

零售商 买方势力 研究

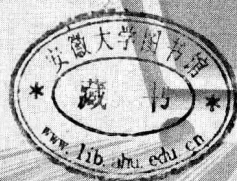
吴清萍 ■ 著



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摘 要

近些年来,随着技术的变化和生产力的发展,社会产品极大地丰富,消费者的需求越来越成为企业经营的稀缺资源。零售商由于居于产业链的最后环节,可以低成本地获取大量的消费者信息,与此同时,零售商规模不断扩大,零售市场集中度逐渐提高,零售商对生产商的议价能力不断增强。生产商与零售商在产业链中的主导地位发生置换,零售商在中间投入产品市场上的买方势力越来越强。买方势力是与卖方势力相对立的一个概念,两者实质上都是市场势力。传统经济学对市场势力的研究仅限于以卖方势力为研究对象,几乎完全忽略了买方势力。自20世纪50年代以来,产业组织理论开始关注制造商和经销商的纵向约束问题并展开研究,进入90年代,随着零售商主导实施纵向约束的现实现象越来越普遍,国外一些学者开始将研究点转向零售商买方势力问题,并取得一批研究成果。但是现有文献中存在一些待解决的问题,其一是买方势力的范畴有待明确界定;其二是如何统一理论研究框架;其三是对买方势力的福利评价标准各异,无法为相关公共政策提供理论指导。以上问题的存在限制了对现有研究方法的延伸及研究结论的引申,直接影响后序研究的开展。本书紧扣零售商买方势力问题,因循S-C-P的研究思路,结合现实的市场条件,对零售商买方势力进行较为系统的研究,既具有理论意义又具有实践价值。首先,以买方势力为研究对象可以从理论上补足现有市场势力理论的缺失部分;其次,本研究以产业链为背景将产业组织理论的基本S-C-P研究范式引入到零售商买方势力问题的研究中,既为系统揭示现实中零售商买方势力的经济本质提供了新的视角,又拓展了经济学对市场势力的研究方法;最后,通过系统地研究零售商的买方势力,探析促成零售商买方势力的因素,理清零售商行使买方势力的行为以及相应的福利影响,可以及时地为我国针对流通产业的公共政策实践提供理论指导。

全书共有7章,分别为导论、文献综述、零售商买方势力的界定及影响因素、零售商行使买方势力的行为、零售商买方势力的福利效应、我国零售商买方势力现状及反垄断规制建议、结论与展望。研究主线因循结构—行为—绩效的基本逻辑思路:首先,在斯塔克伯格的市场结构类型背景下对零售商买方势力进行界定,并在此基础上区分出买方垄断势力和买方谈判势力两种买方势力形式,进而在市场供求均衡框架中分析影响零售商买方垄断势力的因素以及在谈判的合作博弈均衡框架中分析零售商买方谈判势力的影响因素。其次,研究零售商行使其买方势力的行为选择。分别分析具有买方垄断势力零售商的产量决策行为和具有买方谈判势力零售商的纵向约束行为,在分析零售商供应商的纵向约束行为时,从一般到具体,将研究重点集中在零售商主导的纵向约束行为上,探讨零售商采用纵向约束行为的动机,分析买方势力对零售商供应商纵向约束行为的影响,并以通道费为例,构建一个三阶段谈判博弈模型分析零售商买方势力的存在对通道费用发生起决定性作用。再次,分析零售商买方势力的福利效应水平。在产业链的研究背景下,结合市场上供给方的竞争状况,确定评价零售商福利效应水平的长期效率基准和短期效率基准,并依据效率基准,分别对零售商的买方垄断势力和买方谈判势力的社会福利水平进行分析。然后将零售商个体化,分析单个零售商行使其买方谈判势力对纵向产业链上相关经济个体的私人福利水平的影响,同时探讨零售商买方势力的抗衡势力效应,并提出零售商买方势力福利效应的政策含义。最后,依据我国国内市场上零售商的实际情况,探讨我国市场零售商买方势力的形式以及影响零售商买方势力形成的现实因素,并考察我国国内市场上零售商行使买方势力的行为,结合我国新颁布的《反垄断法》提出对我国零售商买方势力进行反垄断规制的建议,此外,对国内市场上外资零售商买方势力不断扩张的现实情况进行分析。

