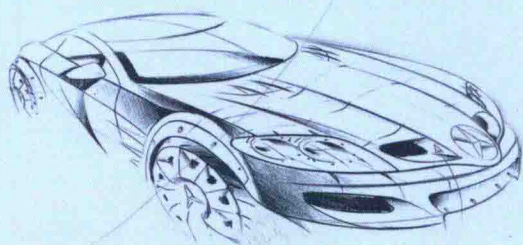


单东◎著



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MINYING QICHE

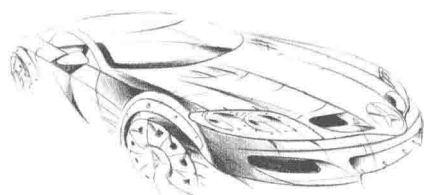
CHANYE ZHUANXING SHENGJI ZHANLUE YANJIU

浙江民营汽车 产业转型升级战略研究

本书在产业技术和组织创新的趋势；概述了中国整车调整过程及其对中国汽车产业发展的影响进行的需求及其特征，对国际金融危机形势下的汽面临的现状，对其进行了SWOT分析；对浙江民进行了比较；在对发展浙江民营汽车产业可行型升级的发展模式，并结合国际金融危机的现实，对浙江民营汽车产业发展战略的调整给出了对策性建议。



浙江工商大学出版社



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图书在版编目(CIP)数据

浙江民营汽车产业转型升级战略研究/单东著. —杭州: 浙江工商大学出版社, 2009. 10

ISBN 978-7-81140-089-2

I. 浙… II. 单… III. 汽车工业—私营企业—经济发展战略—研究—浙江省 IV. F426.471

中国版本图书馆 CIP 数据核字(2009)第 183306 号

浙江民营汽车产业转型升级战略研究

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封面设计 戴 旻

出版发行 浙江工商大学出版社

(杭州市教工路 149 号 邮政编码 310012)

(Email: zjgsupress@163.com)

(网址: <http://www.zjgsupress.com>)

电话: 0571-88823703, 88831806(传真)

排 版 杭州大漠照排印刷有限公司

印 刷 杭州恒力通印务有限公司

开 本 787mm×1092mm 1/16

印 张 19.5

字 数 237 千字

版 次 2009 年 10 月第 1 版 2009 年 10 月第 1 次印刷

书 号 ISBN 978-7-81140-089-2

定 价 49.00 元

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浙江工商大学出版社营销部邮购电话 0571-88804227

「自序」

2008年以来,由美国次贷危机引发的国际金融危机迅速向实体经济蔓延,世界经济普遍下滑,以加工型、出口型和中小企业为主的浙江经济亦受到巨大冲击。国民经济增长回落,许多传统产业出现生存危机,甚至连石化、钢铁等重工业企业也出现严重亏损,经济形势十分严峻。如何化解国际金融危机的影响,继续保持浙江经济平稳较快发展,这是浙江省委、省政府所要解决的重要课题,也是分管浙江全省工业经济的金德水副省长的重大任务。

“虽然许多产业滑坡,但其中浙江民营汽车产业还是具有发展潜力的。”这是金省长在考察全省工业经济后得出的结论。我想,此结论就是金省长思考发展民营汽车产业的现实依据和出发点。我认为,把发展民营汽车产业作为突破口,带动相关产业的发展,同时也通过汽车产业转型升级来带动其他产业的转型升级,从而提高浙江经济的竞争力,这是金省长当时的战略构想。他的这一战略构想在他2008年6月18日给我的批示函中表达得十分明确:

单东同志:

您对民营经济研究有独到见解,有影响力,也有成果。我想给您出个课题“全球化·浙江民营经济汽车产业升级的挑战、机遇、使命的对策研究”(名称可以完善,初定),汽车产业是资金、技术密集型、市场竞争激烈的成熟产业,由于其对相关产业关联性、带动性强,浙江又是整车的后起之省,零部件大省,产业链比较完整,市场主体基本上是民营企业,因

此,通过对吉利、青年、康迪整车厂以及万向等零部件企业的深入研究,可以总结该产业发展经验和教训,努力探寻产业发展规律,为产业转型升级提出重大对策措施,其成果为省政府所用,以指导我省汽车产业提升,增强竞争力,实现可持续发展,同时也可为其他产业转型升级起到借鉴作用。请酌。

金德水

08.6.18

金省长还说:“要通过汽车产业转型升级看产业升级的共性和特殊性,这个课题对发展浙江省汽车行业有重要意义,对其他产业也能起到借鉴作用。”由此可见,金省长还想通过对汽车产业的转型升级找出产业升级的一些共性和特殊性,以指导其他产业的转型升级。

