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主编：周振华 陈 维

协调发展

全面提升城市功能

An Economic Development Bluebook of Shanghai, 2005

Harmonious Development, Promotion of Urban Functions in All-Round Way

上海社会科学院出版社

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What are main characteristics of Shanghai economy in 2004? What would it be in 2005? Consisting of five parts, the paper tries to answer the two questions. The first part briefly introduces the general situation of the economy in the whole country. The second part points out characteristics of Shanghai economy in 2004. The third part analyzes the problems in Shanghai economy. The fourth part indicates various factors influencing Shanghai economy. The fifth part puts forward some suggestions to maintain a healthy and stable growth of the economy.

Special Report

Shanghai's Accelerated Participation into the Integration Proceeding of Yangtze River Delta	30
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To strengthen economic cooperation among regions and to promote regional integration have become vital stra-

tegic ways for enhancing China's comprehensive national power. Nevertheless, there are many obstacles that lead to contradiction even conflict among regions, this situation has thwarted the integration's effective practice. The paper analyzes the meaning and significance of Shanghai's participation into the integration proceeding of Yangtze River Delta, the paper also describes the situation and cause of contradiction, and studies the ways and strategies to speed up the integration.

**Potential, Orientation and Emphasis of Shanghai's
Development in Service Trade 55**

To construct Shanghai into a "World City" is a grand and hard cause, it has close connection with scale and standard of Shanghai's service industry, as an important part of which, service trade plays strategic role in globalization. To promote service trade is beneficial for Shanghai to enhance international competitiveness, to improve international trade environment, to speed up participation into global economic division and cooperation, to increase foreign exchange revenue and to expand employment. It's also vital foundation to improve industrial structure, build modern service industry system. Meanwhile, with China's entry into WTO and formal implement of framework of Shanghsi-Hongkong Economic Cooperation, Shanghai has been confronted with new demands as well as advantages in development of service trade.

**Promotion of the Interacted Development Between
Secondary Industry and Tertiary Industry 75**

In recent years, the academia in Shanghai discussed

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deeply around the issue of the new-round economic development and industrial structure adjustment and also put forward many new ways for sustainable development of Shanghai's industries. The paper expounds the amalgamation and interaction of secondary and tertiary industry, it also describes the *status quo* of Shanghai's industrial structure, finally proposes several suggestions to the orientation of the industrial structure's adjustment.

Individually-Run Enterprises: Toward the Crucial Role in Shanghai's Economy 98

Local government's ideological preference could decide the policy toward individually-run enterprises, then would influence the prospect of those enterprises. In China, state-owned enterprises, individually-run enterprises and foreign capital economy compete and complement each other, this situation leads to sustainable and independent creation of individually-run enterprises. Those governments that could get rid of the traditional ideological preference rapidly and completely could make individually-run enterprises to obtain the efficiency advantages in deals.

Promotion of Shanghai's "Producer Services" and "Consumer Services" in Interacted Development 120

Invisible service could be divided into two kinds: "producer services" (toward capital production); "consumer services" (toward consuming production). The paper analyzes the development and interior relation of the two kinds of services. As a result of the research, following points could be concluded: 1) The input ratio of "producer services" in tertiary industry is highest, the ratio in

secondary industry is lowest; 2) In different industry sector, the input ratio of every different kind of service is much different; 3) The growth of ratio has been dramatic in consuming expenditure of "consumer services", whose price index has also received considerable growth. From the points as above, we could believe that: 1) Besides the supply number, structure and quality, price is also vital for promoting the development of "producer services", it could directly influence the cost and efficiency of consumer; 2) The adjustment and optimization of structure of "producer services" could improve the industrial structure of the whole national economy; 3) To understand the difference of consumer services in different industry sector is beneficial for us to take measures to promote the structural adjustment, optimization and development of consumer services industry; 4) The relations between "producer services" and "consumer services" is reflection of relations between producing materials and consuming materials in service field. To understand this point could help us to promote the healthy and rapid development of service industry; 5) We should unswervingly develop the tertiary industry and fully play its self-enhancement ability.

Study on Interaction and Coordination of Employment

Structure and Industrial Upgrade 142

Employment and industrial structures influence and act each other. High-quality workforce plays vital role in economic development. Since the reform and opening up, the gap between the two structures in Shanghai has gradually diminished, but problems still exist. In present, optimization and upgrade of the two structures are urgently

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needed, which could promote the overall, harmonious and sustainable development of Shanghai's economy. The paper briefly explains the mechanism of the mutual coordination of the two structures, analyzes the evolution and *status quo* of them in Shanghai, finally the paper points out some suggestions to the interaction and coordination of the two structures.

Functional Coordination Between Non-Governmental Organizations and Governmental Departments

in Shanghai 176

Development of non-governmental organizations is an issue with significance and sensitivity that closely connects with harmonious development of China's political and material civilization. The prosperity of non-governmental organization absolutely demonstrates the progress and civilization of society from whether history of developed countries of from Shanghai's history. The paper puts emphasis on evaluation of three major non-governmental organizations in Shanghai: autonomous-governance organization in community; guild; commonweal and charity group. The paper considers that non-governmental organizations in Shanghai need both government's support, guide, supervision and public's active participation although Shanghai's non-governmental organizations have developed better than the average level of the whole nation this year.

