

■泰德·普林斯(Ted E. Prince)

有一点已经再清楚不过:欧盟若
不至少达成一个财政联盟或一个政
治联盟(后者更有可能),就没法摆脱
严峻的财务困境。但如何让这27个
文化、语言、社会体系存在巨大差异
的国家都同意一个解决方案?西班牙
人或法国人会听从德国人的指示吗?

俗话说,阳光之下没有新鲜事。
此事已有先例,尽管发生在几百年
前。它就是“汉萨同盟”,一个城市与
商业的联盟。

汉萨同盟跨越北欧海岸,向下覆
盖低地国家和英国,东边一直到俄
罗斯。它并不能算真正意义上的先例,
因为那个时候并不存在现代意义上

而且还要成为某种类型的成员,这些
城市必须具有一定的日耳曼血统。
不仅如此,汉萨同盟还囊括了今日
北欧的大部分地区,与今日欧盟的
北部正好重合。过去与现在,有什么
共同之处?

我们可以将今日的欧盟看做是
由南、北欧洲国家组成。泛泛地说,南
欧洲国家的处境正一团糟,北欧洲国
家不这样。我们姑且可以将欧洲分为
“负责任国”和“不负责任国”两部分,
大致分别对应北部和南部国家。这种
区分现在变得有点模糊,因为法国虽
然主要是北部国家,但事实上它是
“不负责任国”。

但欧盟基本的政治问题是,“负
责任国”不想同“不负责任国”组成政

治联盟,除非后者采取前者那种负责
任的态度。反过来,“不负责任国”也
不想加入由“负责任国”主导的联盟,
除非自己不受“负责任国”一定会
加在它们身上的限制。

北部和南部欧洲的文化差异也
十分巨大。后者主要讲的是罗曼斯语
语,均来自于拉丁语系。意大利语、西
班牙语、法语和葡萄牙语十分相近,
这些国家的文化和传统及大部分历史
也很相似。

北部欧洲国家则以日耳曼语为
主,包括荷兰语、德语和英语。尽管
北欧和北部欧洲的语言基本上不
相近,但二者的文化有很大的相似
之处。德语、英语和荷兰语在金融
和经济领域占主要地位。当然,它

西班牙和葡萄牙曾向“新世界”拓展,
而没有向南部邻邦靠拢。或许这就是
今日南部欧洲国家自治愿望强烈的
原因。

北部欧洲国家要达成财政或政
治联盟,不会遇到南部国家这样大的
阻力。德国、荷兰和芬兰领导人在与
南部领导人——特别是法国领导人
——碰面时,就已经举行过会面。
他们之间似乎已经有了一种共同的
“他我之分”。

但利益的交集并不意味着北部
欧洲国家一定会达成联盟——还必
须出现与财政和经济因素相区别的
紧急因素,才能构成强烈的动机。这
个因素就是防御。

欧洲北部国家对俄罗斯存在共
同的担忧,拉脱维亚、爱沙尼亚、立
陶宛等波罗的海国家及波兰尤其
如此。截至目前,欧洲北部国家一
直处在美国“保护伞”的保护之下,
但这把“伞”正逐渐由于美国削减
国防开支而减弱。尽管北约仍在这
里发挥作用,但美国的逐步收缩只
能让这个地区的国家更依赖欧洲
自身。

当然,讨论俄罗斯的威胁不太礼
貌,毕竟“冷战”已正式宣告结束。但
欧洲人将俄罗斯视为对其安全的一个
威胁已是公开的秘密。尽管俄罗斯
目前的军事实力已经下降,但较小的
欧洲国家对其仍抱有担心。近期俄
罗斯对叙利亚政府的支持更增强了
这种忧虑。

俄罗斯有可能成为刺激北部欧
洲国家形成一个新版“汉萨同盟”
的因素,而这一次,将没有俄罗斯。近
期的叙利亚危机可能起到催化剂的
作用:叙利亚局势的发展方向与过
去的南斯拉夫战争有相似之处——
欧洲国家站在一边,另一边,俄罗斯(苏
联)支持塞尔维亚政府。

到时候可能是这样一个场景:叙
利亚内战发酵引发欧洲介入,这需
要同北约或不同北约组建一支军事
联盟。与此同时,债务危机也到了欧
元区开始分裂的地步。

在这种情况下,财政健康的欧洲
北部国家与不健康的南部国家会
出现裂痕。前者对俄罗斯普遍存在担

心,而后者没有(包括法国,因为它有
自己的核威慑力)。于是,会有一些
领导人决定将北部国家联合在一起,
并结成更紧密的军事同盟。

当然,在这个可被称作“德意志
联邦”的新同盟中,德国将是最强大
的组成部分,至少在财政上如此。但
德国可能不愿被视作联盟的领导者,
因为这样会重燃人们心中对二战的
阴影。因此,这个倡议似乎不会由
德国发起,而是由其他一个或多个
欧洲北部国家发起。波兰、芬兰和波
罗的海国家都有可能。联盟的名字也
当然不会被称作“德意志联邦”,尽
管事实更接近如此。

