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# 2014上海服务业

## 发展报告

2014 ANNUAL REPORT ON SHANGHAI  
SERVICE INDUSTRY DEVELOPMENT

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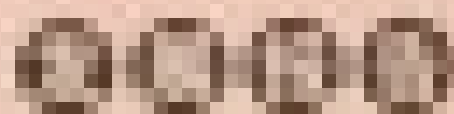
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（上海服务经济研究中心）



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# 前言

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2013 年,是全面贯彻落实党的十八届三中全会精神的开局之年,也是启动建设中国(上海)自由贸易试验区和提升上海国际贸易中心功能的重要一年。为全面反映 2013 年度上海市商务发展情况,加快推进政府职能转变和信息公开,上海市商务委员会组织编写“2014 上海商务发展系列报告”。本书作为上述系列报告之一,由上海市商务发展研究中心承担具体的编写工作,上海市商务委员会有关处室、上海各区(县)商务委员会、部分企业提供了基本素材。报告在分析 2013 年上海服务业发展状况与趋势的基础上,发布 2014 年上海推进服务业的政策支持重点,对生活性服务业、部分生产性服务业、服务业管理和创新、服务业规划布局和建设重点、上海 17 个区(县)服务业发展情况等进行了介绍。

2013 年,上海服务业发展规模进一步扩大,以服务经济为主的产业结构实现新的发展,服务业引领、拉动全市经济转型升级的作用进一步凸显。

2013 年,第三产业增加值达到 13 445.07 亿元,比上年增长 8.8%,增速分别高出第二产业和全市经济 2.7 和 1.1 个百分点。第三产业增加值占上海市生产总值的比重达到 62.2%,比上年提高 1.8 个百分点,为拉动全市经济平稳有序增长做出了重要贡献。2013 年,上海服务业不断加快转型升级步伐,内部结构更趋优化。批发和零售业增加值平稳增长,金融业、信息传输、软件和信息技术服务业等增加值继续保持两位数的

快速增长,现代服务业、战略性新兴产业也呈现了良好的发展态势。全年实现商品销售总额 6.05 万亿元,比上年增长 12.5%;关区进出口总额达 8 121.37 亿美元,占全国的比重为 19.5%;以互联网为依托的新兴贸易模式快速发展,全年实现电子商务交易额 10 560 亿元,比上年增长 35.1%;社会消费品零售总额达 8 019.05 亿元,增长 8.6%。商业对经济增长的贡献继续保持领先,全年商业税收突破 2 000 亿元,商业固定资产投资突破 450 亿元,商业实到外资突破 30 亿美元,年末全市商业从业人员突破 240 万人。2013 年,上海服务业深化改革、加强管理,发展环境不断优化。“营业税改增值税”的积极效应进一步显现,试点企业税负平均下降 40% 左右,有力促进了现代服务业发展;上海市发布《关于深化流通体制改革加快流通产业发展的实施意见》、《上海市加快流通产业发展的重点工作及分工(2013—2015 年)》、《上海市商业网点布局规划(2013—2020)公众参与草案》,完善消费政策环境,优化商业网点布局,为加快流通产业发展、扩大消费需求创造良好条件。

2014 年是全面贯彻落实党的十八届三中全会精神、全面深化改革的第一年,是实施“十二五”规划、推进创新驱动发展的关键一年。在外部经济发展环境趋于改善、宏观调控政策效应逐步显现、新一轮改革红利逐步释放以及电子商务对服务业影响日益深远的情况下,上海服务业发展进入新的战略机遇期。预计上海服务业将在新一轮制度创新、技术创新和管理创新等重大因素的驱动下进一步扩大开放、加快转型升级,产业规模和发展水平将更上一个台阶,迎来全新的发展格局。一是依托中国(上海)自由贸易试验区发展,“四个中心”建设进一步深化,金融、航运、贸易等核心功能不断拓展提升,相关服务领域对外开放度继续提高;二是以“平台经济”为引领,平台型企业快速壮大,上海服务业在全国的集聚力、辐射力、影响力将进一步扩大;三是服务业集聚区差别化、特色化发展,推动上海服务业加快转型升级;四是促进消费政策措施有序推

进,新的消费热点逐步形成,消费升级趋势延续,消费市场仍有巨大的增长空间;五是生活性服务业产业化、市场化、品牌化发展,逐步形成高效便捷的服务保障体系和管理规范的服务品质;六是生产性服务业进一步扩大服务规模,拓展服务领域,品牌化、网络化经营水平显著提高,对外辐射能力进一步增强。

2014 年上海服务业发展将以中国(上海)自由贸易试验区建设为契机,更加注重提质增效,行稳致远。全力推进自贸试验区改革创新,研究制订新版负面清单,推进服务业进一步对外开放;围绕商圈转型、企业转型和业态转型,实施商业“转型提速、竞争力提升”计划,增强商业对经济社会发展的贡献度;规范提升生活性服务业,以满足高端需求、保障基本需求、促进消费增长为目标,完善国际化大都市服务功能;聚焦与投资、贸易、流通相关的各类新技术、新业态、新模式,加快培育新的增长点;按照统一开放、竞争有序的目标,培育和发展以商品市场、生产要素市场、专业性服务市场为重点的现代市场体系。

编者

2014 年 6 月



# Preface

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2013 is the start-up year of constructing Shanghai Free Trade Zone, as well as the crucial year of promoting Shanghai's feature as an international trade center. With the development scale of service industries being further expanded and the industrial structure based on service economy achieving new development, the impact of service industry on guiding and stimulating economic transformation in Shanghai has been further highlighted. In order to fully reflect the development of Shanghai commerce and trade service industry in 2013, to accelerate transformation of government functions and to promote government information disclosure, Shanghai Municipal Government of Commercial Development arranged to compile Annual Report Series On Shanghai Commercial Development, among which this report was compiled by Shanghai Municipal Commerce Development Research Center. Based on the development and trends of Shanghai service industry in 2013, the report issues key policies in support of Shanghai Service industry in 2014, and also gives an introduction of consumes service industry, part of producer service industry, management and innovation of service industry, layout of service industry and the development of service industry in 17 Districts or Counties respectively.

