



广东外经贸蓝皮书[®]

LUE BOOK OF FOREIGN ECONOMICS & TRADE ON GUANGDONG

广东对外经济贸易 发展研究报告 (2012~2013)

ANNUAL REPORT ON DEVELOPMENT RESEARCH
OF FOREIGN ECONOMICS & TRADE ON GUANGDONG
(2012-2013)

主 编 / 陈万灵

副主编 / 林吉双 袁 欣



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主要研究领域：国际贸易与经济发展。曾主持教育部哲学社会科学研究重大课题攻关项目1项，国家社会科学基金1项，省（部）级课题4项，广东省人文社科基地重大项目1项，厅局级课题4项，主持政府政策咨询、企业委托研究项目10多项。在《经济研究》、《改革》等专业刊物上发表论文70余篇，专著1部，主编教材1部。2005年获得广东省首届哲学社会科学优秀成果奖（政府奖）二等奖。

林吉双 男，黑龙江人，经济学教授，现为广东外语外贸大学国际服务外包研究院院长。兼任广东省服务外包投资促进会、广州市服务外包协会副会长，广东省价格协会常务理事，广州市政府采购专家评审委员等。主要研究方向为宏观经济学、制度经济学和国际贸易学等。在《人民日报》、《光明日报》、《中国教育报》和《改革》等报刊和期刊上发表论文近50篇，其中，多篇被中国人民大学复印资料中心全文转载；主编教材和合作出版著作3部；主持完成省级以上课题和政府横向课题近15项；主持完成的教学改革成果，获得省级教学成果一等奖、二等奖各一项。

袁 欣 男，山东青岛人，经济学博士，教授，现为广东外语外贸大学国际经贸研究中心副主任。主要研究方向为国际贸易学和发展经济学。出版《转型时期的中国对外贸易研究》、《对外贸易经济效益研究——中国历史发展的经验》、《对外贸易结构的动态演进——广东的经验分析》三部学术专著；在《经济学家》、《法学家》、《宏观经济研究》、《国际经贸探索》等学术期刊发表研究论文 40 余篇，主持完成教育部人文社会一般项目研究课题“贸易结构、产业结构与比较优势的关系：理论与实证”，另参与十余项国家社科基金及省部级课题的研究工作。

摘 要

2012 年世界经济延续了国际金融危机后的复苏态势，但复苏步伐明显放缓，而且复苏进程不平衡，经济下行风险明显抬头。受其影响，中国对外贸易增长速度明显放慢，2012 年外贸进出口总值 38667.6 亿美元，同比增长 6.2%，比 2011 年增速 22.5% 降低了 16 个百分点。显然，广东外经贸发展同样会受到严重影响。

在国内外复杂经贸形势背景下，“总论”部分对广东外贸状况进行了分析，并对未来发展趋势进行了预判，由两篇研究报告构成，一是《广东外经贸形势分析报告（2012 ~ 2013 年）》，对目前外经贸形势进行了综合分析。从 2012 年月度数据看，广东外贸规模在波动中上扬，从 1 月份的 618.1 亿美元增加到 1003.0 亿美元，月均增长 4.5%；其中进出口总值除了 1 月份负增长外，其余月份实现了正增长，2 月份反弹增长速度最高，达到 26.8%。其次，对 2013 年世界经济和国内经济的基本走势进行了预判，指出 2013 年广东商品出口贸易的增幅预计为 10% 左右；各月的增幅比较稳定，在 10% 上下波动，下半年的增幅略高于上半年；贸易顺差会减少，加工贸易转型升级将继续推进，贸易结构将继续优化。2013 年利用外资的增速保持在 10% 左右。“走出去”步伐加快，对外投资及经济合作将快速增长。二是《广东对外贸易发展状况：基于中国外贸先进地区的比较》，展示了广东外贸缓慢增长的基本特征；并通过与国内外外贸先进地区的比较分析，发现近几年广东外贸发展在全国的地位有所下降；但是广东仍然属于外贸大省，2012 年进出口值 9838.2 亿美元，仍占中国的四分之一，达到 25.4%；同比增长 7.7%，比中国平均增幅快 1.5 个百分点。其次，广东外贸增长方式有所转变，一般贸易逐步扩大，出口商品结构逐步优化，出口市场多元化初步形成。再次，广东服务贸易规模不断扩大，其增速波动比较大，近几年呈现快速增长势头。广东服务贸易额从



