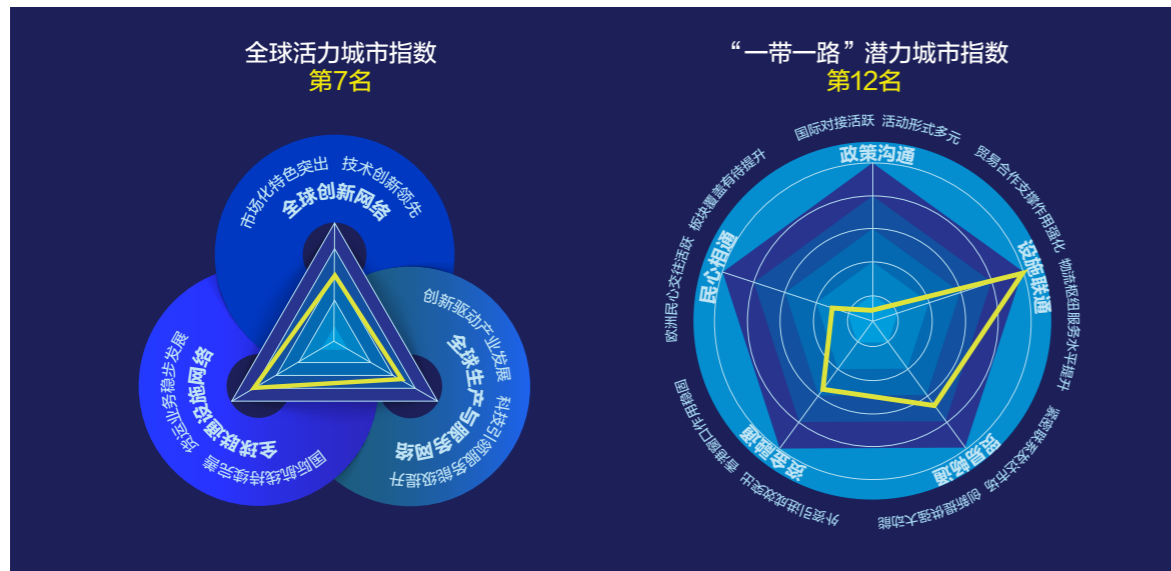
##### Belt and Road Potential: Expanding markets through multilateral cooperation of the government and businesses

Tokyo has full-fledged networks in terms of trade policies and capital. Thanks to easing tensions between China and Japan, companies based in Tokyo have started to actively work with Chinese partners in multilateral cooperation and expansion of markets along the Belt and Road Initiative. Tokyo's companies have high FTA utilization rates, which have witnessed even stronger growth since RCEP entered into effect. Therefore, the connection between Tokyo and cities with major ports such as Shanghai, Shenzhen and Qingdao is expected to grow, which will give a boost to bilateral trade in goods.

#### 4.2 深圳：创新支撑嵌入全球城市网络 SHENZHEN: INNOVATION-DRIVEN INTEGRATION INTO THE GLOBAL CITIES NETWORK

深圳是我国对外开放和发展改革的试验田和排头兵、中国式现代化的样本，经济模式高度外向，作为依靠全球化成长起来的创新型城市，

As the pioneer in China's reform and opening up, Shenzhen has been developing through a process of trial and error. And it has become a model city of Chinese-style modernization with a highly export-oriented economy. The city benefits from globalization in its innovation-driven



在“技术脱钩”加速背景下肩负着创新突围的使命。此外，深圳紧密结合自身技术优势，在海外贸易、对外投资、对外基建等领域开展了大量实践，在“一带一路”倡议中发挥了独特作用。

#### 全球城市活力：市场化创新引领开放发展

深圳创新的市场研发、转化、产业化动力充沛，驱动制造业高质量发展，成为支撑深圳压力中前行的重要力量。深圳技术创新能力全球领先，PCT 专利申请总量仅次于东京，其中通信、人工智能、新能源汽车及新能源领域技术创新水平进入全球第一阵营。依赖本土创新型跨国企业的全球布局，深圳创新合作呈现外向且高度集中的特征，在新加坡、慕尼黑等城市形成“专利合作飞地”。但科技博弈与高成本“挤出”效应不断增大等内外挑战下，深圳近年独角兽产出较少、后继乏力，主导产业的产业链供应链稳定性、安全性亟待提升，多元活跃的城市创新生态面临难以继的风险。

growth, thus it is in the vanguard of tackling the challenges brought by accelerated technological decoupling. Shenzhen has already made use of its technological advantages in a wide range of economic activities, including international trade, foreign investment and overseas infrastructure projects, demonstrating its unique role in the Belt and Road Initiative.

#### Global Dynamic City: Market-oriented innovation leading the way

With increasing momentum in market research, product development, technology commercialization and industrial production, Shenzhen has seen high-quality growth of the manufacturing industry and maintained economic stability in spite of difficulties. It is one of the most innovative cities in the world with PCT filings second only to Tokyo. In particular, it is at the forefront of global innovation in telecommunication, artificial intelligence, new energy vehicles (NEVs), and renewable energy. By utilizing the global network of Shenzhen-based international companies, the city has been making progress in international cooperation on innovation with carefully-chosen partnerships, such as the patent-related cooperation with Singapore and Munich. However, due to the high costs of tech rivalry as well as the increasing crowding out effect, few unicorns have emerged in the city in recent years, leading to a lack of sustainable competitiveness. There is an urgent need to improve the stability and security of major industrial and supply chains. Otherwise, the future of the dynamic and pluralistic innovation system could be jeopardized.

#### “一带一路”潜力：创新、产业、政策优势支撑打造重要节点

深圳依托独特的创新、产业、政策等优势，在“一带一路”中的参与表现逐步提升。设施联通方面，深圳以不断拓展的海外港口网络、持续增长的货运业务，在推进基础设施互联互通方面表现突出。贸易畅通方面，深圳关区 AEO 高级认证企业数量超 300 家，涵盖华为、比亚迪等深圳领军企业，这些企业为深圳对外贸易经济提供了强大动能。但受制于行政层级与资源本底，深圳在政策沟通、民心相通方面的发展相比仍有不足。

