



新兴经济体蓝皮书®

LUE BOOK OF EMERGING ECONOMY

金砖国家发展报告 (2013)

转型与崛起

ANNUAL REPORT ON BRICS DEVELOPMENT (2013)

顾问/李 扬 高 翔 裴长洪 汪 戎 张宇燕 郑秉文

主 编/林跃勤 周 文

副主编/刘文革



社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

2013
版

013029273

F11
101
2013



金砖国家发展报告 (2013)

ANNUAL REPORT ON BRICS DEVELOPMENT
(2013)



转型与崛起

顾问 / 李 扬 高 翔 裴长洪 汪 戎 张宇燕 郑秉文

主 编 / 林跃勤 周 文

副主编 / 刘文革



社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)



北航

C1638233

F11
101
2013

图书在版编目(CIP)数据

金砖国家发展报告. 2013: 转型与崛起/林跃勤, 周文主编. —北京: 社会科学文献出版社, 2013. 3

(新兴经济体蓝皮书)

ISBN 978 - 7 - 5097 - 4409 - 3

I. ①金… II. ①林… ②周… III. ①世界经济 - 经济发展 - 研究报告 - 2012 ②社会发展 - 研究报告 - 世界 - 2012 IV. ①F11

中国版本图书馆 CIP 数据核字 (2013) 第 050203 号

新兴经济体蓝皮书

金砖国家发展报告 (2013)

——转型与崛起

主 编 / 林跃勤 周 文

副 主 编 / 刘文革

出 版 人 / 谢寿光

出 版 者 / 社会科学文献出版社

地 址 / 北京市西城区北三环中路甲 29 号院 3 号楼华龙大厦

邮政编码 / 100029

责任部门 / 经济与管理出版中心 (010) 59367226

电子信箱 / caijingbu@ssap.cn

项目统筹 / 高 雁

经 销 / 社会科学文献出版社市场营销中心 (010) 59367081 59367089

读者服务 / 读者服务中心 (010) 59367028

责任编辑 / 高 雁 陈凤玲

责任校对 / 李有江

责任印制 / 岳 阳

印 装 / 北京季蜂印刷有限公司

开 本 / 787mm × 1092mm 1/16

版 次 / 2013 年 3 月第 1 版

印 次 / 2013 年 3 月第 1 次印刷


书 号 / ISBN 978 - 7 - 5097 - 4409 - 3

定 价 / 69.00 元

印 张 / 16.75

字 数 / 271 千字

本书如有破损、缺页、装订错误, 请与本社读者服务中心联系更换

 版权所有 翻印必究

新兴经济体蓝皮书编委会

主 编 林跃勤 周 文

副 主 编 刘文革

编 委 会 (以姓氏拼音排序)

A. E. Abdenur	蔡春林	C. Horne	陈万灵
曹莹莹	刘文革	刘 叶	李永刚
林跃勤	Mihaier Yu. Golovnin		文富德
万 军	杨宝荣	张 兵	周 文

The Editorial Committee of “Blue Book of Emerging Economy”

Chief Editor Lin Yueqin Zhou Wen

Deputy Editor Liu Wenge

Editorial Committee

A. E. Abdenur	Cai Chunlin	C. Horne	Chen Wanling
Cao Yingying	Liu Wenge	Liu Ye	Li Yonggang
Lin Yueqin	Mihaier Yu. Golovnin		Wen Fude
Wan Jun	Yang Baorong		Zhang Bing
Zhou Wen			

主要编撰者简介

林跃勤 湖南人，经济学博士，俄罗斯国立圣彼得堡大学毕业。现任中国社会科学杂志社责任编审。主要学术兼职有：中国社会科学院经济所经济发展与转型研究中心副秘书长、新兴经济体研究会副秘书长、中国发展战略学研究会经济发展专业委员会副主任。近年主持完成国家社会科学基金项目、中国社会科学院国情调研项目、中纪委委托课题、人事部等课题多项，同时参与国家社科基金重大招标课题等多项。主编《金砖国家发展报告》《中国经济发展战略》等著作，在国内外多种学术刊物发表论文数十篇。主要研究方向：国际经济、转型经济。

