

普通高等教育“十二五”
高职高专规划教材



21 世纪高等职业教育财经类规划教材

经 济 贸 易 类

国际贸易 理论与实务 (双语版)

拜文汇 郑美花 ◎ 主编



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*International Trade
Theory & Practice
(English & Chinese)*



人民邮电出版社
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内 容 提 要

教材内容包括两部分：第一部分为绪论，简单介绍国际贸易原理和国际贸易实务的内容概况；第二部分为国际贸易理论与实务部分，简单介绍国贸理论，重点介绍国贸实务，这部分内容从建立业务关系开始到进行国际贸易综合实习和技能训练为止。

本书的主要内容包括绪论，国际贸易原理与实务，建立业务关系，商品的品名、品质、数量和包装、商品的价格，国际货物运输与保险，国际结算，进出口商品的检验、检疫与报关、索赔、不可抗力与仲裁，进出口业务综合实训。

本教材既可作为高职高专院校国贸专业学生职业能力培养的核心课程用书，也可供英语专业学生作为国际贸易职业方向课程用书，以及外贸从业人员的自学参考用书。

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随着经济全球化进程的不断深入,我国与世界各国的贸易往来日益频繁,对外贸从业人员的综合素质和业务能力也提出了更高的要求。同时具备专业技能及专业外语知识,并能将专业技能和外语知识融会贯通的复合型人才越来越受用人单位的欢迎和重用。

为适应全球经济一体化对外贸从业人员的要求,培养高职高专学生的外贸业务能力,提高其外贸综合素质,按照中国高等教育学会“普通高等教育‘十二五’高职高专规划教材”的立项要求,本着“理实一体、工学结合”的方针、“实用为主、够用为度、应用为目的”的原则,我们编写了本教材。

本教材的特色及优势体现在以下四个方面。第一,英汉双语。中英文对照介绍进出口业务涉及的各个环节及操作流程。第二,校企合编。从业经验丰富的行业专家、外语专业扎实的资深教授、教学水平高的双师教学团队三方共同研究编写,确保教材内容的前瞻性、科学性、实用性。第三,实战案例丰富。吸收当前外贸企业最前沿的货物进出口案例及外贸单据,实现专业学习与工作岗位的近距离对接。第四,“课证融通、赛考结合”。本教材以当前全国国际贸易职业能力考证和技能竞赛单据的操作实务为标准,保证“课、证、赛、考”的有机融合。

为了支持本课程的教学,方便教师授课,教材编写组还特地配套了教学课件及导入案例和课后复习思考题的双语参考答案等资源。相关资源可参考教材最后一页教学支持证明即可获得。

本教材由山东外国语职业学院的拜文汇、郑美花任主编,并负责全书的策划和统稿;曲阜师范大学秦洪武、夏云教授承担了外语部分的修改、校对工作;山东外国语职业学院姜云臣教授参与了本书的整体内容设计。具体编写分工如下:拜文汇编写了绪论、第十二章;郑美花编写了第一章、第二章、第五章、第六章、第十章;高岩编写了第九章,丁明华编写了第三章、第四章和第十一章,刘娟编写了第七章和第八章。

在本教材编写及出版过程中,山东华信集团提供了大量业务背景素材、相关案例、外贸单证等资源,也得到了中国高等教育学会的支持和指导,另外山东外国语职业学院有关领导、国贸教研室各位同仁也给予大力支持与帮助,在此一并表示感谢。

尽管有资深教授和外贸行业专家的指导和参与,书中难免出现欠缺或疏漏之处,恳请学界专家、同仁及读者不吝指正。反馈邮箱:zmeihua888@163.com。

编者
2012年12月

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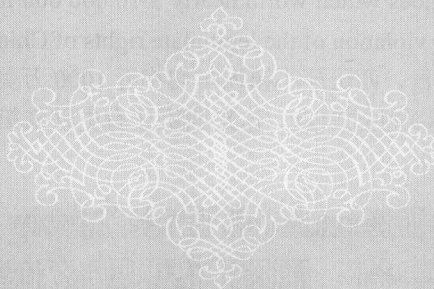
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Introduction

绪论



【 Learning Objectives 】 教学目的与要求

After learning this chapter, you will be able to:

1. Grasp both basic concepts of international trade theory and practice;
2. Understand the relationship between theory and practice of international trade;
3. Understand practice learning methods of International Trade Theory.