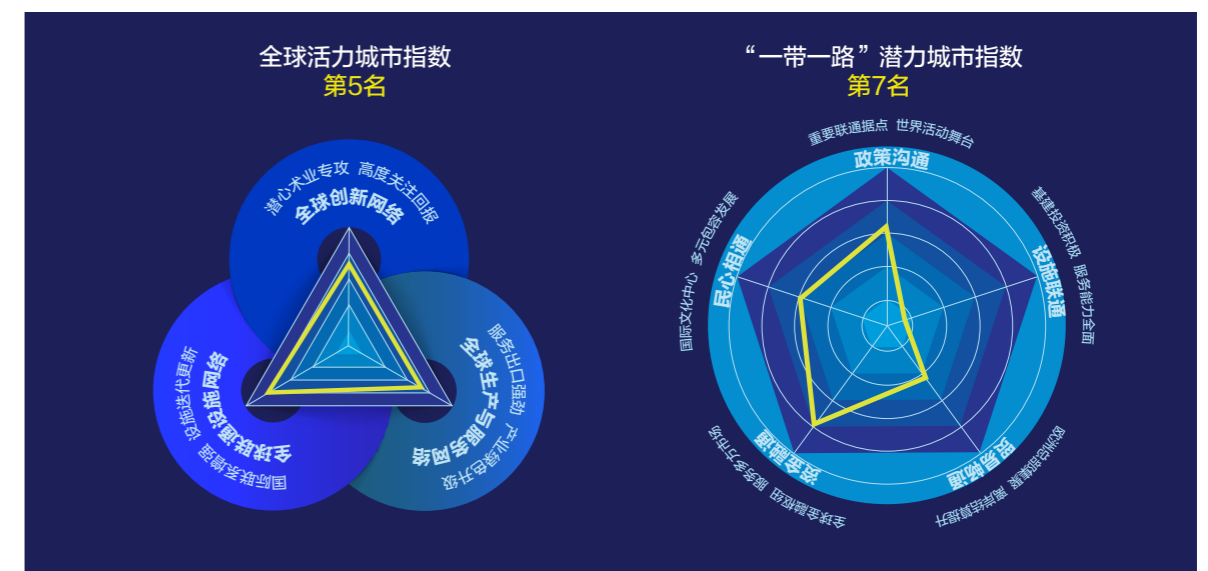
#### Belt and Road Potential: Building up advantages through innovation, production and policy framework

Shenzhen has steadily improved performance under the Belt and Road Initiative thanks to its advantages in innovation capacity, industrial development and policy framework. In terms of facility connectivity, Shenzhen has been including more overseas ports in its network and increasing its freight services, thus it has earned a high ranking in upgrading infrastructure. In terms of unimpeded trade, Shenzhen has more than 300 companies with Authorized Economic Operator(AOE) status, including local industrial leaders Huawei and BYD Company, providing powerful boost to its international trade. However, its administrative limits and resource constraints have led to insufficiency in policy coordination and people-to-people exchange.

### 4.3 伦敦：多重危机下的城市服务转型 LONDON: TRANSFORMING SERVICES AMID MULTIPLE CRISES

继英国脱欧、新冠疫情后，英国首都伦敦今年继续面临政府债务高企、能源短缺、通货膨胀、政治矛盾、汇率波动等因素导致的经济危机，是本年度深陷全球动荡漩涡的中心城市之一。然而，伦敦持续以开放、强大的市场再次建立良好的财富管理信誉，凭借全球领先的金融和专业服务能力维持了城市韧性。

After Brexit, London, as the capital of UK, continues to face a variety of challenges including government debt, energy shortage, inflation, political turmoil, currency fluctuations and other risks that are threatening its economic development in the post-pandemic world. It is one of the cities right at the center of global uncertainties. In spite of all odds, London has re-established its reputation in wealth management and demonstrated great resilience through maintaining its leading role in financial service and other services.



**全球城市活力：绿色产业引领城市高位迭代升级**

作为新晋的欧洲可持续创新中心，伦敦是英国推行“绿色产业革命”战略的“领头羊”。与“全能”的东京相比，伦敦更加专注于绿色产业链中的商业价值实现，三大维度中均有通过“净零”升级实现更高回报率的行为。例如，伦敦是2017年以来全球气候技术融资累计第二大“吸金”区域，仅次于美国旧金山湾区；2021年世界第一的“绿色金融中心”，通过可持续金融科技赋能行业发展。

**“一带一路”潜力：专业全能服务支撑国际合作**

服务出口强劲的伦敦一直是全球化经济的最大受益城市之一，完善的专业服务网络是支撑其国际多元市场的强大后盾，“一带一路”相关服务是其中的重要组成部分。例如，伦敦所持有三分之一倡议成员的债券和27个成员国或地区半数以上的股票，亚洲基础设施投资覆盖大部分倡议成员国或地区等。2021年，伦敦持续成为全球最大的人民币外汇和离岸支付（除香港外）双中心，合作潜力持续提升。

**4.4 西安：丝路经济带上的开放门户**  
XI'AN: THE SILK ROAD GATEWAY TO OPENING-UP

西安是丝绸之路的东方起点和中华文明重要的发源地，“硬科技”发展基础坚实。立足区位、科技、产业、人文等综合比较优势，西安着力增强关键核心领域源头创新和自主创新能力，积极参与全球经贸、人文交流和国际合作，为我国西部地区城市扩大开放与转型发展探索了新模式、新路径。

**全球城市活力：“硬科技”引领经济发展**

西安在全球活力城市排名中位列国内第二梯队。不同于深圳市场导向的创新模式，西安创新主

**Global Dynamic City: Green industry is driving urban transformation in the new era**

As an emerging center of sustainability-driven innovation in Europe, London is leading UK's Green Industrial Revolution. While its rankings on each dimension are not as high as Tokyo, it has a more pronounced commitment to commercialization of green industrial chains, securing higher return on investment on each dimension through implementing Net Zero Strategy. For example, since 2017, London has become the second largest center for financing climate-tech, following San Francisco Bay Area; in 2021, the leading global center of green finance has continued to drive industrial development through sustainable finance.