周文 重庆人，经济学博士、教授。现为云南财经大学科研处处长。中国人民大学新兴经济发展研究中心副主任（兼职）、中国社会科学院经济研究所经济发展与转型研究中心副秘书长（兼职）、新兴经济体研究会常务理事、世界政治经济学会常务理事、中国经济规律研究会常务理事、中华外国经济学说研究会理事、世界经济学会理事、中国青年政治经济学学者年会首届执行主席、全国马列主义经济思想史学会理事、云南省委领导联系专家、云南省学术技术带头人。主要研究领域为制度经济学、政治经济学、发展经济学、经济社会学等。先后在国内重要学术期刊《中国社会科学》、《中国社会科学内部文稿》、《经济研究》、《管理世界》、《经济学动态》、《财贸经济》、《马克思主义研究》、《经济理论与经济管理》、《光明日报》（理论版）、《政治经济学评论》、《教学与研究》等杂志或报纸上发表论文100多篇，10多篇被《新华文摘》《中国社会科学文摘》《中国人民大学复印资料》《经济研究参考》等转载或摘刊。主要著作：《分工、信任与企业成长》、《中国经济改革与中国经济学》、《外国经济学说与中国改革》（副主编）、《中国经济改革与发展》、《金砖国家发展报告》（主编）、《中国产权市场报告》（副主编）等。2012年获世界政治经济学杰出成就奖。

刘文革 黑龙江人。教授，博士。2008 年入选教育部新世纪优秀人才、北京市宣传系统“四个一批”人才。2000 年在吉林大学获得世界经济博士学位，其后又在辽宁大学、中央财经大学从事博士后科研工作，现为浙江工商大学特聘教授。长期致力于转型经济、经济体制的比较制度分析、中国宏观经济等领域的研究，尤其对转型国家改革与发展模式比较、金砖国家经济发展与经贸合作等方面长期进行理论跟踪和研究，取得了丰硕成果。主要学术兼职：中国经济发展研究会常务理事、中国世界经济学会团体会员负责人、中国数量经济学会理事等。已出版专著 3 部，在《经济研究》《管理世界》《世界经济》《经济学动态》等国家级杂志上发表多篇论文，被《中国社会科学文摘》《高校学报文摘》等转载 10 余篇。主持国家社科基金、国家自然科学基金、教育部社科基金等课题多项。获 3 项省部级科研奖励。

Main Lexicographer Profile

Lin Yueqin Born in Hunan and graduated from Russian Saint Petersburg State University with Ph. D. in Economics, is now executive editor of Chinese Social Science Magazine and concurrently deputy secretary general of Economic Transition and Development Center in Economic Research Institute of Chinese Academy of Social Science (CASS), deputy secretary general of Research Association of Emerging Economies and deputy director of Economic Development Strategy Committee in China Strategy Research Board. In recent years, Lin has directed and completed several research projects such as the project of the National Social Science Fund, the national research project of the CASS, the projects authorized by the Commission for Discipline Inspection of the Central Committee of the CPC and the Ministry of Personnel, etc. , while attending several significant tender projects of the National Social Science Fund, etc. , acted as chief editor of *Annual Report on BRICS Development*, *China's Economic Development Strategy*, etc. , and published over decades of essays in various domestic and foreign academic journals. Major field: international economy and transitional economy. Contact email: terlin@126.com.