我也意识到:金省长从浙江经济发展大局出发,高瞻远瞩地提出这一课题,这绝不是一般的学术课题,而是具有现实针对性和战略意义的重大课题。我感到责任重大,所以一开始不敢承担。我对金省长说:“我是搞宏观经济理论的,对汽车行业不熟悉。”金省长说:“我就是要搞宏观经济的人来研究。”金省长如此信任,我深为感动,心想:不能辜负金省长的信任,不管有多大的困难都要挺过去。在金省长的鼓励下,我斗胆挑起了这个课题的担子。

我从零开始,从《汽车构造》学起,认真阅读有关汽车产业方面的书籍;同时,广泛收集汽车产业方面的专著和资料。

2008年6月27日,应金省长之约,我到他办公室。他谈了很多发展汽车产业的问题,他从国际谈到国内,又从国内谈到浙江,从宏观谈到微观。他对大纲的主旨,重点写什么,怎么写,理论上怎么提,如何运用实证分析等都做了详尽的阐述。谈话中,他结合经济理论、管理

科学和产业经济学的知识,向我提出了这一课题研究的要求。他向我讲了 100 分钟,我听得很入迷,只是埋头快速记录,聆听他的谈话,除了钦服崇敬外,竟提不出任何异议。

我在反复学习了金省长的华翰和初步领会金省长的谈话精神后,结合自己刚学到的一点汽车产业方面的知识,拟出课题《全球化·浙江民营汽车产业升级的挑战、机遇、使命的对策研究(大纲·初稿)》,于 2008 年 7 月 14 日呈报金省长审阅。8 月 7 日,金省长在百忙中抽出时间来和我一起修改。我又一次聆听了他的指示和指导。他的指导非常细致,兹录部分可见一斑:

(一)原大纲(初稿)第一章,对国外的研究要精炼、深刻,把其中的中国发展部分要独立出来研究,包括国有的、合资的、民营的都要分别和综合研究。重点研究产业的发展历程、路径、模式和经验教训。

(二)原第二章浙江的仍保留。其中第一节,关于发展历程分为两大部分,一部分是整车,如轿车、商用车、卡车、货车、皮卡车;另一部分是零部件。发展历程要深入研究,如某阶段的迅猛发展抓住了什么机遇、有哪些突破性、里程碑式的政策,产业发展的重大事件,如吉利集团艰难曲折的发展经历。第二节,关于失败和成功都要通过案例来验证。

(三)原第二章第二节“浙江民营汽车产业发展现状”,在“现状”中要加强调查研究,贴近产业和企业,结合面临的挑战和机遇,困难和成因,用案例写,整车零部件都行。

(四)原第四章第一节“浙江民营汽车产业发展的 SWOT 分析”。SWOT 是一种简单有效的分析方法,但要结合案例来分析,要增加供应链的分析,如供应商和生产商之间的变化、企业数量变化等。要有对市场的重点分析,研究

产业链和供应链之间的关系,我省是零部件制造大省,研究零部件对市场的供应,不光对国内配套,还要对国外配套,既要有纵向分析也要有横向分析,既要有定量分析,也要有定性分析,即浙江与国内国外的对比。我们优势是什么,劣势又在哪里?国外的是整车、零部件同时发展,我们是先零部件后整车发展。改革开放后,国外零部件到中国发展,这个背景给中国汽车发展带来了机遇。随着汽车产业竞争力的提升,国内 market 需求的迅猛增加,政府和企业如何把握,需要研究制定什么政策举措,亦请一并重点予以研究。

.....

本课题研究开始后,我向他汇报请示工作,有时恰逢双休日,他都热情地给予指导。说心里话,课题的整体构思、核心思想皆出于金省长,而我只是资料的收集整理者、实地调研者,当然我也仅仅是金省长思想的挂一漏十的文字表述者。

我认为,课题的现实意义可以概括为两点:其一,在本课题的研究过程中,势必要对浙江省民营整车和零部件产业进行重点调研,运用 SWOT 分析法对浙江民营汽车产业的优势、劣势、机遇及挑战进行分析。这无论是对于省政府制定汽车产业转型升级的政策,还是对于各类汽车企业制定内部的经营管理策略,都具有重要的参考价值;其二,在本课题的研究过程中,势必要从居民消费需求结构、汽车市场供求状况以及浙江发展民营整车产业的条件三方面,对发展浙江民营整车产业的可行性进行论证,并得出浙江应把民营整车产业作为重点主导产业来发展的论断。