In 2013, the added value of Shanghai tertiary industry rose 8.8% to 1 344.51 billion Yuan, up 2.7 and 1.1 percentage points, compared with the city's economy and the secondary industry respectively. That is to say, the added value of the tertiary industry accounted for the proportion of Shanghai's GDP reached 62.2%, which was 1.8 percentage points higher than the previous year. In 2013, Shanghai service industry has not only accelerated its development but also increased the pace of transformation and

upgrading to make the internal structure more optimized. The added value of wholesale and retail industry increased steadily, and the added value of sectors such as financial industry, information transmission and computer software service industry etc. has maintained double-digit growth level. Modern service industry and strategic new services have taken on a good trend of development. In 2013, the total sales of commodities of the whole year have reached 6 050 billion Yuan, which has increased by 12.5% over the previous year; Customs import and export volume reached \$812.14 billion, which accounted for 19.5% of the whole country; The emerging trade mode on the basis of Internet developed rapidly, with e-commerce transactions achieving 1 056 billion Yuan, which got an increase of 35.1% over the previous year. Total social retail sales of consumer goods have risen by 8.6% over the previous year to 801.91 billion Yuan. The contribution of business to economic development maintained leading position, with business tax and business fixed-asset investment breaking 200 billion and 45 billion Yuan respectively, business FDI outflows breaking \$3 billion and the number of employees in business surpassing 2.4 million.

In 2013, Shanghai service industry has intensified reform and strengthened the management, and the development environment has been continuously optimized. Positive effect of *Changing From Business Tax to Value-Added Tax* was further obvious and tax of pilot enterprises decreased by about 40% on average, promoting the development of modern service industry; Shanghai Government has issued the *Implementation Suggestions About Deepening the Reform of the Circulation System and Accelerating the Development of the circulation industry, the Key Work and Division to Accelerate the Development of the Circulation Industry* (2013—2015), and the *Draft about Public's Participating in Layout* (2013—2020) of Shanghai's *Commercial Network* to perfect the consumption policy environment, optimize the layout of commercial network and create favorable conditions for accelerating the development of circulation industry and expanding consumer demand.

2014 is the first year to comprehensively and thoroughly implement the spirit of the Third Plenary Session of the 18<sup>th</sup> National Congress of the Communist Party of China and comprehensively deepen reform, the key year of implementing the “Twelfth Five-Year Plan” and promoting innovation-driven development. Under the circumstances of external economic development environment being improved, effect of macro-control being increasingly clear, the new dividends of reform being released and the influence of e-commerce on service industry being far-reaching day by day, Shanghai service industry has entered into the fresh period of

strategic opportunities. It is expected that Shanghai service industry will be driven by new institutional innovation, technological innovation and management innovation to further expand opening up, speed up transformation and upgrading to accelerate development, scale new heights in industrial scale, structure and development level, and receive a new pattern development.

There are several reasons which contribute to the new opportunities. Firstly, based on the construction of Shanghai Free Trade Zone, “Four Centers” construction has been further strengthened, the core functions of the service industries such as finance, shipping and trade have been elevated, and the degree of openness of relative service segments has continuously increased. Secondly, led by “Platform Economics”, platform enterprises grew rapidly and aggregation, radiation and influence of Shanghai service industry in whole country will gain further expansion. Thirdly, the agglomeration of service industry has shown differentiated and characteristic development, thus promoting Shanghai service industry to speed up transformation and upgrading. Fourthly, policies to encourage consumption have been orderly pushed forward, consumption hot spots formed gradually, consumption continued upgrading, and consumer market still had plenty of room for growth. Fifthly, consumes service industry has shown industrialized, market-oriented and branding development, thus gradually forming efficient and convenient service guarantee system and management-standardized service. Sixthly, producer service industry has further expanded in size, extended service scopes, improved branding and networking management level remarkably and strengthened its external radiation ability.

It is expected that in 2014 the improvement on quality and efficiency and smooth running will be emphasized in shanghai service industry. Taking opportunity of China (Shanghai) Pilot Free Trade Zone construction, efforts will be put on formulating the Special Administrative Measures on Foreign Investment Access to the China (Shanghai) Pilot Free Trade Zone (2014) (the “Negative List”) to impel Shanghai’s Services Sector opening wider. Centering on transition of commercial district, enterprises and business model, a program focusing on speed-rising and competitiveness-enhancing will be implemented in an effort to increase the sector’s contribution to economic growth and social advancement. Besides, more attention will be paid to normalizing and promoting consumer service industry to satisfy high-end and basic demand, to promote consumption growth, and to improve the service function as an international city. Focusing on various new technologies, new formats and new modes that are

closely related to investment, trade and circulation, new economic growth points are evolving. As the goal sets, a unified, open, competitive and orderly modern market system comprising merchandise market, production factor market and professional service market is under construction.

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