Zhou Wen Born in Chongqing, a professor of economics with Ph. D. in Economics at Yunnan University of Finance and Economics and concurrently deputy director of Emerging Economic Development Research Center of Renmin University of China, deputy secretary general of Economic Transition and Development Center in Economic Research Institute of Chinese Academy of Social Science (CASS), executive director of Research Association of Emerging Economies, executive director of the World Association for Political Economy, executive director of Chinese Economic Laws Research Academy, director of Chinese Research Association of Foreign Economics, director of the Institute for International Economics, executive president of the first Youth Annual Meeting of Political Economics, director of Research Association of the History of Marxism-Leninism

Economic Thoughts in China, Yunnan Provincial Party Committee Leadership Expert and academic technology leading figure in Yunnan Province. Major field: institutional economics, political economics, development economics, economic sociology, etc. . He has successively published more than 100 academic articles in domestic and foreign academic journals and papers such as *Chinese Social Science*, *Internal Documents of Chinese Social Science*, *Economic Research*, *Management World*, *Economic Perspectives*, *Finance and Trade Economics*, *Studies on Marxism*, *Economic Theory and Economic Management*, *Guangming Daily* (theory edition), *Review of Political Economy*, *Teaching and Research*, etc. , of which over 10 were reprinted or abstracted by *Xinhua Digest*, *China Social Sciences Digest*, *Publication Photocopying Materials of Renmin University*, *Economic Research Reference*, etc. . Main works: *Division of Labor*, *Trust and Enterprise Growth*, *China's Economic Reform and China Economics*, *Foreign Economic Theory and China's Reform* (subeditor), *China's Economic Reform and Development*, *Report on BRICS' Economic and Social Development* (chief editor), *China Property Market Report* (subeditor), etc. He won the world political economics outstanding achievement award in 2012.

Liu Wenge Born in November 1966 in Heilongjiang province, has the title and degree of professor, Ph. D. and post-doctor. He was elected as a new century outstanding figure of the Ministry of Education and Beijing Publicity Department Talent Award in 2008. After obtaining his doctor's degree in world economy at Jilin University, he was engaged in postdoctoral research at Liaoning University and Central University of Finance and Economics. He is now a specially-appointed professor at Zhejiang Gongshang University. With his long-time engagement in comparative institutional analysis of economic transition and economic system, research on China's macroeconomy, etc. , especially comparison of the reform and development mode of a transition country as well as theoretical track and study of the BRICS' economic development, economic and trade cooperation, etc. , he has achieved fruitful results. Main academic part-time: executive director of Research Association of Chinese Economic Development, responsible person of Chinese Society of World Economics Group Membership, director of Chinese Association of Quantitative Economics, etc. . He has published 3 scholarly monographs and many

research papers in the state-level journals such as *Economic Research*, *Management World*, *World Economy*, *Dynamic Economics*, etc. , of which about 10 were reprinted by *China Social Sciences Digest*, *University Journal Abstracts*, etc. . He's also presided over a number of national research projects of the National Social Science Fund, the National Natural Science Fund, the Social Science Fund of the Ministry of Education, etc. . He won 3 scientific research awards at ministry and provincial-level.

摘 要

金砖国家现在怎么样？这是当下都感兴趣的热点话题。2012 年是金砖国家自被称为一个集团或者同一类经济体以来的第十一年。官方的统计数据显示，五国的主要指标普遍较上年逊色。总体上金砖国家的增长速度在近一年里下降了 20%，个别国家下降了 50% 以上。回想到几年前金砖国家经济增长的出色表现，如今的落差可谓相当巨大。学术界对金砖国家的增长质量、动力源泉和可持续性出现了普遍的质疑之音。尤其是西方学者更是直言不讳，断言“金砖”金色不再，破产在即。一改以往的吹捧溢美之词，唱衰之声不绝于耳。就连“金砖”一词的发明者，吉姆·奥尼尔及其团队也对金砖国家的发展提出疑问，并开始移情别恋，出版世界新的增长图谱将印度尼西亚、韩国、墨西哥、土耳其、尼日利亚等近年增长较快的国家提拔到与金砖国家并列的地位，并认为后者有超越之势。