在研究过程中除了以SCP理论范式为主要方法外,还采用了博弈论方法、市场供求局部均衡分析方法、比较静态分析与动态分析相结合的方法、模型分析与实证研究相结合的方法等。通过研究,本文得到四点结论:①买方势力具有两种形式:买方垄断势力和买方谈判势力。产业链上零售商的数目、上游市场的供给状况、下游市场的需求状况影响零

售商买方垄断势力的强弱程度，而供应商零售商对对方的经济依赖性对比决定了零售商买方谈判势力的强弱程度。②零售商行使买方势力的行为不局限于缩减购买量一种行为。拥有买方谈判势力的零售商可以通过纵向约束行为来行使其买方势力，零售商实施纵向约束行为的根本动机在于消除产业链上纵向外部性和横向外部性以实现自身利润最大化，但是由于交易主体之间策略相互依赖，零售商主导实施的一些纵向约束行为（如索要通道费）可能引发供应商采取市场排斥行为而损害市场竞争。③零售商买方垄断势力的行使会造成社会福利的无谓损失，而零售商买方谈判势力的行使却有可能增进社会福利。④目前我国零售商具有的买方势力为买方谈判势力形式，在反垄断界定时应以“相对经济优势地位”为逻辑起点对零售商行使买方势力行为进行规制。

本书的创新之处主要体现在三个方面：

1. 区分了买方垄断势力和买方谈判势力两种形式的买方势力

本书在斯塔克伯格的市场结构类型背景下对零售商买方势力进行界定，依据市场结构类型的差异，区分出买方垄断势力与买方谈判势力两种买方势力形式，从而解决了已有研究中因买方势力界定不明确而产生的研究结论难于比较的问题。特别是在国内，尽管已经意识到零售商主导实施的纵向约束行为可能具有促进市场效率的作用，但是由于已有的研究一直将买方势力等同于买方垄断势力，从而无法从理论上全面论证零售商买方势力的福利效应。界定出零售商买方垄断势力和零售商买方谈判势力两种买方势力形式，可以在福利分析时选择有效地分析工具以得到可信的结论。

2. 确定了评判零售商买方势力福利效应的短期效率基准

本研究延续经济理论一贯的以完全竞争为效率基准的原则，以产业链为分析背景，将郁义鸿（2005）提出的纵向产业链效率基准作为评判零售商买方势力的长期效率基准。同时注意到传统经济理论以完全竞争为效率基准暗含的市场条件是市场另一面总是处于分散的、完全竞争的状态，但在本研究中上游市场供应商却不一定是分散的、完全竞争的状态。上游市场供应商竞争状态不同意味着市场条件不同，本研究兼顾零售商买方势力存在的市场条件差异，提出在当前市场条件下，零售商在上下游市场均处于完全竞争状态时，相邻市场均衡时的市场效率和社

会福利水平作为评判零售商买方势力效率的短期基准。在对零售商买方势力的两种形式进行社会福利分析后,得到依据短期效率基准判断的零售商买方谈判势力可以产生社会福利效应的改进这一结论,为加尔布雷思提出的“抗衡势力”假说在理论上存在可能性提供了佐证。

3. 提出依据“相对经济优势地位”对我国零售商买方势力进行反垄断性质界定

我国零售商规模普遍偏小,无论在上游采购市场还是在下游零售市场都不具有我国新颁布的《反垄断法》所界定的“市场支配地位”,但是,在我国一些零售商倚重其在上游采购市场的买方谈判势力所实施的行为却具有垄断的含义,应该纳入到《反垄断法》的规制对象中,本文在对买方谈判势力进行理论分析的基础上,提出应该将我国《反垄断法》中对“市场支配地位”的界定延伸到“相对经济优势地位”的界定,并以此为依据提出对零售商滥用买方势力的行为进行反垄断规制程序的具体建议。

关键词: 买方势力; 买方垄断势力; 买方谈判势力; 纵向约束; 相对经济优势地位

ABSTRACT

In recent years, the world has witnessed considerable changes in retailing with the general upsurge of large retailers and the significant increase of the retail market concentration. The success of reducing consumers' purchase cost and the efficiency of inventory control have allowed large retailer to reap economies of scale and scope. At the same time, the consumer demand has become rare resource to enterprises owing to the excess products in market. Retailer can obtain more consumer information with low cost than supplier, which makes retailers dominant in their business deal with suppliers. Retailers' buyer power is being reinforced in upstream market now.