“德意志联邦”一旦形成,会解
决大量问题。北部国家间的经济联
盟得以保留,不会因南部国家的经
济问题而解体。美国军力抽身带来
的防御问题也会迎刃而解。新同盟
会给德国带来足够多的好处,使其
愿意在财政及更多问题上付出许多
目前在这个越来越失败的联盟中不
愿付出的代价,包括形成建立在共
同银行体系之上的财政联盟、共同
的银行存款保险计划、发行共同债
券。也就是说,这个联盟会开始在
金融机制方面与美国更接近。

这个强大的联盟从一开始就可
行。它还可以采取行动,将财政状
况逐渐出现好转的南部国家及法
国引入。在这些国家加入之前,“德
意志联邦”可以帮助它们改善自身
的财务安排与机构,还可以通过特
殊贸易安排(如自由贸易区)将它
们融入。

最重要的是,欧洲财政健康国
家的联合,可以避免欧洲经济解体。
事实上,“德意志联邦”还会为未
来欧洲经济出现复兴打下基础。该
联盟是金融一体化、财政联盟与财
富的恰当组合,能够为未来整个欧
洲形成政治联盟打下基础。

不管怎样,欧洲都会出现一个
“德意志联邦”。它的名字不会真
的叫这个,德国人也不会公开发起
这个倡议,但它确实是欧洲的结盟
尝试未来能够成功的唯一合理之
处。

(作者系佩斯领导力研究院创始人兼
总裁)
(本报记者 兰晓萌 编译)

欧洲的未来是“德意志联邦”

的“国家”,因此联盟的主要领导人
和决策者是各个城市及富裕的商人。

但汉萨同盟事实上相当于一个
欧元区。货物与服务在内部数不清
的地区和地点之间,以一种安全而且
标准化的方式交易。信不信由你,汉
萨同盟从13世纪一直持续了约400
年,到17世纪。因此,若当时可以,
现在又有何不可?

令人惊叹的是,该联盟覆盖的地
域范围广泛。参与同盟的城市从今
天的英国到比利时、荷兰,再到德
国、波兰、爱沙尼亚、拉脱维亚、立
陶宛,甚至延伸至北欧海岸的部分
俄罗斯,以及挪威和瑞典。

尽管汉萨同盟在许多方面可以
说是欧盟的前身,但它较之后者更
先进得多。它有自己的法律和防御
体系,成员之间还分布着自由贸易
区域。

汉萨同盟最有趣的一个特征
是,尽管是真正真正的多民族组合,
但其主导文化是日耳曼文化。多数
参与的城市都位于今日德国境内,



不管怎样,
欧洲都会出现一个
“德意志联邦”。
它的名字
不会真的叫这个,
德国人也不会
公开发起这个倡议。
但它确实是
欧洲的结盟尝试
未来能够成功的
唯一合理之处。

们在文化和语言上与法语并无太
多共同之处。

从这个角度看,欧盟中的北部国
家存在很多共同点,而且几百年前
还属于同一个贸易、金融、法律和防
御联盟。换句话说,对于欧洲北部
大多数国家来说,它们形成过一个
财政,甚至是政治联盟。现在只是
更新这种历史悠久的关系。

这种关系有一个共同的“黏合
剂”,那就是德国。就像日耳曼的
城市曾将“汉萨同盟”凝聚起来一
样,现代北部欧洲国家也需要德
国组成联盟,后者可作为金融的
——在一定程度上还可以作为政
治的——“黏合剂”。德国在二
战中的历史问题会让一些人犹豫,
但历史上,日耳曼的城市与文化
是让“汉萨同盟”成功延续几百
年的积极影响力。

尽管南部欧洲国家存在共同的
语言根源,但这些国家在历史上从
来没有形成过类似的“汉萨同盟”。
最接近的,也不过是中世纪威尼
斯、佛罗伦萨等意大利城邦之间的
贸易往来。

平衡与发展 可持续的中国房地产

2012博鳌房地产论坛

中国地产风尚大奖

8月8-11日 中国海南

一个放在火炉上烤的论坛

观点 地产新媒体
www.guandian.cn

博鳌房地产论坛
Since 2001
地产精英 博鳌论剑



“房地产行业不能说不美妙,
只能说是个风雨中飘摇的大
船,在海上航行着,它不会沉
没的,还要往前走。”

刘晓光
首创置业集团董事长
2011博鳌房地产论坛



“中国房地产市场就像没有边
裁,没有后卫,甚至没有门将
的球队。”