【 Lead-in Case 】 引导案例

Question: Please explain the reason why we shall study international trade by analyzing the description of Case 1 and Case 2?

问题：请分析案情一和案情二来解释我们为什么要学习国际贸易？

Case 1: German notifies China that China is forbidden to export mutton to German. The reason is that mutton hormone content exceeds the allowed amount, which will affect people's health. After investigation, China finds out that the mutton hormone content is as same amount as that in German, and China also gets the information that German is unceasingly importing the similar quality mutton from India. China believes that German has violated the GATT principles and China's benefits have been violated. German refates, they think they adopt the measures which do not violate the GATT principles, but belong to the general exception that is permitted.

案情一：德国通知中国，禁止从中国进口羊肉，理由是中国羊肉的荷尔蒙含量超标，影响德国国民的身体健康。中国经过调查发现，德国境内销售的羊肉荷尔蒙含量与中国羊肉的荷尔蒙含量是一样的。还发现，德国还不断地从印度进口同样质量的羊肉。中国认为德国违反了 GATT 的原则，中国的利益受到了侵害。德国反驳，他们采取的措施是不违反 GATT 原则的，是属于一般



例外所允许的。

Case 2: Elche, a town in Spain became the focus of the global attention on September 14th, 2004. Because the “made in China” shoes which worth nearly \$ 10 000 000 had been burned by a local illegal group. This was the first serious violation of the legitimate rights of China in the history of Spain.

案情二: 2004年9月14日, 西班牙小镇埃尔切将近1000万美元价值的“中国制造”鞋被当地不法集团烧毁而变成了全球关注的焦点。这是西班牙有史以来第一起严重侵犯华商合法权益、野蛮排斥华人的暴力事件。

Section One International Trade Theory and Practice

第一节 国际贸易理论和实务

1. Study Objective, Main Tasks and Main Contents of International Trade Theory 国际贸易理论的研究对象、主要任务和主要内容

(1) Study Objective 研究对象

International Trade Theory mainly studies the generation and development of international trade as well as trade interests between countries(region)and countries(region). International Trade Theory summarizes and extracts from the international trade practice, and focuses on the contents of theories and policies of international trade, especially emphasizes on the reasons and results of exchange for goods, services, factors of production and technology among the different countries or regions as well as policies concerned.

国际贸易原理主要研究国际贸易产生、发展的原因或基础以及贸易利益在国家或(地区)之间的分配问题, 是对国际贸易实践的总结和提炼。重点关注国际贸易理论与政策内容, 尤其是商品、服务、生产要素和技术在各国(或地区)之间交换的原因、结果及相关的政策。

(2) Main Tasks 主要任务

Main tasks of International Trade Principles are to reveal the characteristics of generation and development of international trade, basic theories of international trade, international trade policies and measures, bilateral or regional or multilateral trade relations, distribution of trade interests and the trend of trade development, etc.

国际贸易的主要任务是揭示国际贸易产生、发展的特点, 国际贸易的基本理论, 国际贸易政策和措施, 以及从双边、区域、多边层面上的国家间的贸易关系, 贸易利益的协调方式和贸易发展趋势等内容。

(3) Main Contents 主要内容

First, International Trade Principles focus on the description of generation, development and characteristics of international trade theory. International trade theory can be divided into three stages:

首先是关于国际贸易理论的形成、发展和特点的阐述。主要分为三个阶段:

① The early stage is called “the Classical Trade Theory”, represented by the Advantage Trade Theory of Adam Smith and David Ricardo.

早期的国际贸易理论被称为“古典贸易理论”, 以亚当·斯密和大卫·李嘉图的优势贸易理论为代表。

② The New-Classical Trade Theory of the early 20th century is represented by Heckscher and Ohlin.