The conception of buyer power is opposing the conception of seller power. Research on market power has only focused on the seller power in classical economics although buyer power is another form of market power. Since the 1950s, the theory of industrial organization has been concerned about the topic of the vertical restraints between manufacturers and dealers. In 1990s', there were growing literatures on retailers' buyer power abroad because more and more vertical restraints implemented by retailers in the market. Yet, some questions should be answered: how to define the buyer power? how to build a more formal study framework to buyer power? how to evaluate the efficiency of buyer power based on a united efficiency benchmark? Taking account of the reality that retailers own buyer power, this thesis systematically researches the retailers' buyer power following the form of structure-conduct-performance, which is significantly valuable both in the theory and in the practice. Firstly, the study of buyer power can complete the theory of market power. Secondly, this thesis introduces the S-C-P form of industrial organization into the study of retailers' buyer power on the industrial-chain-background, which not only

gives a new perspective on the economical rule of retailers' buyer power but also develops a researching method of the market power. lastly, after identifying the sources of the retailers' buyer power and evaluating the potential impacts of buyer power, we can give relevant suggestions on the public policy of Chinese retail industry.

This thesis contains seven chapters: the introduction, the review on the relevant literature, the definition of the buyer power and its sources, the conducts of the retailers exerting their buyer power, the welfare effect of the retailers' buyer power, the reality of retailers' buyer power in Chinese domestic market and suggestion on the antitrust, the conclusion and the prospect. Following the path of Structure-Conduct-Performance Form, this thesis firstly defines the retailers' buyer power according to the structure of markets proposed by Heinrich von Stackelberg (1934). Also two forms of buyer power—the monopsony power and the buyer bargaining power are distinguished. Moreover, the sources of the retailers' monopsony power were discussed via a market interface while the sources of the retailers' bargaining power were analysed via a bargaining game interface. Secondly, the conducts exercised buyer power by retailers is studied. In this part, more attention was paid on the vertical restraints implemented by retailers who own bargaining power. Subsequently, according to the competing conditions of suppliers, two benchmarks—the longterm efficiency benchmark and the shortterm efficiency benchmark—are settled to evaluate the social welfare of retailers' buyer power. Then the impact of retailers' bargaining power on the relevant individuals is evaluated. Lastly, this thesis identifies the reality of retailers' buyer power in domestic market through discussing the main form of retailers' buyer power and the sources of it in Chinese market and surveying the practice of vertical restraints implemented by powerful retailers. Also some suggestions are proposed on the antitrust regulation of retailers' buyer power in this thesis.

In addition to the form of S-C-P as the main research methods in this thesis, some other research methods are also applied in it, such as the game theory, the partial equilibrium competitive analysis, the unification of compara-

tive statics analysis and dynamic analysis, the method based on model analysis and positive analysis. Four conclusions are drawn in this thesis: ① There are two forms of buyer power—the monopsony power and the buyer bargaining power. the retailers' monopsony power is influenced by factors such as the number of retailers in industrial chain, the supply conditions in upstream market and the demand conditions in downstream market, while the comparative dependence of retailers (suppliers) to another side influences the retailers' buyer bargaining power. ② Except for the contraction of purchase, the conducts of retailers' exerting their buyer power also includes the vertical restraints implemented by the retailers who own buyer bargaining power. Though the essential incentive of the vertical restraints retailers imposing on suppliers is to maximize their benefit through eliminating various externalities in the industrial chain, some vertical restraints implemented by retailers such as slotting fees could cause the exclusive dealing, thus dampening the competition. ③ while the monopsony power would cause deadweight loss of social welfare, the buyer bargaining power of retailers might improve the social welfare. ④ As the buyer bargaining power is the key form of retailers' buyer power in domestic market nowadays, the authorities should consider the retailers' comparative economic advantage status and regulate their practice of exerting buyer power in accordance with The Antitrust Law.