陈淮
中国城乡建设经济研究所所长
2010博鳌房地产论坛

主办: 观点地产新媒体

联合主办: 每日经济新闻、搜狐焦点、华夏时报、时代周报 首席权威主办媒体: 上海证券报社

年度品牌协办: 莱蒙国际集团有限公司 年度战略合作伙伴: 山东省文登市人民政府

品牌合作伙伴: 星月门业

首席财经网络媒体: 和讯网 首席证券网络支持: 全景网 独家财经门户网站: 金融界 海外财经媒体: 华尔街日报中文网
独家官方网络支持: 人民网房产频道 行业官方研究媒体: 中房网 首席门户网站: 腾讯房产、腾讯财经 战略合作网络媒体: 365地产家居网
主流房产门户: 在在房网 主办网络媒体: 南房网 协力研究媒体: 创富志
协办媒体: 现代快报、青岛早报、海南日报、京华时报、新闻晚报、东方早报、济南时报、宜春时报、承德晚报、东北新闻网、长江商报
合作媒体: 北京晚报、北京青年报、法制晚报、北京商报、东方早报、新民晚报、广州日报、深圳特区报、南方都市报、羊城晚报、新快报、信息时报
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贵州都市报、三亚晨报、潇湘晨报
网络支持媒体: 每经网、中国证券网、华房网、时代网、成都商报、21CN房产频道、海西房产网、0731房产网、云南房网、房掌柜
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"The United States of Germany is the Future for Europe"

Dr. E. Ted Prince
Founder and CEO
Perth Leadership Institute
www.perthleadership.org

China Times (Beijing)
June 2012

It has now become crystal clear that the EU cannot address its massive financial problems without at least a fiscal union and more probably a political union. But how do get 27 different countries with massively different cultures, languages and social systems agree on a solution? Would the Spanish or French ever agree to the Germans telling them what to do?

As they say, there's nothing new under the sun. There is a precedent, albeit several hundred years old. It's the Hanseatic League, a union of cities and companies. That's the –hansa in Lufthansa, the airline so the name has real historical meaning.

The Hanseatic League spanned the coasts of Northern Europe right from the Low Countries of Europe including the UK up to Russia. It's not an exact precedent since there were no nation-states as such in those days so the key leaders and decision-makers of the League were cities and rich merchants.

But the League was essentially its own Euro zone in which trading of goods and services across numerous regions and locations occurred in a safe and standardized way. Believe it or not the Hanseatic League lasted from the 13th to the 17th century, that is some 400 years. So if they could do it then, why can't they do it now?

The amazing and relevant thing about the Hanseatic League was the number of geographic extent of its members. Its constituent cities ranged from what is now the UK, through Belgium and the Netherlands, through Germany, Poland, Estonia, Latvia and Lithuania and parts of Russia on the Northern European coasts and including Norway and Sweden.

In many ways the Hanseatic League was the predecessor of the European Union, but arguably it was far more evolved. It had its own legal and defense systems and free trade areas amongst the members.

The most interesting feature of the Hanseatic League was that, although it was a genuine multinational endeavor, its ruling culture was Germanic. The majority of the cities that belonged were in what is now Germany and there were Germanic parentage requirements to be certain types of members. Yet, despite this, the union covered most of Northern Europe. In fact it covered what is now the northern parts of the EU. Could there be something here?

We can view the EU today as being composed of southern and northern European countries. Broadly speaking, the southern European countries are in a mess and the northern countries are not. So we can divide Europe into the "responsible" and "irresponsible" countries which roughly correspond to the northern and southern countries.

This division is a little fuzzy since France, which is mainly a northern European country, is really one of the irresponsible ones. It is joined with Hungary, and a couple of other ex-Communist countries which are going to be basket-cases for some time yet.

But the basic political problem in the EU is that the responsables don't want a political union with the irresponsibles unless the latter adopt the responsible ways of the north. Likewise the irresponsibles don't want to join a union dominated by the responsables unless they can be free to avoid the restrictions which they know the responsables will place on them

The cultural divide between northern and southern Europe is very obvious when you are there. The southern countries in the main speak the Romance languages that all came from Latin and are all very similar. Italians, Spanish, French and Portuguese all speak very similar languages, have similar cultures and traditions and share much of their historical experiences.

The northern European countries mainly speak Germanic languages which include Dutch, German, and English. While the Nordic and other northern European languages are not similar in the main, there is still a huge area of shared culture between them. And the Germans, English and Dutch are dominant in the financial and economic spheres. Of course, culturally and linguistically they don't share much with the French. Which is where a lot of the problems are coming from.

Looked at in this way, the northern countries of the EU have a huge amount in common. It's not only language and shared history. It's also a history that stretches back several hundred years which has covered unions in the areas of trade, finance, law and defense. In other words, for the majority of the northern European countries, a fiscal or even a political union has deep historical precedent and is not new; it's just a renewal of long-held ties between them.