20世纪初新古典贸易理论, 主要代表为赫克歇尔和俄林。

③ The New Trade Theory emerged after World War II, with the development of the internalization of multinational corporations and direct foreign investment. The theory mainly includes the New Factor Endowment Theory, the Preference Similarity Theory, the Dynamic Trade Theory, and the Intra-industry Trade Theory, etc.

第二次世界大战后新贸易理论是伴随跨国公司内部化和对外直接投资兴起的, 主要理论有新生产要素理论、偏好相似理论、动态贸易理论、产业内贸易理论等。

Second, International Trade Principles focus on international trade policies and measures as well as international trade development trend. 【Typical Case Link 2】

其次是国际贸易政策, 国际贸易措施和国际贸易的发展趋势。【典例链接 2】

① International Trade Policy 国际贸易政策

International trade policy refers to the principles and policies of administration of the import and export business for all countries and regions in a certain period. 【Typical Case Link 1】

国际贸易政策是世界各国和地区在一定时期对进出口贸易进行管理的原则和方针。【典例链接 1】

② International Trade Measures 国际贸易措施

International trade measures are the means to implement policies of international trade, and the measures to protect national trade interests, mainly includes tariff policy, non-tariff policy, export promotion policy, and export control policy.

国际贸易措施是一国实施国际贸易政策的手段, 是保护本国贸易利益所采取的一些举措。主要包括关税政策、非关税措施、出口鼓励政策、出口管制政策。

③ Since the 1990s, international trade has undergone many profound changes, illustrating as follows:

进入 20 世纪 90 年代以来, 国际贸易领域发生了许多深刻的变化。主要包括以下方面。

- Growing proportion of trade in high-tech products.

高技术产品贸易比重越来越大。

- Emergence of knowledge-intensive service trade.

知识密集型服务贸易的崛起。

- Networking of transaction in international trade.

国际贸易在交易方式上出现网络化趋势。

- Standardization of trade regulation in international trade.

国际贸易在贸易规则上出现规范化趋势。

Besides, main contents also include the study of the theory of International Division of Labor, Western International Trade Theory, Basic Knowledge on the World Trade Organization, International Trade of Service, International Trade of Technology, etc.

另外, 国际贸易的主要内容还包括国际分工理论、西方国际贸易理论、世界贸易组织基础知识、国际贸易服务和国际技术贸易等。

2. Study Objective, Main Tasks and Main Contents of International Trade Practice 国际贸易实务研究对象、主要任务和主要内容

(1) Study Objective 研究对象

It mainly studies the process of concrete operation for exchange of commodities between different

countries, including procedures, working methods and skills as well as relative behavioural norms of laws and conventions should be followed.

研究对象是研究国际性商品交换的具体运作过程,包括该过程经历的环节、操作方法和技能,应遵循的法律和惯例等行为规范。

(2) Main Tasks 主要任务

Through studying the international trade practice, students are supposed to master the basic procedures, basic rules and basic skills of international sales of goods; Under the learning to follow the relevant laws, regulations and international trade practices and conventions as well as carrying out the policies of our countries, to fulfill the aim of business operation and make favorable economic efficiency in foreign trade activities.

主要任务是通过国际贸易实务的学习,初步掌握国际货物买卖的基本流程、基本规则和基本技能;学会在遵循有关法律、法规与国际贸易惯例的前提下,正确贯彻我国的方针政策,实现企业的经营意图,在对外贸易活动中实现最佳的经济效益。

(3) Main Contents 主要内容

International Trade Practice is a comprehensive and applied course. Generally, it mainly focuses on sales of contract in international trade, and combining with relevant international practices and laws, giving a detailed description to the clauses of sales contract of international trade, the negotiation of contracts as well as the basic links and relative knowledge execution of contract.