2001 年的 48.7 亿美元，增长到 2012 年的 1064.76 亿美元，年均增长 32.37%。2012 年比上年增长 71.76%，显示超高速增长的气势。其服务贸易结构不断优化，咨询及金融保险、专利权使用费和特许权、建筑安装及劳务承包服务等现代服务业贸易占比大幅上升。比较而言，服务贸易规模仍然较小，在全国排第三位，与广东外贸大省的地位不一致；其服务贸易与货物贸易比值偏低，仅为 10.82%，说明服务贸易发展明显滞后。

广东近几年在外贸增长方式转型方面取得了初步成效，出口市场结构和市场多元化都有所优化，服务贸易得到较快发展。上年度的蓝皮书对出口市场多元化进行了重点研究。本年度围绕服务贸易发展，安排了以下三个研究专题。

“广东服务贸易发展专题”由 4 篇研究报告构成，重点探讨广东区域服务贸易发展问题。一是《服务贸易发展新机遇与广州的新情况和新思路》，分析了国际服务业的转移和贸易发展趋势给广州服务贸易发展带来的新机遇；针对广州服务贸易发展的新情况和新问题，提出了服务贸易发展的新思路，要求实现服务贸易管理体制、机制的创新，巩固和提升传统优势服务业贸易，大力发展知识密集型 and 新兴服务业贸易。二是《深圳服务贸易发展的评价和方向选择》，对深圳服务业发展状况进行了评价，指出了深圳服务贸易发展问题，提出了深圳服务贸易发展的思路 and 方向，以体制改革和技术创新为动力，利用国际服务业转移的历史性机遇，优化产业结构，建立服务贸易与货物贸易并重的合理贸易结构。三是《广东服务外包产业的发展现状、问题 and 对策》，通过广东服务外包业态的发展现状，说明广东在承接国际服务外包方面与江苏和北京等地区存在一定的差距，如服务外包的规模小、产业集中度低、区域特色不明显和价值链低端等不足，提出从产业规划、发展动力、人才培训和商务环境等方面有效推进服务外包业态的发展。四是《广东构建科技服务业外包基地模式研究》，从产业集聚的视角，揭示科技服务业外包基地的内在逻辑，探讨广东科技服务外包基地的条件与基础及其所存在的问题，提出构建和完善科技服务外包基地的产业领域及模式。通过上述专题研究揭示了广东服务贸易的区域问题，主要是其区域布局和市场结构都相对集中。以 2011 年数据为例说明。广东服务贸易额 1145.81 亿美元（含深圳），在区域上高度集中于广州和深圳两地，其中广州占 20.91%，深圳占 45.90%；其市场又主要集中于香港市场，



粤港服务贸易额达 394.5 亿美元, 占全省服务贸易总额的 34.4%, 充分体现了广东服务贸易“前店后厂”模式的特点。从业态上看, 广东承接服务外包规模不断扩大。2011 年, 广东服务外包合同的执行额达到 34.5 亿美元, 增长了 46.8%, 其中, 离岸服务外包执行额达到 28 亿美元, 同比增长了 47.7%。另外, 服务外包合同额达到了 53.9 亿美元, 同比增长了 60.2%, 其中, 离岸服务外包合同额达到 37.6 亿美元, 同比增长了 48.5%, 显示未来增长潜力。

“广东服务业开放与合作专题”由 3 篇研究报告构成, 主要探讨广东服务业对外开放及其经济合作状况, 阐述了进一步开放的重要性和依据, 提出广东服务业开放思路、重点开放领域的发展方向。一是《广东生产性服务业评价: 兼论其对外开放的重要性》, 运用直接消耗系数、完全消耗系数、影响力系数和感应力系数等指标描述广东生产性服务业的发展现状, 并从经济关联性和产业关联性的角度阐明了生产性服务业滞后性, 远远不能满足广东转变经济发展方式的需要, 必须加快对外开放。二是《生产性服务业 FDI 流入对制造业的影响》, 利用 2004 ~ 2011 年北京、上海、广州的面板数据, 从服务业 FDI 知识溢出的视角, 对信息技术服务和商贸流通进行比较分析, 发现外资企业能够激活本土人才及技术存量、强化市场竞争, 从而产生了正向外部性, 说明生产性服务业 FDI 流入对整体制造业企业、内资企业和外资企业的效率具有拉动作用。提出了加大对生产性服务业的扶持, 加强服务业开放政策制定, 主要是加快商贸流通业的开放等政策建议。三是《粤港澳服务业重点领域合作的新思考》, 首先回顾了 CEPA 协议实施以来粤港澳服务业合作深化的过程, 阐述了粤港澳在物流业、旅游业、金融业、专业服务业、信息服务业、科技服务业、会展业、创意产业等重点服务业合作现状, 并提出了这些重点合作领域思路和方向。