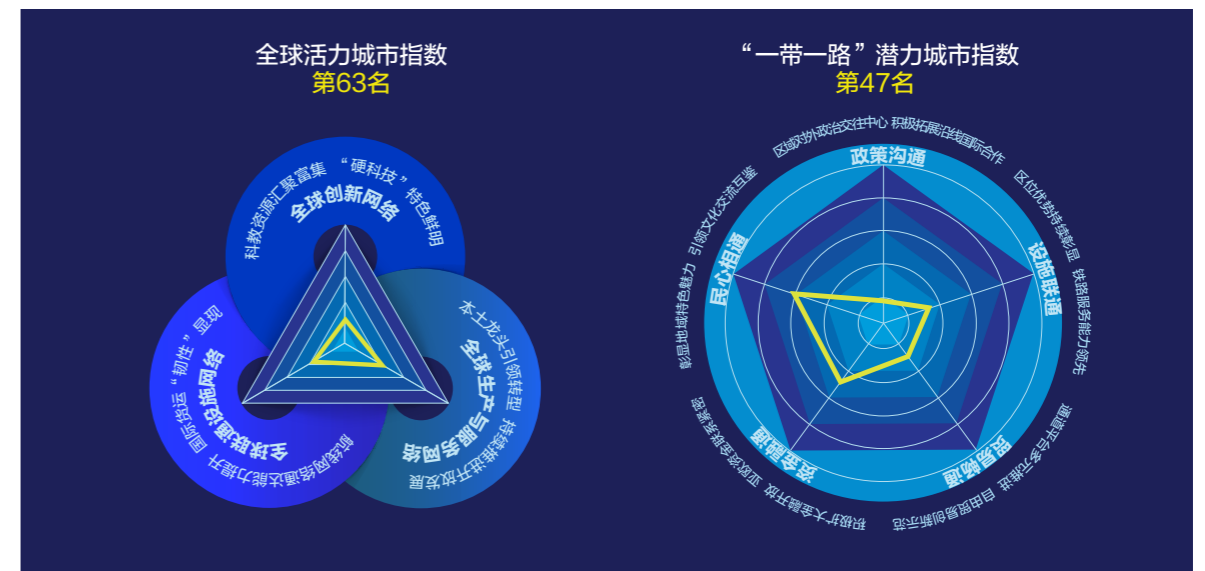
**Belt and Road Potential: International cooperation underpinned by professional services**

Robust export of services has made London one of the biggest beneficiaries of economic globalization. A fully-fledged service network is key to its diversified international marketing, with BRI-related services being part of it. For example, one third of the Belt and Road countries have bonds listed on London Stock Exchange and 27 members have witnessed more than half of their companies listed on LSE. Its Asian infrastructure investment services cover most of the member countries or regions under the Belt and Road Initiative. In 2021, London remained the biggest RMB foreign exchange hub in the world and the second biggest offshore RMB payments center (second to Hong Kong), creating huge potential for further cooperation.

Xi'an used to be an eastern gateway of the ancient silk routes and a cradle of Chinese civilization. The city has a solid foundation in developing key technologies. By harnessing its advantages in geographical location, high-tech industry and people-to-people change, Xi'an is committed to independent innovation in core areas and has been increasingly active in global trade, cultural exchange and international cooperation, setting a brilliant example of further opening-up and industrial restructuring for other cities in the vast western region of China.

**Global Dynamic City: Key technologies are leading economic development**

In the Global Dynamic Cities Index, Xi'an is a second-tier city in China. Different from the market-oriented innovation in Shenzhen, innovation of



要依靠当地科研院所和高校，聚焦新能源、新材料、高端装备、航空航天、核工业等国家战略科技领域，“硬科技”特色鲜明。依托创新优势领域与工业基地本底优势，西安在全球生产网络中取得较好表现。其通过积极引进电子信息、高端装备等先进制造业领域外资企业落户，推动本地能源行业龙头向新能源转型发展，不断筑牢生产优势基础。“国产替代”给西安带来新的机遇，但科学创新水平不高、国际科技合作联系不足等问题也给西安未来跨越发展带来新的挑战。

**“一带一路”潜力：商贸物流、人文交往优势彰显**

西安把握“一带一路”建设机遇，在设施联通、民心相通领域表现突出。西安是联通欧亚、承东启西、连接南北的重要交通枢纽，依托中欧班列长安号的高质量稳定运行，西安的“一带一路”铁路服务水平位居全球前列，与上合组织成员国以及丝路沿线国家的投资和贸易往来稳步提升，枢纽功能与向西开放价值不断强化，成为带动西部地区参与“一带一路”的门户枢纽与服务中枢。

Xi'an has been driven by local research institutes and higher educational institutions with a tech-intensive focus on new energy, new materials, high-end equipment, aerospace engineering, nuclear industry and other areas of national strategic importance. It has also delivered good performance in terms of its global production and service network by utilizing strength in innovation and experience as a long-time industrial base. In addition, Xi'an has continuously reinforced its industrial advantages by inviting international manufacturers of electronics and high-end equipment to set up operations and encouraging local energy giants to transition into the new energy realm. However, despite the fact that Xi'an is benefiting from the import substitution industrialization (ISI), new challenges have emerged as it is still lagging behind in terms of high-quality innovation and international scientific cooperation.

**Belt and Road Potential: Outstanding performance in trade of goods and people-to-people exchange**

Xi'an has excelled in facility connectivity and people-to-people exchange as it has fully utilized opportunities presented under the Belt and Road Initiative. It is an important transportation hub not only for China but also for Eurasia. Thanks to Chang'an China Railway Express, freight rail lines connecting China and Europe, Xi'an secured a high position through railway services along the Belt and Road Initiative. Its bilateral trade and investment with SCO members and BRI members has witnessed steady growth, further enhancing its role as a transportation hub and a model of opening-up in the western part of China. It will continue to



此外，西安作为世界文化名城、古丝绸之路起点，依托丰富的中华文化资源，在“一带一路”民心相通领域的潜力不断提升，逐步发展成为对外交流交往的重要平台。

## 4.5 河内：贸易体系重构过程的“中间人” HANOI: AN INTERMEDIARY IN INTERNATIONAL TRADE

在国际供应链进一步切割和重构的进程中，河内依托国家全球贸易“中间人”策略，成为在全球制造变局中成长最快的世界城市之一。近年来，河内积极利用区位优势承接全球生产外溢需求，借助产业发展乘势推动城市“三网”能级提升和区域转型升级。随着全球贸易壁垒不断增多，河内首都圈未来国际“中转”生产服务或将更具潜力。

### 全球城市活力：产业发展优势与挑战并存

近年来，以河内为中心的越北经济区成为了中美贸易战背景下的重要进出口“中介”之一，产业地位不断提升，城市集群化发展模式正在形成。

lead the region in engaging in the Belt and Road Initiative and providing related services. In addition, as a world-renowned city for its culture and a starting point of the ancient silk routes, Xi'an has valuable cultural resources to contribute to people-to-people exchange and has become a new platform for international communication.

With global supply chains being restructured and division of labor being reorganized, Hanoi has emerged as one of the fastest-growing cities in the world's manufacturing landscape by taking the role of an intermediary in international trade. In recent years, it has succeeded in taking on spillover demand from other parts of the world. It has resulted in improvements in its triple networks and reshaped its role in the region. As trade barriers continue to grow, Hanoi Capital Region may become a vibrant transit center in global supply chains.