And the common glue in this relationship is Germany. Just as Germanic cities held the Hanseatic League together, so would a modern union of the northern countries also rely on Germany as the financial and to some extent the political glue that binds them to each other.

And while there is always the issue of Germany's responsibility for World War II to give pause to some people, the fact that is that the positive influence of Germanic cities and cultures was what successfully held the Hanseatic League together for several hundred years. That's a great advertisement for a strong German role in a union of the northern European countries.

Although there are common linguistic roots in the southern European states, they never had anything like the Hanseatic League. The nearest they came to this was trade amongst the Italian city states such as Venice and Florence in medieval times. The Spanish and Portuguese reached out to the New World rather than to their southern and northern neighbors. Maybe that's why we still see today the intense need for autonomy amongst the southern States of Europe.

A fiscal or even political union of the northern Europeans wouldn't face the same obstacles compared to the southern European states. We already see the leaders of Germany, the Netherlands and Finland caucusing together before they meet the leaders of the south, and particularly French leaders. There seems to be a common "them against us" feeling amongst the northerners where the "them" is the southern European countries.

But this underlying confluence of interests doesn't necessarily mean that the northern EU countries would come together in a union. There has to be something urgent that would strongly motivate them to do that quite separate from the financial and economic factors.

There is such an issue. It's defense.

The northern countries of Europe all have a common concern about Russia. This particularly includes the Baltic states of Latvia, Estonia and Lithuania, as well as Poland. Until now the

northern Europeans have been under the US defense umbrella which has protected them. But that umbrella is gradually being taken away as the US cuts defense spending. While there still is NATO to protect them, this will have to rely more on the Europeans to fund it as the Americans gradually withdraw from their commitment to protecting Europe.

Of course it is not polite to talk about the Russian threat since officially the Cold War has ended. Russia and the West are supposed to be friends now. But it is as open secret that the biggest threat the Europeans see to their security is from Russia. Even though the Russia military is now weak it is still a threat to the smaller European countries and there is great concern about Russia amongst them. Russia's current support for Syria has led to a sudden rise in the fear of Russia by these countries.

The Russian factor is the one that has the potential to ignite the northern Europeans to form a new version of the Hanseatic League. This time it will be without the Russians. The Syrian crisis could well be the catalyst for this union. The Syrian situation is shaping up to be similar to the war in Yugoslavia in which the European states were on one side and Russia on the other supporting the Serbian government.

The scenario is this: the Syrian civil war leads to a European push to intervene in Syria. This requires a military alliance either with or without NATO. This coincides with the current financial crisis that leads the Euro zone to start coming apart.

In this circumstance the financially viable states of northern Europe split from the southern European states that are not financially viable. The northern European states have a fear of Russia which the southern states (including France because of its nuclear "force du frappe") do not share. So some leaders decide to unite the financially viable states and to link this with a closer military alliance. They already feel they need the military side to protect them against Russia. The new alliance kills two birds with one stone.

Of course, in this new alliance, which we will call the United States of Germany; Germany will be the most powerful country, at least financially. Also the Germans will not want to be seen as being the leader of the union since they will not wish to revive fears that this is just another way to dominate Europe, this time in a more subtle way than occurred during World War II.

So we can expect that the initiative will not appear to come from Germany but from one or more of the other northern European states. Poland, Finland and the Baltic states come to mind. And the union will most certainly not be called the United States of Germany, even though in practice that is what it will actually be.

The formation of the United States of Germany solves a lot of problems. It preserves an economic union of the financially viable northern European states that would otherwise fail due to the problems of the economically unviable states of Europe. It also solves a major defense dilemma for them as the US disengages from military efforts in Europe.

The new alliance offers enough advantages to Germany that it will support the union financially and it will do other things that it will not support in the current failing alliance. The things that it would support in the new alliance leading to fiscal union include a common banking system, a common bank deposit insurance scheme, and common bond issuance. In other words this union will start to resemble the US in its financial institutions.

This strong alliance will be viable at the outset. It can act to bring in the southern European states and France as they gradually put their houses in order. Even before they enter, the United States of Germany can help them improve their own financial arrangements and institutions. It can start to integrate them into the United States of Germany by special trade arrangements such as a free trade area.

More than anything, the United States of Germany, by bringing together the financially viable states of Europe can prevent the European economy from disintegrating. In fact it will underpin the future renaissance of the overall European economy by forming a strong alliance that can promote future economic prosperity in the broader Europe. The United States of Germany would have the right mix of financial integration, fiscal union and wealth to be able to form the basis for a future political union of the entire European theater.

One way or the other, we will get a United States of Germany. It won't be called that. The Germans won't openly take the initiative to do it. But that is the inexorable logic behind the only way the European experiment can be successful in the future.

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