“中国服务贸易环境及其发展专题”由 5 篇研究报告构成, 主要从中国服务贸易角度探讨广东服务贸易发展的环境和形势。一是《制度环境对中国服务业增长的影响机制分析》, 从政府主导型的资源配置结构、非国有经济、知识产权保护、城市化进程以及行业竞争环境等方面刻画了中国市场化改革的制度环境, 并运用计量分析方法证明了制度变迁对服务行业增长的影响。结果表



明：政府主导的资源配置结构对国内服务业增长有阻碍作用；非国有经济和城市化进程形成对服务产品的有效需求，及高质量的知识产权保护和充分的市场竞争环境都有利于国内服务业增长。二是《中国美国印度服务贸易比较优势变动之比较》，对中国、美国和印度服务贸易的比较优势和贸易结构差异进行了比较，发现中国在劳动力资源密集的服务业贸易具有比较优势，美国在一些人力资本密集型和物质资本密集型的现代服务业具有比较优势，印度仅在人力资本密集型的计算机与信息服务业具有较强的比较优势。并从这个结论引申出政策含义：通过发展教育、加快人力资本积累来优化服务业内部结构，改善服务贸易收支状态。三是《中国文化创意产品出口的现状、问题及对策》，根据联合国贸发会数据，描述了中国文化创意产品的出口总量和结构现状，深入探讨了其问题，并对未来发展提出了相应的对策。四是《中国和美国文化贸易状况及其竞争力比较分析》，通过对中国和美国文化贸易规模、结构特征及贸易竞争力的国际比较，发现近年来中国文化贸易的优势集中于传统项目；文化服务贸易发展严重滞后，其竞争力极低；而现代文化产品和服务贸易的竞争力非常弱。据此提出了加快文化产业发展，优化文化贸易结构，提升文化贸易竞争力等发展思路。五是《中国与其他新兴经济体创意产业贸易的比较分析》，对中国与新兴市场国家创意产品贸易的现状、比较优势、互补性和竞争性进行了分析，发现南南贸易是未来创意产品贸易增长的主要部分，中国与东盟国家和“金砖国家”创意产品贸易的互补性和竞争性并存。提出促进中国对新兴市场国家创意产品出口贸易，及其与新兴市场国家创意产业合作的鼓励政策。

归纳起来，广东关于加快服务业和服务贸易发展的政策近几年逐步显示出成效，广东服务贸易规模不断扩大，实现了快速增长；服务贸易结构有一定优化。但是，区域分布不平衡，服务业制度环境及其对外开放程度还不利于中国服务业对外贸易和经济合作。需要加强服务业制度创新，推进市场化改革，发展民营经济，提高知识产权保护；扩大对外开放，充分利用 CEPA 协议，加强与香港、澳门服务业合作；通过发展教育和加快人力资本积累来提升服务业国际竞争力。

Abstract

The world economy continued the recovery trend after the international financial crisis, but the recovery pace slowed down, the recovery process was unbalanced, and the risk of economic downturn had clearly gone up in 2012. Under the influence of world economic trend, China's foreign trade growth slowed down significantly. In 2012, the import and export value was U. S. MYM 3.86676 trillion, a year-on-year growth of 6.2% , 16 percentage point lower than the growth rate of 22.5% in 2011. Obviously, Guangdong foreign trade and economic development would also be severely affected.

Against this background, the "General Report" section arranges 2 research reports to analyze the situation of Guangdong foreign trade and predict future development trends. *A Situational Analysis of Guangdong Foreign Economy and Trade (2012 - 2013)* makes a comprehensive analysis on the current situation of foreign economy and trade. Firstly, Guangdong foreign trade scale browsed in fluctuations on the monthly data of 2012, which increased to U. S. MYM 100.3 billion from U. S. MYM 61.81 billion in January, and the average monthly growth was 4.5% ; even though in January the import and export value was in negative growth, the rest months it managed to showing positive growth, and the rebound growth rate in February was highest, rising to 26.8% . Secondly, this paper forecasts the basic tendency of world economy and domestic economy in 2013, pointing out that Guangdong commodity export growth is expected to be about 10% ; the growth in each month will be stable, fluctuating in 10% , and the growth in the second half year will be slightly higher than the first half; trade surplus will reduce, the transformation and upgrading in processing trade will continue to promote and the trade structure will continue to optimize. The utilization of foreign capital will keep the rate of 10% in 2013. The pace of "Going out" will speed up and the foreign investment and economic cooperation will grow rapidly. *The Development Status of Guangdong Foreign Trade—A Comparison Based on the Advanced Areas of China* firstly