### Global Dynamic City: Industrial advantages coexisting with challenges

In recent years, the Northern Key Economic Region with Hanoi at its center has played an important intermediary role amid China-US trade disputes. As a result, it has gained increasing strength in industrial development and has been showing positive results through

分析显示，多家国际知名企业在数轮区域供应链调整后仍然选择扩大河内及其周边地区的生产网络，这或许得益于河内至中国紧密的产业和物流联系。然而，全域产业“来料加工”特点明显、核心生产要素成本与供应稳定性已不具优势，对产业链把控能力的欠缺也将为其打造“世界工厂”之路增添一定阻碍。

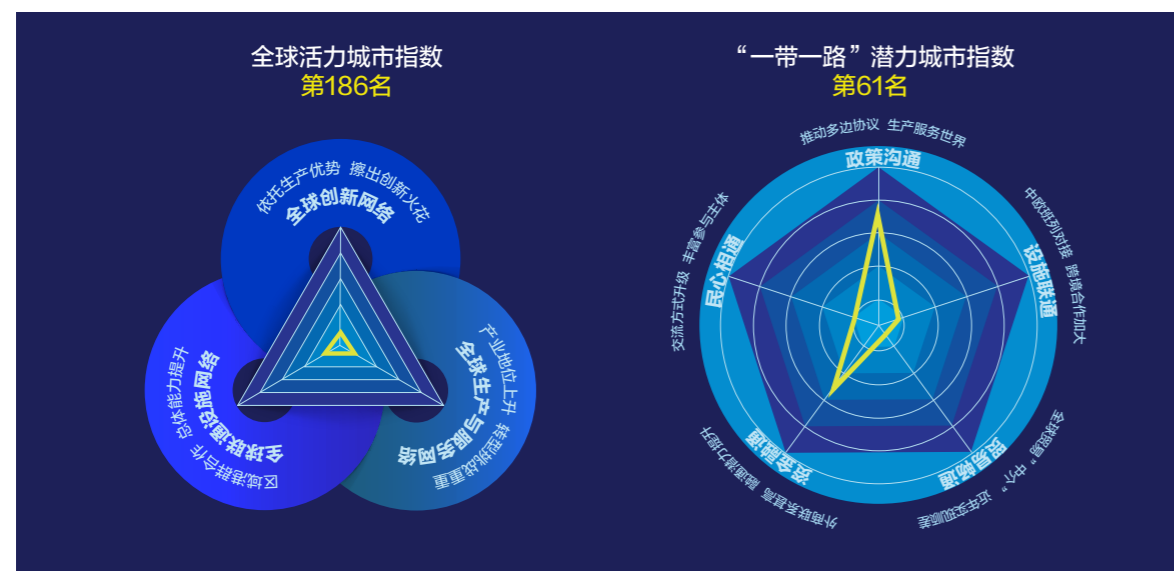
### “一带一路”潜力：全球化多边体系的践行者

越南自推行“革新开放”国策起，便不断加快签订全球多边贸易协议，目前已与世界200余个市场建立了贸易关系，近十年来持续领跑全球自由贸易特定原产地证书签发数量榜首。今年8月，首列西安-河内国际货运班列开通实现了中欧班列与中越线路的无缝衔接，助力中欧班列服务拓展至更广泛的东盟市场，进一步推动区域城市参与“一带一路”合作。

agglomeration. Many international companies continue to use their production networks in Hanoi and its neighboring regions after several rounds of regional supply chain restructuring. This can be attributed to Hanoi's close ties with industrial production and logistics in China. However, its industrial development is mainly driven by processing materials from other countries and its advantages in key factors of production and stable supply are shrinking. The insufficiency in managing the whole industrial chains would become an obstacle on its path to a global manufacturing hub.

### Belt and Road Potential: Fully committed to a multilateral trading system

Since the launch of its Doi Moi economic reforms, Vietnam has witnessed fast growth in newly-signed multilateral trade agreements and has established trade ties with more than 200 countries and regions. And it has maintained the top position in terms of the number of FTA Certificates of Origin issued over the past decade. In August, the first Xi'an-Hanoi freight train went into operation, allowing for seamless connection between the rail routes between China-Europe and China-Vietnam. It will give a boost to the service of China Railway Express in ASEAN and better engage cities of ASEAN countries under the Belt and Road Initiative.