2008 年 7 月 23 日,我带着我的几位研究生开始对全省的重点整车和零部件企业进行调研。我们冒着酷暑到杭州、绍兴、台州、温州、金华、宁波、上海等地,走访了众多整车及零部件企业,包括吉利集团、

青年集团、康迪集团、众泰集团、万向集团、万安集团、华翔集团、瑞立集团,还有杭州市经委等,历时1个多月,在掌握了大量的第一手调研资料后,又查阅了众多的汽车产业信息,于2008年9月21日写出了《浙江省民营汽车产业升级对策研究》初稿,后又经加工,于10月12日完成第一稿,并上呈金省长。

在第一稿中,我提出浙江省应把民营整车产业作为浙江省重点主导产业来发展的论断。我从居民汽车消费需求结构、汽车市场供求状况以及浙江省本身具备的条件三个方面进行了可行性论证,而且在此基础上提出了相应的发展策略。但是,由于时间较紧,我提出的一些发展策略不够细致。

在呈上第一稿后,经过一段时间的观察,我根据经济形势的变化和国家产业政策调整的情况,对第一稿作了一系列的修改和补充,提出了一些更为细致的政策建议,写成第二稿,于2009年1月10日呈送金省长,供政府参考。

受国际金融危机影响,到2008年下半年,我国经济仍未有好转的迹象。中央看到了问题的严峻性,去年四季度以来,为应对国际金融危机,中央及时调整了宏观经济政策,其中最重要的一条是:2008年11月9日,中央把原来确定的“稳健的财政政策和从紧的货币政策”调整为“积极的财政政策和适度宽松的货币政策”,还出台了一揽子的计划和措施,国内经济环境因而得到改善。出于刺激经济的需要,中央于2008年11月1日起,由原来的降低出口退税率调整为提高出口退税率;同年11月9日提出了实施4万亿元经济刺激计划;2009年2月25日,国务院审议并通过了包括汽车产业在内的“十大产业调整和振兴规划”。国务院办公厅亦于2009年3月20日出台了《汽车产业调整和振兴规划细则》。国家发改委也由原来的严格市场准入、控制汽车生产目录、防止汽车行业产能过剩的政策转变为制定汽车产业振兴计划的促进政策,鼓励其发展。一系列宏观政策的出台,以及浙江省

委、省政府相继采取的一些重要措施,为浙江省发展民营汽车产业提供了良好的政策环境,也为浙江经济转危为机创造了条件。

当经济形势发展到这一步,课题原来以发展民营汽车产业作为浙江经济的突破口来带动相关产业发展的主旨,其现实针对性也已时过境迁。但是,究竟该如何把浙江民营汽车产业作为浙江主导产业来发展,并使之适应经济全球化,搞好转型升级,提高民营汽车产业竞争力,这仍然是一个有待探索的新课题,从这一意义上看,课题仍然具有重要价值。

在呈上第二稿后,我仍未停止对民营汽车产业的研究。在寒假至2009年3月初这一期间,我密切关注世界经济发展和汽车产业国内外的最新动态,特别关注我国产业政策的变化。我在仔细研究国家产业政策和浙江民营汽车产业发展状况后,于2009年3月16日完成第三稿。在第三稿中,在进一步细化政策建议的同时,提出了在“国际金融危机下浙江省民营汽车产业发展战略调整”的意见。

当时我想,如果金省长没有新的指示,就把第三稿作为结题稿。后又想到,今年正好是新中国60华诞。每一个爱国者都在考虑向伟大祖国母亲献礼的问题,我就想把本课题提升为专著,并定书名为《浙江民营汽车产业转型升级战略研究》,作为向祖国60华诞的献礼。

根据我原来在浙江省政府工作的经历,我知道,作为政府的课题,重要的是政策性、指导性和可操作性,关键是能解决实际问题,而专著则要求理论上的原创性和深度。要把课题升华为专著,就必须深加工。于是,今年五、六、七、八四个月,特别是七、八月的暑假时间,我全力以赴,在第三稿的基础上,根据经济政策环境的迅速变化和专著特点的要求,对各章进行了更深层次的修改,有的甚至推翻重写,并加深理论分析:第一章增写了3千余字,第三章压缩了近5千字,第四章增写了近7千字,第五章增写了3千余字,第六章压缩了近4千字,第八章增写了近3千字,第九章作了重大改动,第十章增写了近4千字;更

新了经济数据,数据采集的截止日期为2009年8月20日;对各章节在文字上的表述也进行了更为细致和准确的加工。我把一年多来的呕心沥血凝聚成这本小小的专著出版,首先,是向伟大祖国的献礼;其次,是回报金省长对我的信任;再者,也是对我自己一年多来辛勤笔耕的慰藉。