国际贸易实务是一门综合性应用课程。一般来说,主要以国际货物买卖合同为中心,结合有关的国际惯例和法律,详细介绍国际货物买卖合同的条款、合同的磋商和合同的履行的基本环节及有关的知识。

① Relative Law and Convention in International Sale of Goods 国际货物贸易的有关法律和惯例

The Law and convention in international trade are the essential terms and conditions to operate international business effectively. E.g. *United Nations Convention on Contracts for the International Sale of Goods (CISG)*, *International Rules for the Interpretation of Trade Terms*, *Uniform Rules for Collection*, *Uniform Customs and Practice for Documentary Credits (UCP) 600* and etc.

国际贸易法律和国际贸易惯例是顺利开展国际贸易的基本条件。如《联合国国际货物销售合同公约》、《国际贸易术语解释通则》、《托收统一规则》、《跟单信用证统一惯例 600》等。

② Clause of Contract for the International Sales of Goods 国际货物买卖合同的条款

a. Commodity Clause: including name of commodity, quality, quantity, packing and commodity inspection.

商品条件:包括商品品名、品质、数量、包装及商品检验。

b. Price Clause: as a rule, it is integrated with Trade Terms.

价格条件:往往与贸易术语联系在一起。

c. Shipment Clause: make sure exporter how to deliver the goods to importer.

装运条件:确定出口方怎样把货物发运给进口方。

d. Insurance Clause: International transportation cargo insurance is achieved through insurance contract, the types of insurance are different to different modes of transportation.

保险条件:是通过订立保险合同来实现的,运输的方式不同,货物运输保险的种类不同。

e. Payment Clause: refers to methods of payment, there are three kinds of payment methods which widely used in the international trade: remittance (including mail, wire T/T, D/D), collection (including

D/P, D/A) and letter of credit.

支付条件: 主要指支付方式, 国际贸易常用的付款方式是 3 种: 汇付 (包括信汇、电汇 T/T、票汇)、托收 (包括 D/P 付款交单、D/A 承兑交单) 和信用证。

f. Disputes and Settlement: include claim, force majeure and arbitration.

争议和违约处理: 包括索赔、不可抗力和仲裁。

③ Procedures of Contract Negotiation 合同磋商流程

Business negotiation is an indispensable stage of concluding a transaction, which usually undergoes four steps as: inquiry, offer, counter-offer and acceptance.

交易磋商阶段是谈判成交的不可缺少的过程, 通常包括询盘、发盘、还盘、接受 4 个步骤。

④ Implementation of International Trade Contracts 合同的履行

Forwarding all kinds of documents and certificates to the negotiation bank for payment is as follows: 制作各种单证到议付行结汇等, 如下:

Bill of Exchange 汇票

Commercial Invoice 商业发票

Bill of Lading 提单

Insurance Policy 保险单据

Certificate of Origin 原产地证

Inspection Certificate 检验证书

Export Cancel Verification 出口收汇核销单

Customs Invoice 海关发票

Packing List 装箱单

Weight List 重量单

Measurement List 尺码单

Section Two Relationship Between International Trade Theory and Practice

第二节 国际贸易理论与国际贸易实务的关系

1. Summary and Guidance of International Trade Theory to Practice 国际贸易理论对国际贸易实务规律的总结和指导作用

International trade theory comes from practice in international trade, which is the experience generalization and summary of international trade practice.

国际贸易理论源于国际贸易实务, 是对国际贸易实务经验的概括和总结。

The function of international trade theory is to guide the realistic practice. It is the summary of the experience of commercial activity since a long time ago.

国际贸易理论是人类长期从事商业活动经验的积淀和结晶, 因而它能够作用并指导现实的实践活动。

In the early stage of development of capitalism, international trade policy in Western European countries was mainly based on mercantilist ideas. The only good of international trade is to pursue money, so the Western European countries implemented high tariff and protection policy which



restricted the development of capital economy or trade, and implemented trade protection policy of high tariffs, which restricted the economic development of capitalist.

资本主义发展初期, 西欧各国在国际贸易政策上主要依据的是重商主义思想, 以货币作为国际贸易追求的唯一目标, 实行高关税和国内的贸易保护政策, 这样制约了资本主义经济的发展。

Bourgeois economists Adam Smith and David Ricardo put forward the Theory of Free Trade. From their perspective, international division of labor will be formed and total production of a country will be creased without any change of labor force by free trade, thereby benefit trade countries respectively. Theoretical barriers to the countries participating in international trade were cleared, and international trade was greatly developed at that time.