一些较为理性的研究成果则对金砖国家出现减速和掉色的现象进行各种剖析。力图回答金砖国家为什么褪色。在各种解读之中，最主流的看法无外乎是后金融危机时期国际经济依然没有走出危机的阴影，尤其是欧元区经济衰退，对金砖国家出口和吸引外资等造成冲击，进而影响到这些国家的经济增长。因为这些国家主要还是与美欧发达国家进行贸易往来，外资主要来源也是美欧国家，外部需求减缓导致中国加工出口增长降速，出现净出口对经济增长的负贡献，矿产品价格和需求下跌对巴西和南非经济增长、服务外包需求增长减缓等对印度经济增长、国际油价的平稳对俄罗斯经济增长引擎的运转等均有不同程度的不利影响。这是金砖国家与世界经济同步波动的外部因素。但是，更主要的还是金砖国家的经济增长有自身的脆弱性和不合理性，如增长动力较为单一和原始，金砖国家主要还是依托禀赋资源比较优势来谋取增长，如中国主要依托高投资、基础建设、房地产、劳动密集型低附加值加工出口收入等，而俄罗



斯、南非和巴西则主要依托资源产品出口收入，印度则依托软件出口和服务外包收入及劳动密集型低技术制造品出口等驱动经济，均非依靠技术创新和高新产品、高附加值产品开发及出口来获得经济红利，也不像日本那样通过大量的海外投资收益来繁荣经济。而且，这些国家的居民消费能力依然较弱，尤其是中国和印度这两个人口大国，中产阶级队伍依旧较弱，整体上消费占比还达不到全球平均水平，内生增长力不够强，无法弥补外部需求削减带来的冲击。金砖国家这类初级型经济在国际价值分工中的“打工者”地位没有改变，在西方市场繁荣的条件下，这些国家的产品需求大，就业好，开工足，投资兴旺，居民消费也较快增长，驱动着高增长率。当外部市场行情不好时，这些国家的产品竞争力和出口增长下降，出口、就业、居民收入、财税收入、国际收支平衡、货币币值、消费品价格等均出现恶化，自然出现经济增长减缓或停滞的现象。2012年的经济变化表明，金砖国家的经济稳健性比美国和日本要弱，2012年美日经济均逆势而上，稳定恢复增长，说明其抗外部波动能力较强。因此，增长动力初级和单一，增长转型缓慢、创新能力与国际竞争力不强等是金砖国家经济增长下滑、金色变暗的根本原因。

金砖国家怎么办？面对内外环境变化以及种种难题，金砖国家如何克服挑战、稳定增长，续写昨日的辉煌，走向崛起？金砖各国都意识到自身的经济难题和短板，均出台新的发展战略规划和政策，但如何付诸实施，加快增长转型、促进赶超发展的目标，变数不少，难度很大。这也是本报告重点探讨的问题。

还有一个问题也是值得关注，就是金砖国家的明天会如何？乐观者认为其崛起大势不会改变，金砖国家前景光明；而悲观的和负面的预测也不少。如何以客观、全面、公正和前瞻性的眼光审视金砖国家发展的未来，并得出能被时间检验的预测前景，也是考验研究者务真严谨探索精神的标杆。

围绕学界和普遍关注和亟待解答的问题，来自中国、俄罗斯、巴西和美国的诸位作者通过总报告、国别报告和专题报告的形式力图对金砖国家近期的发展变化、特点及其来龙去脉、未来发展转型与走向等进行详细的观察和深入的思考，和大家一起分享金砖国家的成长过程以及成长的烦恼、稳健成长的历程。各位作者分别对金砖国家发展与转型的总体态势进行了综合评析和展望；



对金砖各国 2012 年的经济发展及其特点进行了总结回顾并对 2013 年及未来的发展前景进行了预测；还就金砖国家发展机遇与挑战、产业发展与合作、对外贸易、金融合作、贸易便利化措施、与国际组织的互动合作以及西方学术界对金砖国家的评价进行了描述和分析。此外，还将 2012 年金砖国家之间的主要合作交往事件进行了梳理。