在本书撰写过程中,我体会到本课题研究有三个重点和难点。其一,在本课题研究过程中,需要对浙江民营整车产业发展历史进行回顾和总结,但浙江民营整车产业历史不长,现成资料很少。其二,在本课题研究过程中,需要考虑国际金融危机及浙江民营汽车产业的现实情况,并结合浙江省情,对浙江民营汽车产业转型升级提出对策,要真正做到这一点,难度是相当大的。其三,在本课题研究过程中,需要对浙江把民营整车产业作为重点主导产业来发展的可行性进行充分的论证。我作为汽车产业的一个地道的门外汉,虽然也想做好此项工作,但在实际运作中非常艰难,有时还感到力不从心。

一年多的“奋斗”终于过去了。课题的成果离金省长的要求还有相当差距。作为专著,虽然在课题基础上对有关章节增加了理论分析,但理论上的原创性仍感不足,学术水平也不高,这本专著就算是抛砖引玉吧。为了促进浙江民营汽车产业的进一步发展,我愿同大家一起,继续关注这方面的问题,努力在理论与实践的结合上深化这个课题。

出于对金省长的敬重,我未请金省长为这本小小专著题词或题写书名。

2009年国庆节即将来临,我谨以此书献给伟大祖国母亲60华诞,献给为振兴浙江民营汽车产业而不懈奋斗的民营企业家们!

单 东

2009.9.10

[Preface]

Since 2008, the international financial crisis triggered by the subprime mortgage crisis in the US has rapidly spread to the real economy. The world economy then experienced a common slip. Zhejiang economy which is characterized by processing enterprise, export-oriented enterprise and SMES also suffered a great shock. There is a decrease in the national economic growth rate, and many traditional industries felt hard to survive. Even in petrochemical, iron and steel, and some other heavy industries, there were also great deficit. The economic situation is very stern. How to dissolve the influences of the international financial crisis and continue to keep a sustained and rapid development is a very important task of the Provincial Party Committees and the Provincial government of Zhejiang province and of Mr. Jin Deshui, the deputy provincial governor, who is in charge of the industrial economy of Zhejiang province.

“Although there are slips in many industries, the automobile industry in Zhejiang still has a great prospect.” Mr. Jin concluded after he gave a visit to the industrial economy of the whole province. To me, this conclusion is the practical basis and the starting point of the thought into the development of the private automobile industry by Mr. Jin. It is Mr. Jin’s strategic viewpoint that we should use the automobile industry as a breaking point to

propel the development of the related industries, and to promote the transformation and upgrading of the related industries by the transformation and upgrading of the automobile industry. This strategic viewpoint has been made clear in the letter to me by Mr. Jin in June 2008.

Mr. Shan,

You have a distinctive view in the research of the private economy, and your researches are influential and fruitful. I would like to give you a topic for research, that is "Globalization. Measures research of the challenges, opportunities and tasks faced by the private automobile industry in Zhejiang in its upgrading road" (prone to adjustment). Automobile industry is a mature industry which is intensive in capital and technology, facing tough market competition. And it has a strong relevance and induced effect to the related industries. Besides, Zhejiang is a later starter in the entire car industry and a big producer of the spare parts, with a relatively complete industry chain and having private enterprises as its main part in the market. For the above reasons, it would be possible for us to conclude the development experience of the automobile industry through a deep research into the entire car enterprises like Jili, Qingnian and Kangdi and the spare parts enterprises like Wanxiang. We can strive to discover the development rules of this industry to put forward important policies and measures for its transformation

and upgrading, and the fruit could be used by the government in the guidance of the transformation and upgrading of the automobile industry in our province to enhance its competitiveness and to realize a sustainable development. Meanwhile, it can also be used as a reference for the transformation and upgrading of other industries. Please think about it.

Jin Deshui

08.6.18

Mr. Jin also said: "We should see the common and distinctive characteristics of the industrial transformation and upgrading through the automobile industry. This topic has an important meaning in the development of the automobile industry. Also, it will work as a reference to other industries." We can see that Mr. Jin also want to find the common and distinctive characteristics of industrial transformation and upgrading through the automobile industry, making which as a guidance of transformation and upgrading in other industries.

I also has the awareness that: This is by no means an ordinary academic topic but an important topic of real direction and strategic meaning, because it is through the overall economic situation of Zhejiang province and with a high and far view that Mr. Jin put forward this topic. I was at first intimidated by the great responsibility. I said to Mr. Jin: "mainly in the field of the macroeconomic theory, I am not familiar with the automobile industry." Mr. Jin said he just want a person who is in the field of

macroeconomics to do the research. Deeply moved by his trust, I told myself that I should not let Mr. Jin down. No matter what difficulties there would be, I will finish it. Under the encouragement of Mr. Jin, I took up the topic.