shows the basic characteristics of slow growth in Guangdong foreign trade; the national status of Guangdong declines in recent years through a comparative analysis with the domestic and foreign advanced areas in foreign trade development; but Guangdong is still a largest province on the foreign trade scale, the import and export value is U. S. MYM 983.82 billion in 2012, still accounting for a quarter of China's and reaching 25.4%; a year-on-year growth of 7.7%, 1.5 percentage point higher than the average growth of China. Secondly, the growth mode of Guangdong foreign trade has shifted, the general trade is gradually expanding, the structure of commodities export is optimizing, and the export markets diversification is initially formed. Thirdly, the scale of service trade in Guangdong has been expanding with a bigger fluctuation, showing a rapid growth in recent years. Guangdong service trade increased from U. S. MYM 4.87 billion in 2001 to U. S. MYM 106.476 billion in 2012, with an average annual growth of 32.37%. In 2012, a 71.76% increase over the previous year displayed the trend of ultra-high-speed growth. The structure of service trade has been optimizing, modern service trade rises sharply, such as consulting and finance insurance, patent royalties and concessions, construction and installation and labor contracting services. By contrast, Guangdong service trade has a small scale, ranking third in China, which is inconsistent with the status of Guangdong foreign trade; ratio of service trade and goods trade is low, only 10.82%, indicating that the development of service trade has lagged far behind.

The transformation of growth pattern in Guangdong foreign trade has achieved preliminary success in recent years, export market structure and market diversification have been optimized, and service trade has developed rapidly. The Blue Book in last year centers on export market diversification. Around the development of service trade, this year the Blue Book arrange the following three research subjects:

"Subject on Development of service trade in Guangdong" consists of 4 research reports, which focuses on the development of regional service trade in Guangdong. *The New Opportunities of Service Trade Development and the New Situations and New Ideas in Guangzhou* analyzes the international service transfer and trade trends bringing new opportunities to the service trade development in Guangzhou; this paper proposes new ideas for the service trade development on the consideration of its new situations and new problems, requiring to innovate management system and mechanism, to consolidate and promote the traditional advantage service trade, to develop the



knowledge-intensive and emerging service trade. *Evaluation and Direction Selection on developing for Service Trade in Shenzhen* evaluate service trade development in Shenzhen, pointing out its problems, putting forward the ideas and the directions, which is to make the structural reform and technological innovation as the driving force, to take the historic opportunity of the international service transfer, to optimize the industrial structure, and to establish a reasonable trade structure paying equal attention to both service trade and goods trade. *Development Status, Problems and Countermeasures of Service Outsourcing Industry in Guangdong* describes that there is a certain gap in international service outsourcing between Guangdong and Jiangsu, Beijing and other province, on the shortage of small scale, low industrial concentration, unobvious regional characteristic, the low-end in the value chain, proposing to effectively promote the development of service outsourcing industry on the aspects of industrial planning, development power, personnel training and business environment and so on. *A Study on the Mode of Science and Technology Service Outsourcing Base in Guangdong: From the perspective of Industrial Agglomeration* reveals the internal logic of science and technology service outsourcing base and explores its the conditions, the foundation and the existing problems, proposing to build and improve the industrial field and the mode of science and technology service outsourcing base. The above researches reveal that regional service trade in Guangdong has the main problems of the concentrated regional distribution and market structure. Take the 2011 data as an example. Guangdong service trade value was U. S. MYM 114.581 billion (including Shenzhen), highly centralizing on Guangzhou and Shenzhen, which accounted for 20.91% and 45.90% respectively; markets concentrated on Hong Kong, service trade value between Guangdong and Hong Kong amounted to U. S. MYM 39.45 billion, accounting for 44.6% in the total service trade value of Guangdong, fully embodying the characteristics of the "Front Shop, Back Factory" mode in Guangdong service trade. The scale of Guangdong service outsourcing is expanding on the view of format. In 2011, the execution of the Guangdong service outsourcing contract amounted to U. S. MYM 3.45 billion, an increase of 46.8%, in which offshore service outsourcing execution amounted to U. S. MYM 2.8 billion, an increase of 47.7%. In addition, the service outsourcing contract amount was U. S. MYM 5.39 billion, an increase of 60.2%, in which offshore service outsourcing contract amounted to U. S. MYM 3.76 billion, an increase of



48.5% , showing the potential for future growth.