资产阶级经济学家亚当·斯密和大卫·李嘉图提出了建立自由贸易秩序的理论。通过自由贸易交换, 形成国际分工, 在资本劳动力不变的前提下, 使国际贸易当事国生产总量增加, 从而有利于贸易各国。这样为各国参与国际贸易扫清了理论上的障碍, 国际贸易在当时得到了极大的发展。

2. Development, Examination and Revision of International Trade Theory by Practice 国际贸易实务对国际贸易理论的发展、检验和修正

Theory comes from practice, and must accept examination fo practice. When new problems arise from the international trade practice, the original theory could not be suitable for its development, so obstacles will emerge, which will eventually accelerate the development of theory.

理论来源于实践, 同时又必须回归实践、接受实践的检验。国际贸易在实际应用中会遇到新的问题, 原有的理论不能适应其发展, 就会产生阻碍, 最终会促进理论的发展。

“International Rules for the Interpretation of Trade Terms” (“INCOTERMS” in the following) formulated by the International Chamber of Commerce is one of the most important and widely used international trade practice in the world. Since the first general rule was drafted in 1936, revisions have been made to adapt to the development of international trade.

国际商会制定的《国际贸易术语解释通则》(以下简称《通则》)是当今世界上最重要、应用最广泛的国际贸易惯例之一。自1936年起草第一部通则以来, 就不断定期对其进行修改以适应国际贸易实务的发展趋势。

The “INCOTERMS” was revised to adapt to the demand of the trade terms to cargoes containerization in the containerized traffic, the multi-mode transport and uses the land route vehicles and the railroad flatcar in short distance sea transportation in 1990. In the “INCOTERMS 2000”, duties of sellers and buyers were listed in 10 entities instead of the original 13 entities, which facilitate the consultation. Modification of “INCOTERMS 2010” took the increase of world free zones, the widespread use of electronic communications as well as cargo transportation security into account. Terms like DDU, DAF, DES, and DEQ were deleted from the D group in “INCOTERMS 2000”. Meanwhile, two new terms were added to group D namely DAT (Delivered At Terminal) and DAP (Delivered At Place), which reflected the practical requirements of international trade, and were compatible with the United Nations Convention on Contracts for the International Sale of Goods (CISG) and the Rotterdam Rules.

1990年《通则》修订的主要原因是适应集装箱运输、多式联运和在短程海运中使用陆路车辆和铁路敞车的滚装运输中的货物集装化发展要求。在《2000年通则》中, 将13种术语项下买卖

双方的义务均采用 10 个项目列出, 便于查阅。

而通则 2010 的修改考虑了目前世界上免税区的增加, 电子通信的普遍使用以及货物运输安全性的提高, 删去了通则 2000D 组术语中的 DDU, DAF, DES, DEQ, 同时新增加了两种 D 组贸易术语, 即 DAT (Delivered at Terminal) 与 DAP (Delivered at Place)。这些都在很大程度上反映了国际货物贸易的实践要求, 并进一步与《联合国国际货物销售合同公约》及《鹿特丹规则》衔接。

Section Three Learning Methods of International Trade Theory and Practice

第三节 国际贸易理论与国际贸易实务的学习方法

International trade is a practical and foreign-featured course. Most students do not have experience of the particular business of international trade, therefore, during the period of learning the course, they are supposed to combine the theory with the practice of domestic trade or economic life together, and apply more practical skills and techniques to learning this course.

国际贸易是一门实践性、涉外性很强的课程。大多数学生没有接触到国际贸易的具体业务工作, 在学习中就应将理论知识的学习尽量地联想到国内贸易或当前的经济生活实际, 多运用一些实践性的学习方法。

1. Task-driven Method 任务驱动法

Set up a complete “work tasks” situation for the study of international trade. For example, an export company, on receiving orders from customers, is required to process packaging, transportation, insurance and other operations according to the requirements of the importer and condition of the goods, students can acquire the theoretical knowledge in the process of assignment and accomplishment.