Starting from scratch, I first learned the “structure of automobile”, and read books about automobile industry carefully. Meanwhile, I collected the books and some documents about the automobile industry.

On June 27th, 2008, under the invitation of Mr. Jin, I came to his office. He talked a lot about the problems in the development of the automobile industry, from international situation to that of our own nation, from the nation at large to Zhejiang, from macro to micro. He gave a specific explanation about the theme, about the main point, about how to write it, how to put forward the theory and how to use empirical analysis. In the talk, he expounded to me the research requirements of this topic by integrating the knowledge of the economic theories, management science and industrial economics. Within 100 minutes, I could not even think up one disagreement except being absorbed by his talk and engrossed in the note-taking.

After repetitive study of Mr. Jin's work and having an initial understanding of his talk, by integrating the basic knowledge about the automobile industry I have just learned, I drafted out the topic “Globalization. Policy analysis of the challenges, opportunities and tasks in the upgrading of Zhejiang private automobile industry” (first draft), which had been put to Mr. Jin to review on July 14th, 2008. On August 7, Mr. Jin took time from his busy schedule to

revise the draft with me. Again, I avail myself of the opportunity to listening to his instruction and direction. His guidance is very careful which can be seen from the following quotations.

(I) In chapter 1 of the original version(first draft), the research on the foreign part should be refined and deep. An independent chapter should be used to state that of our own country, including state-owned enterprises, joint ventures, and privately operated enterprises, which all need to be researched respectively and comprehensively. Besides, attention should be given to their development courses, routes, patterns and their experience and lessons.

(II) The original chapter 2 about Zhejiang should be retained. Section I about the development course can be divided into two parts; one is the entire car, such as cars, commercial vehicles, trucks, lorry, and pick-up trucks. The other part is spare parts. We should give a deep statement about its development course, especially some great opportunities, breaking-through policies, milestone-like policies and some great events in the enterprises during the stages of rapid development, taking the struggling and tortuous development road of Jili Group as an example. Both failures and successes should be exemplified by cases in the second part of chapter 2.

(III) As to current situation of private automobile industry in Zhejiang in section II of chapter 2, we should do more research by contacting closer to the enterprises an

industries. Examples of the entire cars industry and spare parts industry can be used to write about this part by integrating the current challenges and opportunities, difficulties and cause-and-effects.

(IV) The section 1 of original chapter 4 is about the SWOT Analysis of private automobile industrial in Zhejiang. SWOT is a simple and effective analytical method, which need to integrate with cases. We need to add more analysis of the supply chain, like the change between the suppliers and manufacturers, and the change in the number of enterprises. The importance should be attached to the market to research the relationship between the industrial chain and supply chain. As a big province in producing spare parts, research on the supply of spare parts in the market should include not only the homeland, but also the foreign market. By comparison between Zhejiang and home and aboard through horizontal analysis, vertical analysis, quantity analysis and quality analysis, we can find where our strengths and weaknesses are. With contrast to the foreign countries, which developed the entire car and the spare parts at the same time, we developed the spare parts first and then the entire car. After the reform and opening up, foreign spare parts industry developed into China, which, as a backdrop, brought great opportunities to the development of China's automobile industry. As the sharpening of the competitiveness of the automobile industry, the rapid

increase of demand in the domestic market, please give a careful research on how government and enterprises seize the opportunities and what policies and measures we should formulate.

After the beginning of this Research Project, when I reported to him and asked for instructions about the work, he enthusiastically gave guidance even though on the weekend. To be honest, almost all the ideas and thoughts are originated from Mr. Jin, and I am just a data gatherer and investigator. Of course, I am also an expresser who can just catch a little of the points of Mr. Jin.

In my opinion, the realistic meaning of this topic can be divided into two parts briefly. First, it is necessary to investigate private entire cars and spare parts industry during this research, and use the SWOT analysis to analyze the advantages, weakness, opportunities and challenges of private automobile industry in Zhejiang. It has very important referential meaning for policies of transformation and upgrading of private automobile industry in Zhejiang, and also for strategy of inner control for all kinds of automobile companies. Secondly, we have to argue whether it is feasible to develop entire car industry in Zhejiang from three points, that is, demand situation, the relationship between supply and demand, and the advantages to develop private automobile industry in Zhejiang. Then we can get a conclusion that we should take private automobile industry as the key leading industry in Zhejiang.

On July 23rd, 2008, I begin to make investigation in key entire