### 说明 Notes:

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## 附录 1：2022 年全球活力城市指数排名

## APPENDIX 1: 2022 RANKING OF GLOBAL DYNAMIC CITIES INDEX

排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking	排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking	排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking
1	日本 Japan	东京 Tokyo	—	26	西班牙 Spain	马德里 Madrid	↑	51	荷兰 The Netherlands	鹿特丹 Rotterdam	↓
2	中国 China	上海 Shanghai	—	27	印度 India	孟买 Mumbai	↑	52	比利时 Belgium	布鲁塞尔 Brussels	↑
3	中国 China	北京 Beijing	—	28	美国 USA	西雅图 Seattle	↑	53	俄罗斯 Russia	莫斯科 Moscow	↓
4	新加坡 Singapore	新加坡 Singapore	↑	29	韩国 Korea	釜山 Busan	↑	54	意大利 Italy	罗马 Rome	↑
5	英国 U.K.	伦敦 London	↓	30	德国 Germany	法兰克福 Frankfurt	↑	55	中国 China	宁波 Ningbo	↑
6	美国 USA	纽约 New York	—	31	德国 Germany	慕尼黑 Munich	↓	56	美国 USA	丹佛 Denver	↑
7	中国 China	深圳 Shenzhen	↑	32	中国台湾 Taiwan, China	台北 Taipei	—	57	中国 China	南京 Nanjing	↓
8	韩国 Korea	首尔 Seoul	—	33	中国 China	杭州 Hangzhou	↓	58	智利 Chile	圣地亚哥 Santiago	↑
9	美国 USA	旧金山 San Francisco	↓	34	澳大利亚 Australia	墨尔本 Melbourne	↓	59	波兰 Poland	华沙 Warsaw	↑
10	中国香港 Hong Kong, China	香港 Hong Kong	—	35	中国 China	天津 Tianjin	↓	60	捷克 Czech	布拉格 Prague	↓
11	美国 USA	洛杉矶 Los Angeles	↓	36	中国 China	成都 Chengdu	↓	61	印度 India	新德里 New Delhi	↑
12	美国 USA	芝加哥 Chicago	↑	37	美国 USA	圣迭戈 San Diego	↓	62	爱尔兰 Ireland	都柏林 Dublin	↑
13	中国 China	广州 Guangzhou	↓	38	巴西 Brazil	圣保罗 São Paulo	↑	63	中国 China	西安 Xi'an	↓
14	阿联酋 UAE	迪拜 Dubai	↓	39	奥地利 Austria	维也纳 Vienna	↓	64	泰国 Thailand	曼谷 Bangkok	↓
15	法国 France	巴黎 Paris	↓	40	中国 China	大连 Dalian	↑	65	希腊 Greece	雅典 Athens	↓
16	荷兰 The Netherlands	阿姆斯特丹 Amsterdam	↑	41	德国 Germany	柏林 Berlin	↓	66	中国 China	厦门 Xiamen	↓
17	美国 USA	亚特兰大 Atlanta	↑	42	挪威 Norway	奥斯陆 Oslo	↓	67	芬兰 Finland	赫尔辛基 Helsinki	↓
18	丹麦 Denmark	哥本哈根 Copenhagen	↓	43	土耳其 Turkey	伊斯坦布尔 Istanbul	↑	68	美国 USA	费城 Philadelphia	↓
19	美国 USA	华盛顿 Washington	—	44	日本 Japan	大阪 Osaka	↑	69	意大利 Italy	米兰 Milan	↓
20	美国 USA	波士顿 Boston	↑	45	中国 China	武汉 Wuhan	↑	70	美国 USA	达拉斯 Dallas	↑
21	德国 Germany	汉堡 Hamburg	—	46	加拿大 Canada	温哥华 Vancouver	↓	71	瑞士 Switzerland	日内瓦 Geneva	*
22	瑞典 Sweden	斯德哥尔摩 Stockholm	↓	47	哥伦比亚 Colombia	波哥大 Bogotá	↑	72	葡萄牙 Portugal	里斯本 Lisbon	↑
23	加拿大 Canada	多伦多 Toronto	↑	48	美国 USA	迈阿密 Miami	↑	73	西班牙 Spain	巴塞罗那 Barcelona	↑
24	澳大利亚 Australia	悉尼 Sydney	↑	49	瑞士 Switzerland	苏黎世 Zurich	↓	74	阿联酋 UAE	阿布扎比 Abu Dhabi	↓
25	中国 China	青岛 Qingdao	↑	50	印度尼西亚 Indonesia	雅加达 Jakarta	↑	75	匈牙利 Hungary	布达佩斯 Budapest	↑
								76	美国 USA	奥斯汀 Austin	↓
								77	马来西亚 Malaysia	吉隆坡 Kuala Lumpur	↑
								78	阿根廷 Argentina	布宜诺斯艾利斯 Buenos Aires	↑
								79	加拿大 Canada	蒙特利尔 Montreal	↓
								80	墨西哥 Mexico	墨西哥城 Mexico City	↓
								81	卢森堡 Luxembourg	卢森堡 Luxembourg	↓
								82	沙特阿拉伯 Saudi Arabia	利雅得 Riyadh	↑
								83	巴西 Brazil	里约热内卢 Rio de Janeiro	↓
								84	拉脱维亚 Latvia	里加 Riga	↑
								85	立陶宛 Lithuania	维尔纽斯 Vilnius	↓
								86	加拿大 Canada	卡尔加里 Calgary	↑
								87	英国 U.K.	爱丁堡 Edinburgh	↓
								88	中国 China	重庆 Chongqing	↓
								89	美国 USA	底特律 Detroit	↑
								90	斯洛伐克 Slovakia	布拉迪斯拉发 Bratislava	↑
								91	越南 Vietnam	胡志明 Ho Chi Minh	↑
								92	美国 USA	盐湖城 Salt Lake City	↑
								93	南非 South Africa	约翰内斯堡 Johannesburg	↑
								94	爱沙尼亚 Estonia	塔林 Tallinn	↓
								95	肯尼亚 Kenya	内罗毕 Nairobi	↑
								96	俄罗斯 Russia	圣彼得堡 Saint Petersburg	↓
								97	美国 USA	菲尼克斯 Phoenix	↑
								98	科威特 Kuwait	科威特 Kuwait	↑
								99	德国 Germany	斯图加特 Stuttgart	↓
								100	以色列 Israel	特拉维夫 Tel Aviv	↓