There exist three innovative ideas in this thesis:

Firstly, two forms of buyer power—the monopsony power and the buyer bargaining power—are distinguished in this thesis. the monopsony power and the buyer bargaining power are defined based on the structure of markets proposed by Stackelberg, which can give a uniform background to analyze buyer power. Though vertical restraints implemented by retailers have recently received considerable attention in our country, most research on this topic took the buyer power equal to the monopsony power, which was apt to be at a loss when analyzing the welfare of the buyer power. The distinction of monopsony power and buyer bargaining power can help us to find more effectual method of welfare analysis and to ensure the creditability of the conclusion.

Secondly, the shortterm efficiency benchmark to the welfare evaluation of buyer power is settled with the longterm efficiency benchmark. This thesis introduces the efficiency benchmark of vertical industrial chain proposed by Yu Yi-Hong (2005) as the longterm efficiency benchmark in this study. At the same time, it's noticed that the other side of market is always assumed to be in complete-competition conditions in traditional economics, while in this study, the suppliers in upstream market are not always in complete-competition, the thesis settles the shortterm efficiency benchmark—the efficiency of the market condition that retailers are in complete-competition not only in upstream market but also in downstream market while the other conditions are given. After evaluating respectively the welfare of each form of buyer power, this thesis concludes that the retailers' buyer bargaining power could bring an improvement of social welfare according to the shortterm efficiency benchmark, which provides a proof to the existence of countervail power proposed by Galbraith (1952).

Lastly, it is suggested that the comparative economical advantage status should be the criterion when judging the retailers' buyer power in accordance with The Antitrust Law in china. Because of their small size, retailers in Chinese market are not in dominant position at any market in accordance with The Antitrust Law. However, some practices of buyer power in upstream market have antitrust intention to a certain extent, which should be regulated by the Antitrust Law. Based on the theoretical analysis of buyer bargaining power, this thesis suggests that the market dominant position in The Antitrust Law should be extended to the comparative economical advantage status. Also, some concrete advices on the antitrust regulating process of the abuse of retailers' buyer power are given.

Keywords: Buyer Power; Monopsony Power; Buyer Bargaining Power; Vertical Restraint; Comparative Economical Advantage Status

符号说明

n : 下游市场相互独立的转售供应商产品的零售端口数, 若下游市场上每一零售商只控制一个零售端口时, n 亦为下游市场零售商的数目;

W : 上游市场上中间产品的市场价格;

w_i : 零售商 i 与某供应商进行交易时由双方议定的中间产品价格;

P : 最终产品的市场价格;

p_i : 零售商 i 的索要的最终产品价格;

S_i : 供应商与零售商 i 签订交易契约时的预先支付费, 费用与双方的交易数量无关。 $S_i > 0$, 意味着零售商向供应商支付费用, $S_i < 0$, 则代表供应商向零售商支付的通道费用;

F_i : 供应商与零售商 i 议定的由零售商向供应商支付的固定费用, 该费用仅在双方交易数量大于 0 时才支付;

Q : 下游市场上最终产品的数量;

q_i : 零售商 i 与供应商交易的中间产品数量, 同时也代表零售商 i 在下游市场提供的最终产品数量;

r_i : 零售商 i 所控制的零售端口数;

x_i : 零售商 i 所经营的最终产品种类;

R : 零售端口的某一最终产品的销售收入;

U : 供应商与零售商交易所获得的支付;

π_i : 零售商 i 的销售利润;

Π : 零售商与供应商达成交易实现的联合总利润;

C : 供应商提供中间产品的成本;

K : 零售商的经营成本;

ρ_i : 零售商 i 所获得的增量剩余的份额, 实质上反映了零售商的谈判权重;

φ^U : 上游市场上零售商 i 的推测变分;

φ^D : 下游市场上零售商 i 的推测变分;

MS : 马歇尔剩余值, 等于消费者剩余加上生产者剩余, 用于表示社会福利水平的高低。

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