模拟真实场景, 制定一套完整的“工作任务”。例如: 某出口公司接到客户订单, 要根据进口公司的要求及货物的情况, 进行货物包装、运输、保险等具体业务操作, 学生可以在任务设置和完成的过程中学习到相关的理论知识。

2. Role-play Method 角色扮演法

Set a training environment accessing to the actual scene of real work position, which can help understand the content of the roles and increasing the ability of problem-solving through taking participate in a role-play. For instance, students can be divided into several role-play groups, which act as the role of the exporter, the importer, the bank, and the forwarder respectively and etc. This can help to imitate the procedures of negotiation and payment in international trade contract. Through students' participation and interactive communication, their action-response ability and psychological quality will be enhanced, as the same time students also will recognize their own disadvantages and weaknesses by mutual comments.

设定一个最接近工作岗位的培训环境, 指定参加扮演某种角色, 借助角色演练来理解角色内容, 从而提高解决现实问题的能力。例如, 学生可以分成若干小组, 小组成员分别扮演出口商、进口商、银行、货代企业等, 模拟真实的国际贸易磋商与合同结算, 通过学生的参与和互动交流, 使学生的反应能力和心理素质得到强化; 同时通过互相点评, 学生认清了自身的缺点和不足。



3. Case-analysis Method 案例分析法

The teacher can design a specific given knowledge point Case-Problem, supply with massive background materials and demonstrate the real scene of international business. The participants can analyze the question and propose solved methods with the professional knowledge.

针对某个重要知识点,由教师设置一个特定案例,提供大量背景材料,展示真实背景,让学生依据专业知识来分析问题,提出解决问题的方法。

In the process of learning, a variety of specific case analysis can enable students to understand what is a contract, contract-signed, the performance of the contract, the duties and obligations between the importers and exporters, and so on. This can guide students to generalize the regularity through discussions, develop the ability of analyzing and solving problems independently and flexibly, and form cultivate good study habits.

在学习过程中,通过各类具体案例分析,使学生更加深刻的理解什么是合同、合同签订的方式、合同的履行、进出口商的责任义务等内容,从而引导学生通过思考讨论得出规律,培养独立、灵活分析问题和独立处理问题的能力,养成良好的学习习惯。

4. Bilingual Teaching Method 双语教学法

The foreign-featured in international trade field determines the importance of foreign language acquisition for students. Therefore, on one hand, the students should acquire the professional knowledge of foreign trade; on the other hand, they should also develop the ability of English of foreign trade during the study of this book. A gradual and graded immersion teaching method can be adopted on the basis of students' foreign language levels respectively. The whole semester will be roughly divided into three stages with different proportion of Chinese and English used in professional curriculum teaching. The proportion of English will gradually increase.

国际贸易专业的涉外性决定了学生的外贸外语学习很重要。因此,在本书的学习中,一方面要学好专业知识,另一方面也要培养外贸英语的能力。可以根据学生各自的外语基础,采用循序渐进,分级渗透式的方法,将整个学期的学习大致分成3个阶段,不同的阶段,中英文语言讲授专业课程的比例不同,英语所占的比重逐渐加大。

In the first stage, for important knowledge, using Chinese to teach first and then using English to repeat, to emphasize, to explain and to memorize the important theory and trade terms; in the second stage, gradually increased English proportion will be, attaching Chinese explanation to complex and difficult professional knowledge, to encourage students to learn how to use English to express professional content; in the third stage, applying English language for teaching basically, students ability to express professional knowledge in English will be improved.

在第一个阶段使用中英文结合,对于重要的知识,使用中文讲授一遍后,再使用英文讲授一遍,重要的定理和关键词,使用英文强调重复讲解、记忆;第二阶段逐步加大英文的比例,复杂难解的专业知识附以中文解释,在教学互动环节,鼓励学生学会如何使用英文表达专业内容;第三阶段,基本使用英语进行讲解,提高学生用英语思考表述专业问题的能力。