注：\* 为 2022 年新增城市

Note: Cities marked with \* are new additions to the list in 2022

## 附录 2: 2022 年“一带一路”潜力城市指数排名

## APPENDIX 2: 2022 RANKING OF INDEX FOR BELT AND ROAD POTENTIAL CITIES

排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking	排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking	排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking	排名 Ranking	国家 / 地区 Country/Region	城市 City	排名变化 Change in Ranking
1	中国 China	北京 Beijing	—	26	蒙古 Mongolia	乌兰巴托 Ulan Bator	↑	51	阿联酋 UAE	迪拜 Dubai	↓	76	俄罗斯 Russia	乌苏里斯克 Ussuriysk	↓
2	俄罗斯 Russia	莫斯科 Moscow	↑	27	意大利 Italy	罗马 Rome	↑	52	韩国 Korea	光州 Gwangju	↑	77	捷克 Czech	布拉格 Prague	↑
3	中国香港 Hong Kong, China	香港 Hong Kong	↓	28	俄罗斯 Russia	叶卡捷琳堡 Yekaterinburg	↑	53	中国 China	天津 Tianjin	↑	78	德国 Germany	杜塞尔多夫 Dusseldorf	*
4	中国 China	上海 Shanghai	—	29	缅甸 Myanmar	仰光 Yangon	↓	54	菲律宾 The Philippines	马尼拉 Manila	↓	79	中国 China	青岛 Qingdao	↓
5	韩国 Korea	首尔 Seoul	↑	30	德国 Germany	汉堡 Hamburg	↑	55	比利时 Belgium	布鲁塞尔 Brussels	↑	80	俄罗斯 Russia	下诺夫哥罗德 Nizhny Novgorod	↑
6	新加坡 Singapore	新加坡 Singapore	↓	31	新西兰 New Zealand	奥克兰 Auckland	↑	56	澳大利亚 Australia	堪培拉 Canberra	↑	81	波兰 Poland	罗兹 Lodz	↑
7	英国 U.K.	伦敦 London	↑	32	哈萨克斯坦 Kazakhstan	阿斯塔纳 Astana	↓	57	奥地利 Austria	维也纳 Vienna	↑	82	俄罗斯 Russia	比罗比詹 Birobidzhan	↓
8	法国 France	巴黎 Paris	↑	33	塞尔维亚 Serbia	贝尔格莱德 Belgrade	—	58	德国 Germany	法兰克福 Frankfurt	↓	83	土耳其 Turkey	伊斯坦布尔 Istanbul	↓
9	俄罗斯 Russia	圣彼得堡 Saint Petersburg	↑	34	巴基斯坦 Pakistan	卡拉奇 Karachi	↓	59	韩国 Korea	大田 Daejeon	↑	84	芬兰 Finland	赫尔辛基 Helsinki	↑
10	波兰 Poland	华沙 Warsaw	↑	35	澳大利亚 Australia	布里斯班 Brisbane	↑	60	中国 China	南京 Nanjing	↑	85	韩国 Korea	济州 Jeju	↑
11	白俄罗斯 Belarus	明斯克 Minsk	↓	36	俄罗斯 Russia	喀山 Kazan	↑	61	越南 Vietnam	河内 Hanoi	↓	86	希腊 Greece	雅典 Athens	↑
12	中国 China	深圳 Shenzhen	↑	37	哈萨克斯坦 Kazakhstan	阿拉木图 Almaty	↓	62	巴基斯坦 Pakistan	伊斯兰堡 Islamabad	↓	87	中国 China	杭州 Hangzhou	↑
13	韩国 Korea	釜山 Busan	↑	38	意大利 Italy	米兰 Milan	↑	63	法国 France	里昂 Lyon	↑	88	美国 USA	洛杉矶 Los Angeles	↓
14	俄罗斯 Russia	符拉迪沃斯托克 Vladivostok	↑	39	卢森堡 Luxembourg	卢森堡 Luxembourg	↑	64	俄罗斯 Russia	托木斯克 Tomsk	↓	89	德国 Germany	慕尼黑 Munich	↓
15	马来西亚 Malaysia	吉隆坡 Kuala Lumpur	↓	40	中国 China	武汉 Wuhan	↑	65	中国 China	广州 Guangzhou	↓	90	泰国 Thailand	清迈 Chiang Mai	↓
16	俄罗斯 Russia	哈巴罗夫斯克 Khabarovsk	↑	41	爱尔兰 Ireland	都柏林 Dublin	↑	66	英国 U.K.	曼彻斯特 Manchester	↑	91	美国 USA	旧金山 San Francisco	↓
17	老挝 Laos	万象 Vientiane	↓	42	俄罗斯 Russia	赤塔 Chita	↑	67	西班牙 Spain	马德里 Madrid	↑	92	加拿大 Canada	温哥华 Vancouver	↑
18	美国 USA	纽约 New York	↓	43	澳大利亚 Australia	墨尔本 Melbourne	↑	68	英国 U.K.	爱丁堡 Edinburgh	↑	93	葡萄牙 Portugal	里斯本 Lisbon	↑
19	日本 Japan	东京 Tokyo	↓	44	澳大利亚 Australia	珀斯 Perth	↑	69	越南 Vietnam	胡志明 Ho Chi Minh	↓	94	法国 France	马赛 Marseille	↑
20	德国 Germany	柏林 Berlin	↑	45	斯里兰卡 Sri Lanka	科伦坡 Colombo	↓	70	日本 Japan	大阪 Osaka	↑	95	瑞士 Switzerland	苏黎世 Zurich	↑
21	泰国 Thailand	曼谷 Bangkok	↓	46	阿联酋 UAE	阿布扎比 Abu Dhabi	↓	71	丹麦 Denmark	哥本哈根 Copenhagen	↑	96	韩国 Korea	大邱 Daegu	↑
22	印度尼西亚 Indonesia	雅加达 Jakarta	↓	47	中国 China	西安 Xi'an	↑	72	俄罗斯 Russia	伏尔加格勒 Volgograd	↑	97	中国 China	重庆 Chongqing	↓
23	匈牙利 Hungary	布达佩斯 Budapest	↓	48	俄罗斯 Russia	伊尔库茨克 Irkutsk	↑	73	俄罗斯 Russia	新西伯利亚 Novosibirsk	↑	98	意大利 Italy	佛罗伦萨 Florence	↑
24	柬埔寨 Cambodia	金边 Phnom Penh	↓	49	俄罗斯 Russia	布拉戈维申斯克 Blagoveshchensk	↑	74	俄罗斯 Russia	克拉斯诺亚尔斯克 Krasnoyarsk	↓	99	哈萨克斯坦 Kazakhstan	十月城 Kandygash	↓
25	澳大利亚 Australia	悉尼 Sydney	↑	50	新西兰 New Zealand	惠灵顿 Wellington	↑	75	瑞典 Sweden	斯德哥尔摩 Stockholm	↑	100	罗马尼亚 Romania	布加勒斯特 Bucharest	↑