具体的，总报告《金砖国家：增长转型与持续发展》分析了金砖国家 2012 年整体经济表现的基本特点是比上年逊色不少，增长率同比下降 20% 左右，但依然是世界经济增长的亮点和主要引擎，整体崛起态势并未逆转，只是有所减缓，并不能仅凭 2012 年的表现否定整个金砖的金色调。但也说明金砖国家的赶超并非直线前行，而是曲折的，需要这些经济体不断思索、调整发展战略和政策，加快转型、探索新的增长动力和赶超路径。文章探讨了金砖国家转型创新发展的路径和方法，并在对金砖国家近中期和远期增长前景的主流预测进行评述的基础上提出了自己的看法。

国别报告共包含金砖五国 2012 年经济回顾与 2013 年发展展望、分析，共 5 篇。

《2012 年巴西经济发展回顾与 2013 年展望》回顾了 2012 年巴西经济与社会发展的基本特点是好坏兼有。经济增长率下降，通货膨胀率上升，投资及产业结构表现不佳，原因主要是外部环境恶化，干旱导致农作物歉收，但服务业发展相对较好，社会不平等降低，居民对生活的满意度与政府的支持率反而上升。未来，巴西经济要走上复苏、较快增长之路，政府需要扩大抗击贫困、减少腐败以及进一步促进社会包容性发展、改善教育和卫生等公共服务质量，有效管理和扩大投资的路线。

《2012 年俄罗斯经济发展回顾与 2013 年展望》详细总结了 2012 年俄罗斯的经济表现、宏观经济增长、消费价格、对外经贸、汇率变动以及财政、货币政策等，分析了 2012 年俄罗斯经济总体表现欠佳的内外条件，并对 2013 年俄罗斯经济转型的政策前景进行了展望。

《2012 年印度经济发展回顾与 2013 年展望》在对印度独立以来的经济社会发展进行简要回顾的基础上详细剖析了 2012 年印度经济增长的表现、改革举措、成效及存在的问题，并对 2012 年印度改革转型与其他金砖国家进行了



比较,对2013年及更长时期的增长转型主要政策形状与发展前景进行了展望。

《2012年中国经济增长与转型回顾和2013年展望》分析了2012年中国面对复杂严峻的国内外经济形势为稳定经济采取积极的财政政策和稳健的货币政策以及致力转型创新,实现经济增长筑底企稳、回升向好的格局:消费、投资、出口拉动经济增长的协调性有所增强;三次产业推动经济增长的协同性有所提高;改革创新对经济增长的驱动力日益显著。对2013年中国经济发展趋势提出的预测认为,中国经济增长在进一步企稳回升的同时,经济增长转型升级也将得到进一步推进。

《2012年南非经济社会发展转型总结与2013年展望》分析了近期南非转型与发展方面的新政策及其取得的成就,并分析了南非较为典型的社会经济二元特征、继续推进经济与社会转型、实现包容性增长所面临重大的挑战,以及执政党自身角色转换的困境。

第三部分即专题报告,共包含7个分报告,主要从产业发展、金融、外贸、国际合作等几个主要领域对金砖国家的改革发展进行比较分析。

《金砖国家经济形势及其持续发展面临的挑战》对金砖五国2012年的经济增长情况、基本特点进行了翔实的评析,对金砖国家未来经济持续稳定增长所面临的挑战和困境做了深入研究,并对这些经济体应对挑战维持经济持续发展的政策选择进行了理性思考。

《金砖国家产业发展与产业合作》指出,金砖国家快速的经济增长推动了产业的迅速成长,使金砖国家的产业发展呈现新的特征:各国正在加大对新兴产业的布局,产业升级的趋势日益明显。但新工业革命可能加大金砖国家与发达经济体之间的技术落差,发达国家的制造业回流使金砖国家的产业升级模式面临挑战,成本上升也使得金砖国家制造业的竞争优势遭到削弱。金砖国家要想保持产业竞争力,并实现向全球价值链高端的跃迁,在增加研发强度,推进技术创新的同时,有必要加强金砖国家框架内的产业合作,实现优势互补,合作共赢。