“Subject on Opening to The Outside World and Cooperation in Guangdong” constitutes by 3 research reports and mainly discusses the openness of service industry and economic cooperation in Guangdong, elaborating the importance and basis of further opening-up, proposing opening ideas and development direction in major opening fields. *An Evaluation on Guangdong Producer Services Industry: the Importance of Opening to the Outside World* analyzes the developing status of the Guangdong producer services industry by the direct consumption coefficient, complete consumption coefficient, influential coefficient and induction coefficient, in views of economic relevance and industry association to clarify that the producer services industry lags behind and is still far from being able to meet the needs of the transformation of economic development in Guangdong, thus the opening to the outside world should accelerate. *Impact of Inward FDI in Producer Service Sector on Manufacturing: Based on Comparative Analysis of Commercial Circulation and Info-tech Service*, by utilizing panel data of 2004 and 2011 in Pecking, Shanghai and Guangzhou, this paper makes a comparative analysis of commercial circulation and information technology sector from the perspective of FDI knowledge spillovers in service industry, and finds that foreign entities are able to activate the local talent and technical know-how stocks, to strengthen market competition, and to generate positive externalities, giving that inward FDI in producer service drives the productivity of whole, local or foreign owned manufacturer. And based on the analysis, it proposes to support producer service, to strengthen opening policy of producer service, mainly is to accelerate the opening-up of commercial circulation. *New Thinking on Cooperation of Main Service Industry Spheres among Guangdong, Hongkong and Macau* reviews the process of deepening cooperation of service industry among Guangdong, Hong Kong and Macau based on CEPA, elaborating the status of main cooperation spheres including logistics industry cooperation, tourism industry cooperation, financial industry cooperation, professional services industry cooperation, information service industry cooperation, science and technology service industry cooperation, convention and exhibition industry cooperation, creative industry cooperation, putting forward the ideas and direction for the development of these key cooperation spheres.

“Subject on Service Trade Development and Trade Environment in China” is made up of 5 research reports, mainly on the view of China’s service trade to explore



the environment and situation of service trade development in Guangdong. *Effects of Institutional Environment on the Growth of China's Service Industry: A Cross Regions and Sub-industries Empirical Research Based on Extended solos Model* portrays China's institutional environment during the period of market reform, mainly described by the government-led distribution structure of economic resources, the development of non-state economies, the quality of intellectual property protection, the process of urbanization and the intensity of market competition in main service sub-industries, convincing the effects of institutional change on the growth of service industry in quantitative analysis. Empirical results show that, the growth of domestic service industries is significantly promoted by the development of non-state economies, urbanization process, high-quality intellectual property protection and sufficient market competition, meanwhile, which is obstructed by current resource allocation structure dominated by the government. *A Comparison of the Changing Comparative Advantages of Trade in Services among China, America and India* makes a comparison of the changing comparative advantages and structure in service trade among China, America and India, finding that China has a comparative advantage in labor-intensive service, America has a comparative advantage in human capital-intensive and physical capital-intensive service, and India only has a strong comparative advantage in computer and information service with relatively high human capital-intensity. And the conclusion implies that China should make great efforts to develop education and to accelerate the accumulation of human capital to optimize the structure of the service industry which plays an active role in improving the balance of service trade. *The Situation, Problems and Countermeasures of Culture Creative Products Exports in China* analyzes the export situation and problems of China's cultural creative products according to UNCTAD data, and put forward the corresponding countermeasures. *A Comparative Analysis of Cultural Trade Status and Competence between China and America* tells that China has advantages in traditional items in recent years through the comparison of scale, structure and competence between China and America; China cultural trade falls behind, its competence is extremely weak; the competence of modern cultural product and service is very weak. Based on the study, this essay suggests that we should fasten the development of cultural industries, improve the structure and competence of cultural trade etc. *A Comparative Analysis of trade in Creative Products between China and the Other Emerging Economies—In Aspect of Trade*



Complementarity and Competitiveness studies the conditions, the comparative advantages, the complementarity and competitiveness in creative goods trade between China and the emerging economies, finding that complementarity and competition exists between China and the main countries of ASEAN and other “BRICS”. So creative products market in the emerging economies should be further expanded and the creative industry cooperation between China and the other emerging economies should also be strengthened.

To sum up, the policies on speeding up the development of Guangdong service industry and service trade are gradually displaying achievements in recent years, the scale of Guangdong service trade has been expanding in rapid growth; service trade structure has been gradually optimizing. However, the imbalances of regional distribution, institutional environment of service industry and the opening degree to the outside world are still not conducive to China's foreign service trade and economic cooperation. We need to strengthen the service institutional innovation, to promote market-oriented reforms, to develop the private economy, and to improve the protection of intellectual property; to widen the opening to outside world, to take full advantage of the CEPA, to strengthen cooperation with Hong Kong and Macau in service industry; through the education development and human capital accumulation to improve the international competitiveness of service industry.