注：\* 为 2022 年新增城市

Note: Cities marked with \* are new additions to the list in 2022

## 附录 3：城市列表

“一带一路”倡议下的全球城市 2022 年度报告分析了全球 516 个城市

区域	城市
美洲	埃德蒙顿、安娜堡、奥克兰（美国）、奥斯汀、巴尔的摩、巴兰基亚、巴拿马、巴西利亚、贝伦、贝洛·奥里藏特、波哥大、波士顿、波特兰、布里奇顿、布宜诺斯艾利斯、达拉斯、丹佛、底特律、蒂华纳、多伦多、菲尼克斯、费城、福塔莱萨、瓜亚基尔、哈利法克斯、哈瓦那、华盛顿、基多、加拉加斯、金斯敦、旧金山、卡尔加里、堪萨斯城、坎皮纳斯、科恰班巴、克利夫兰、魁北克、拉巴斯、拉斯维加斯、累西腓、里约热内卢、利马、罗利、罗萨里奥、罗索、洛杉矶、马那瓜、迈阿密、麦德林、梅里达、蒙得维的亚、蒙特雷、蒙特利尔、孟菲斯、明尼阿波利斯、墨西哥城、拿骚、纽约、帕拉马里博、匹兹堡、乔治敦、塞班岛、圣安东尼奥、圣保罗、圣地亚哥（古巴）、圣迭戈（美国）、圣地亚哥（智利）、圣多明各、圣何塞（哥斯达黎加）、圣何塞（美国）、圣克鲁斯、圣路易斯、圣乔治、圣萨尔瓦多、圣约翰、太子港、檀香山、坦帕、危地马拉、温哥华、渥太华、西班牙港、西雅图、辛辛那提、休斯敦、亚松森、亚特兰大、盐湖城、印第安纳波利斯、愉港、芝加哥
欧洲	阿姆斯特丹、埃因霍温、爱丁堡、安特卫普、敖德萨、奥斯陆、巴黎、巴塞罗纳、柏林、贝尔格莱德、比雷埃夫斯、比罗比詹、波德戈里察、波尔图、伯尔尼、伯明翰、布达佩斯、布加勒斯特、布拉迪斯拉发、布拉戈维申斯克、布拉格、布列斯特、布鲁塞尔、赤塔、代尔夫特、道格拉斯、地拉那、都柏林、都灵、杜塞尔多夫、法兰克福、佛罗伦萨、伏尔加格勒、符拉迪沃斯托克、哥本哈根、哥德堡、格拉斯哥、哈巴罗夫斯克、哈尔科夫、海德堡、海牙、汉堡、赫尔辛基、华沙、基辅、基希讷乌、剑桥、喀山、卡特赫纳、卡辛茨巴茨卡、考文垂、科隆、克拉斯诺亚尔斯克、雷克雅未克、里昂、里加、里斯本、利物浦、利兹、卢布尔雅那、卢森堡、鹿特丹、伦敦、罗马、罗兹、马德里、马赛、曼彻斯特、曼海姆、米兰、明斯克、莫斯科、慕尼黑、那不勒斯、尼斯、牛津、纽卡斯尔、纽伦堡、帕皮提、日内瓦、萨格勒布、萨拉热窝、圣彼得堡、圣但尼、圣赫利尔、圣皮埃尔、斯德哥尔摩、斯科普里、斯图加特、苏黎世、索菲亚、塔林、托木斯克、瓦莱塔、瓦伦西亚、威廉斯塔德、维尔纽斯、维也纳、乌苏里斯克、下诺夫哥罗德、谢菲尔德、新鲁汶、新西伯利亚、雅典、叶卡捷琳堡、叶拉布加、伊尔库茨克
亚洲	阿布扎比、阿拉木图、阿勒泰、阿什哈巴德、埃里温、艾哈迈达巴德、安卡拉、安康、安曼、奥什、澳门、巴淡岛、巴格达、巴库、巴洛达、巴士拉、白山、百色、班加罗尔、包头、宝鸡、北海、北京、贝鲁特、比什凯克、槟城、博尔塔拉、成都、崇左、春武里、达卡、达曼、大阪、大理、大连、大马士革、大邱、大田、大同、丹东、德黑兰、德宏、的黎波里（黎巴嫩）、登巴萨、迪拜、帝力、第比利斯、东莞、东京、杜尚别、多哈、防城港、费萨拉巴德、佛山、福冈、福州、釜山、高雄、古利斯丹、瓜达尔、关丹、光州、广州、贵阳、哈尔滨、哈密、海得拉巴（巴基斯坦）、海得拉巴（印度）、海法、海防、海口、汉班托塔、杭州、合肥、河内、黑河、横滨、红河、呼和浩特、呼伦贝尔、胡志明、惠州、鸡西、吉达、吉大港、吉隆坡、济南、济州、加德满都、加尔各答、加里曼丹、佳木斯、嘉峪关、江门、皎漂、金边、金华、金奈、锦州、静岡、喀布尔、喀什、卡拉奇、卡拉旺、科伦坡、科威特、克孜勒苏柯尔克孜、奎达、昆明、拉合尔、拉马拉、拉萨、拉沙卡伊、兰州、老街、丽江、利雅得、连云港、临沧、柳州、罗勇、马累、马六甲、马尼拉、马斯喀特、麦加、麦纳麦、曼德勒、曼谷、芒街、孟买、棉兰、名古屋、莫若瓦力、牡丹江、木尔坦、木姐、南昌、南京、南宁、南塔、南通、内比都、尼科西亚、宁波、阿斯塔纳、平壤、普吉岛、千叶、钦州、秦皇岛、清迈、泉州、仁川、日照、萨那、厦门、汕头、上海、深圳、沈阳、十月城、石家庄、首尔、斯里巴加湾、四平、泗水、苏库尔、苏州、塔城、塔什干、台北、太原、唐山、特拉维夫、天津、通化、同登、土库曼纳巴特、万隆、万象、威海、温州、乌兰巴托、乌兰察布、乌鲁木齐、无锡、武汉、武威、勿加泗、西安、西哈努克、西宁、西双版纳、锡林郭勒、仙台、暹粒、岷港、香港、新德里、新福、新加坡、兴安、徐州、芽庄、雅加达、亚丁、烟台、延边、扬州、仰光、耶路撒冷、伊犁、伊斯科拉、伊斯兰堡、伊斯坦布尔、伊兹密尔、银川、营口、札幌、湛江、长春、长沙、郑州、重庆、珠海、筑波
大洋洲	阿德莱德、阿洛菲、阿皮亚、阿瓦鲁阿、奥克兰（新西兰）、布里斯班、达尔文、惠灵顿、霍尼亚拉、堪培拉、莫尔斯比港、墨尔本、努库阿洛法、帕利基尔、珀斯、苏瓦、塔拉瓦、维拉港、悉尼
非洲	阿比让、阿布贾、阿达玛、阿尔及尔、阿克拉、阿斯马拉、巴马科、班吉、班珠尔、比勒陀利亚、比绍、波多诺伏、布拉柴维尔、布琼布拉、达喀尔、达累斯萨拉姆、丹吉尔、德班、的黎波里（利比亚）、杜阿拉、杜卡姆、多多马、恩贾梅纳、弗里敦、哈博罗内、哈拉雷、黑角、基加利、吉布提、金沙萨、喀土穆、卡萨布兰卡、开罗、开普敦、坎帕拉、科纳克里、科托努、拉巴特、拉各斯、莱基、利伯维尔、利隆圭、卢萨卡、路易港、罗安达、洛美、马拉博、马普托、马塞卢、蒙罗维亚、摩加迪沙、莫罗尼、姆巴巴内、内罗毕、尼亚美、努瓦克肖特、普拉亚、谦比希、圣美多、苏丹港、苏伊士、塔那那利佛、突尼斯、瓦加杜古、维多利亚、温得和克、雅温得、亚的斯亚贝巴、亚历山大、约翰内斯堡、朱巴

## APPENDIX 3: LIST OF CITIES

A total of 516 cities worldwide are analyzed in the 2022 Annual Report of Global Cities in the Vision of the Belt and Road Initiative