《金砖五国金融合作机制研究》指出,发达国家为主导的国际金融体系存在着严重弊端,金融危机频发对金砖国家的金融正常运转、金融效率和经济稳健发展形成重大遏制。要打破不合理的全球金融体系,金砖五国应加强在国际



金融领域的合作,以提升各国防范金融风险、应对金融危机的能力。本文充分论证了金砖五国开展金融合作的必要性与可能性,并提出了实施金砖国家金融合作的具体对策建议。

《金砖国家经贸与投资合作的新态势与新特点》分析了金砖国家经济结构互补性、经贸合作机会及近年来的金砖国家对外贸易增长、吸引外资及对外投资的变化情况,对金砖国家间经贸合作、相互投资发展的新领域、新进展进行了总结,还肯定了俄罗斯加入世界贸易组织对俄罗斯发展对外经贸关系及深化金砖国家经贸与投资合作的意义。

《金砖国家贸易便利化研究》指出,随着金砖国家合作的不断深入,金砖国家间贸易的紧密度在日益增加,如何在保持金砖国家各国竞争力的同时,促进相互间的贸易发展,深化经贸合作,成为值得思考的问题。本文从贸易便利化的角度,在分析金砖国家贸易合作现状的基础上,分析比较金砖国家目前贸易便利化的措施与程度,并据此提出促进金砖国家贸易便利化的政策建议。

《金砖国家与国际组织的合作及推动全球治理变革》通过简要分析 WTO、IMF、世界银行等全球治理机制和框架,指出全球贸易治理效率需要继续提升、IMF 在全球经济治理中的合法地位和代表性需要加强、世界银行在全球经济治理中作用需要强化,同时, G20 也面临转型压力。为此,本文建议金砖国家进一步参与推动全球经济治理变革,促使全球治理变革的方向是建立以发展为导向的全球治理机制和全球治理变革的速度模式以“循序快进”方式进行,共同提升议题设定能力,重点通过 G20 机制助推全球经济治理变革。

《西方学术界如何看待金砖国家》对近年西方学术界从经济学、法律、能源、国际关系思想四个层面就金砖国家的长处和弱点、作为一个实体的共同性、整体潜力、组织有效性、与国际货币基金组织、世界银行、美国以及欧洲主导的多边机构的关系等问题发表的评价进行了扫描,为人们认识金砖国家、金砖现象提供一个复杂的而矛盾的视角。

林跃勤

Abstract

How are the BRICS countries right now? This is a hot topic really interested by people at this moment. The year of 2012 was the 11th year that BRICS countries were called a Group, or the same category of economies. The official data shows that the major indicators of these five countries in 2012 are generally inferior to those of the previous year. As a whole, the growth rate of BRICS countries declined by 20% in this year and some countries even have experienced a 50% drop. Thinking back to a few years ago, the outstanding growth of BRICS countries are certainly in contrast with their current economic situations. Academia has questioned the growth level, driving force and sustainability of the growth in BRICS countries. In particular, Western scholars have asserted that the BRICS no longer exist and will go bankrupt soon, contradicting their glowing praise toward BRICS' development in the past. Even the inventor of the term of BRIC, Jim O'Neil, and his team have doubted the current development of BRICS countries. They have published the world's new growth atlas and regarded Indonesia, Korea, Mexico, Turkey, Nigeria, all of which have seen rapid growth rate in recent years, as in a parallel position to the BRICS countries. They insisted that these countries will surpass BRICS countries in the future.