Region	City
America	Edmonton, Ann Arbor, Oakland(USA), Austin, Baltimore, Barranquilla, Panama, Brasilia, Belém, Belo Horizonte, Bogotá, Boston, Portland, Bridgetown, Buenos Aires, Dallas, Denver, Detroit, Tijuana, Toronto, Phoenix, Philadelphia, Fortaleza, Guayaquil, Halifax, Havana, Washington, Quito, Caracas, Kingston, San Francisco, Calgary, Kansas City, Campinas, Cochabamba, Cleveland, Quebec, La Paz, Las Vegas, Recife, Rio de Janeiro, Lima, Raleigh, Rosario, Roseau, Los Angeles, Managua, Miami, Medellín, Mérida, Montevideo, Monterrey, Montreal, Memphis, Minneapolis, Mexico City, Nassau, New York, Paramaribo, Pittsburgh, Georgetown, Saipan, San Antonio, São Paulo, Santiago (Cuba), San Diego (USA), Santiago (Chile), Santo Domingo, San José (Costa Rica), San Jose (USA), Santa Cruz, St. Louis, St. George, San Salvador, St. John, Port-au-Prince, Honolulu, Tampa, Guatemala, Vancouver, Ottawa, Port of Spain, Seattle, Cincinnati, Houston, Asunción, Atlanta, Salt Lake City, Indianapolis, Porto Alegre, Chicago
Europe	Amsterdam, Eindhoven, Edinburgh, Antwerp, Odessa, Oslo, Paris, Barcelona, Berlin, Belgrade, Piraeus, Birobidzhan, Podgorica, Porto, Bern, Birmingham, Budapest, Bucharest, Bratislava, Blagoveshchensk, Prague, Brest, Brussels, Chita, Delft, Douglas, Tirana, Dublin, Turin, Dusseldorf, Frankfurt, Florence, Volgograd, Vladivostok, Copenhagen, Gothenburg, Glasgow, Khabarovsk, Kharkiv, Heidelberg, The Hague, Hamburg, Helsinki, Warsaw, Kyiv, Chisinau, Cambridge, Kazan, Cartagena, Kazincbarcika, Coventry, Cologne, Krasnoyarsk, Reykjavik, Lyon, Riga, Lisbon, Liverpool, Leeds, Ljubljana, Luxembourg, Rotterdam, London, Rome, Lodz, Madrid, Marseille, Manchester, Mannheim, Milan, Minsk, Moscow, Munich, Naples, Nice, Oxford, Newcastle, Nuremberg, Papeete, Geneva, Zagreb, Sarajevo, Saint Petersburg, Saint Denis, Saint Helier, Saint Pierre, Stockholm, Skopje, Stuttgart, Zurich, Sofia, Tallinn, Tomsk, Valletta, Valencia, Willemstad, Vilnius, Vienna, Ussuriysk, Nizhny Novgorod, Sheffield, Louvain-la-Neuve, Novosibirsk, Athens, Yekaterinburg, Yelabuga, Irkutsk
Asia	Abu Dhabi, Almaty, Altai, Ashgabat, Yerevan, Ahmedabad, Ankara, Ankang, Amman, Osh, Macao, Batam, Baghdad, Baku, Vadodara, Basra, Baishan, Baise, Bangalore, Baotou, Baoji, Beihai, Beijing, Beirut, Bishkek, Penang, Bortala, Chengdu, Chongzuo, Chonburi, Dhaka, Dammam, Osaka, Dali, Dalian, Damascus, Daegu, Daejeon, Datong, Dandong, Tehran, Dehong, Tripoli (Lebanon), Denpasar, Dubai, Dili, Tbilisi, Dongguan, Tokyo, Dushanbe, Doha, Fangchenggang, Faisalabad, Foshan, Fukuoka, Fuzhou, Busan, Kaohsiung, Gulistan, Gwadar, Kuantan, Gwangju, Guangzhou, Guiyang, Harbin, Hami, Hyderabad (Pakistan), Hyderabad (India), Haifa, Haiphong, Haikou, Hambantota, Hangzhou, Hefei, Hanoi, Heihe, Yokohama, Honghe, Hohhot, Hulunbuir, Ho Chi Minh, Huizhou, Jixi, Jeddah, Chattogram, Kuala Lumpur, Jinan, Jeju, Kathmandu, Kolkata, Kalimantan, Jiamusi, Jiayuguan, Jiangmen, Kyaukpuyu, Phnom Penh, Jinhua, Chennai, Jinzhou, Shizuoka, Kabul, Kashgar, Karachi, Karawang, Colombo, Kuwait, Kizilsu Kyrgyz, Quetta, Kunming, Lahore, Ramallah, Lhasa, Rashakai, Lanzhou, Lào Cai, Lijiang, Riyadh, Lianyungang, Lincang, Liuzhou, Rayong, Malé, Malacca, Manila, Muscat, Mecca, Manama, Mandalay, Bangkok, Móng Cai, Mumbai, Medan, Nagoya, Morowali, Mudanjiang, Multan, Muse, Nanchang, Nanjing, Nanning, Nanta, Nantong, Naypyidaw, Nicosia, Ningbo, Astana, Pyongyang, Phuket, Chiba, Qinzhou, Qinhuangdao, Chiang Mai, Quanzhou, Incheon, Rizhao, Sana'a, Xiamen, Shantou, Shanghai, Shenzhen, Shenyang, Kandyagash, Shijiazhuang, Seoul, Bandar Seri Begawan, Siping, Surabaya, Sukkur, Suzhou, Tacheng, Tashkent, Taipei, Taiyuan, Tangshan, Tel Aviv, Tianjin, Tonghua, Dong Dang, Turkmenabat, Bandung, Vientiane, Weihai, Wenzhou, Ulan Bator, Ulanqab, Urumqi, Wuxi, Wuhan, Wuwei, Bekasi, Xi'an, Sihanoukville, Xining, Xishuangbanna, Xilingol, Sendai, Siem Reap, Da Nang, Hong Kong, New Delhi, Xinfu, Singapore, Xing'an, Xuzhou, Nha Trang, Jakarta, Aden, Yantai, Yanbian, Yangzhou, Yangon, Jerusalem, Ili, Iskra, Islamabad, Istanbul, Izmir, Yinchuan, Yingkou, Sapporo, Zhanjiang, Changchun, Changsha, Zhengzhou, Chongqing, Zhuhai, Tsukuba
Oceania	Adelaide, Alofi, Apia, Avarua, Auckland (New Zealand), Brisbane, Darwin, Wellington, Honiara, Canberra, Port Moresby, Melbourne, Nuku'alofa, Palikir, Perth, Suva, Tarawa, Port Vila, Sydney
Africa	Abidjan, Abuja, Adama, Algiers, Accra, Asmara, Bamako, Bangui, Banjul, Pretoria, Bissau, Porto-Novo, Brazzaville, Bujumbura, Dakar, Dar es Salaam, Tangier, Durban, Tripoli(Libya), Douala, Dukem, Dodoma, N'Djamena, Freetown, Gaborone, Harare, Pointe-Noire, Kigali, Djibouti, Kinshasa, Khartoum, Casablanca, Cairo, Cape Town, Kampala, Conakry, Cotonou, Rabat, Lagos, Lekki, Libreville, Lilongwe, Lusaka, Port Louis, Luanda, Lomé, Malabo, Maputo, Maseru, Monrovia, Mogadishu, Moroni, Mbabane, Nairobi, Niamey, Nouakchott, Praia, Chambishi, São Tomé, Port Sudan, Suez, Antananarivo, Tunis, Ouagadougou, Victoria, Windhoek, Yaoundé, Addis Ababa, Alexandria, Johannesburg, Juba