Some more rational studies have sought to find reasons for the BRICS countries decelerating their growth. Among the various interpretations, the mainstream is believed that the international economy has not recovered from the financial crisis. In particular, the economic recession in the Euro zone has exerted a negative influence in exports and foreign investment, and has further hindered the economic growth of the BRICS countries. Developed countries such as the United States and the European countries are the main traders and main source of foreign capital to BRICS countries. Decreasing external demand has lead to the drop of export processing growth in China and made negative contributions of net exports to the economic growth. The operation of economic the growth engine in these countries has been adversely affected in varying degrees; not only the decline of mineral prices and the



demand thereof hampered the economies of Brazil and South Africa and the slowdown of service outsourcing demands curtailed growth in India, but also the steady decline of international oil prices has adversely affected Russia. These are the external factors for BRICS countries synchronously fluctuating with the world economy. However, the main internal reason is the vulnerability and irrationality of the economic growth pattern in BRICS countries. For instance, the growth momentum is single and raw and BRICS countries mainly rely on the comparative advantage of the endowments to drive growth. China relies on high investment, infrastructure, real estate, and export revenues of labor-intensive and low-value-added processing. Russia, South Africa and Brazil mainly rely on the income of resource exports, and India depends on software exports, the income of service outsourcing, and exports of labor-intensive and low-technology of manufacturing goods. None of BRICS countries rely on technological innovation, high-tech products and the development and exports of high value-added products to get economic dividends like Japan to gain economic prosperity through a large number of overseas investment returns. Moreover, the power of household consumption is still weak in BRICS countries, especially China and India. As the two most populous countries, the middle class in both China and India is relatively weak and their overall consumption cannot reach the global average level. Their endogenous growth is not strong enough and cannot make up for the shocks brought with external demands. As such primary-based economic patterns, BRICS countries' position in the international value division has not changed. Only under prosperous conditions in Western markets will demand for BRICS countries manufactures and resources be huge and enable them to experience high employment, investment, household consumption and growth rates. On the contrary, they will lose their competitiveness if the product market and export growth declines; exports, employment, resident income, tax revenue, balance of international payment, currency value and consumer price will all deteriorate. The economy will slowed down or even stagnate. The economic changes in 2012 indicated that the economic soundness of BRICS countries is much weaker than the United States and Japan. In 2012, the economy in both the United States and Japan returned to steady growth, which demonstrating the strength of their resistance to external forces. Therefore, the singularity of growth momentum, slow growth transformation, and weaker innovation capacity and international competitiveness are



the fundamental reasons leading to the decline of economic growth in BRICS countries.

So what should the BRICS countries do? In order to cope with changes in the internal and external environment and various issues, what should BRICS countries do to overcome challenges, and steady growth, relive yesterday's glory and continue rising abruptly? All BRICS countries have realized their own economic problems and disadvantages and issued new strategic plans and policies for future development. But how should BRICS countries do to put policies into practice, accelerate growth transition and achieve catch-up development targets? The variation in the development of BRICS countries is large and further promoting the growth in BRICS countries is difficult. This is also the central issue of this report.

Another issue that the public is really concerned is that how the BRICS countries will be in the future. Optimistic and active people think that BRICS countries will rise and all of these countries will have a bright future; but pessimistic and negative predictions toward the fate of the BRICS countries are rampant as well. How to examine the future development of BRICS countries from an objective, comprehensive, fair and forward-looking perspective, and come to a time-tested conclusion will be the benchmark for testing researchers' rigorous spirit of exploration.

Around the above issues, writers from China, Russia, Brazil and the United States try to analyze the current development changes, characteristics, circumstances and future development transformation of the BRICS countries through detailed observation and in-depth thinking. By the general report, country report and thematic report, they will share the development history, growing pains and the exploration of steady growth in BRICS countries. Writers make a comprehensive analysis and outlook of the development and transformation in BRICS countries; they review the economic development and characteristics in 2012 and forecast the BRICS countries' future development in 2013; they give detailed descriptions and analyses of the BRICS countries' opportunities and challenges, industrial development and cooperation, foreign trade, financial cooperation, trade facilitation measures, interaction and cooperation with international organizations, and evaluations from Western academia; furthermore, they also list the main events of cooperation and exchange among BRICS countries in 2012.

Specifically, the general report "BRICS Countries: Growth Transformation and