Study on *Status Quo* and Strategy of Shanghai's Real Estate's Market Under the Background of Macro Control 201

Since the latter half year of 2003, the Communist Party Center and the State Council have unveiled a series

of policies of macro control and taken strict measures in real estate market, increasing the deposit-reserve ratio and project capital, rectifying fix-asset investment project. These measures have vital significance to improve the development of real estate's market in Shanghai. Whereas, would these measures bring out new risks although the bubble of real estate be extruded? Would price inflexion appear? What would be next step of central government's measures? These problems have been broadly cared by all circles. The paper tries to study on the interior regulation and major factors that influence the variation of real estate market of Shanghai, the paper also refers to *status quo* and characteristics of the market and strategy for sustainable development of the market.

Survey and Comparison Study

Comparison on Overall Competitiveness of Ten Domestic Cities and Trend of Shanghai's Overall Competitiveness 222

At the end of 2000, the Urban Overall Competitiveness Research Center of Shanghai Academy of Social Sciences set up a group of indexes to evaluate a city's competitiveness, they compared the competitiveness of ten domestic cities according to statistics of 1999 and 2000. The report aroused interests from all walks of the society, and inspired a wave of comparative study on Chinese cities in the academic field. With the progress of Chinese economy, overall competitiveness of cities in China has greatly improved and new features have arisen in the development of cities. We absorb new achievements in urban competitiveness study, and adjust former indexes. Based on adjusted indexes, we make a comparison on overall competi-

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tiveness of ten domestic cities according to statistics of 2003, and have review on characteristics in changes of those indexes since 1999.

Study On the Consumption and Investment of

Medium-Income Group in Shanghai 241

Based on the abundant investigative data, this paper discusses the *status quo* of general situation of consumption and investment in medium-income group in Shanghai, analyzes and studies their consumption structure, including consumption of housing, automobile, education and other daily expenditures, describes and estimates the consumption trend in future. Through the study of their investment both in monetary capital and human capital, brings forward some countermeasures to better consume and invest for Shanghai medium-income group.

Connotation and Exploration of International Policies of

Harmonious Development among Areas 271

Every country would counter the problem of area coordination in economic relations. To explore backward areas, to coordinate economic relations among areas and to avoid polarization have always been the essential goals in area economic development. The paper introduces international theories and practice in this field and points out their directive significance to our country.

总 报 告

2004 上海经济运行分析 及 2005 年展望

〔内容提要〕 2004 年上海经济运行有哪些特点？2005 年又会怎样？本文试图回答这两个问题。全文分五个部分。第一部分简要分析了 2004 年全国经济运行情况；第二部分分析了 2004 年上海经济的运行特点；第三部分分析了上海经济运行中存在的隐忧和问题；第四部分分析了影响 2005 年上海经济发展的各种因素；第五部分提出了保持上海经济持续稳定健康发展的一些建议。

一、2004 年全国经济运行情况

衡量一个国家的宏观经济运行状况，一般可以从经济增长、就业、物价上涨及国际收支平衡状况等四个方面考察。2004 年我国经济延续了 2002 年下半年以来的复苏扩张势头。1~6 月份经济增长速度达到了 9.7%，这个速度是 1996 年以来最高的。熟悉中国经济的人都知道，在以前的经济扩张期中，较快的经济增长速度往往伴随着较快的物价上涨。最明显的是 1992 到 1995 年，这 4

在写作本文的过程中，得到了很多专家学者的帮助指导，此外，也参阅和利用了一些参考文献，在此一并感谢！

年的经济增长速度分别是 9.2%、14.2%、13.5%、10.5%，但是物价上涨幅度也分别达到 6.4%、14.7%、24.1%、17.1%。从历史的比较中可以看出，2004 年经济增长速度与物价涨幅之间的关系是比较理想的。2004 年 1~8 月份，居民消费价格总水平同比上涨了 4.0%，这个幅度尽管比前几年高，但尚属温和。在经济进入扩张期，在经济增长速度达到 1996 年以来最高的情况下，物价上涨幅度有限，这是令人满意的。

就业方面。虽然就业形势依然严峻，但是有较大的改善。部分地区甚至出现农民工紧缺的现象。国际收支方面，2004 年 1~8 月出口同比增长 35.8%，进口同比增长 40.8%，经常项目下基本保持平衡。外商直接投资继续增加，1~8 月份，实际利用外资金额为 435.59 亿美元，同比增长 18.77%。外汇储备持续大幅增加，6 月底，我国外汇储备已经高达 4 703 亿美元，比去年年底增加 673 亿美元。

因此从经济增长、物价上涨、就业、国际收支平衡等四个方面以及它们之间的搭配关系来看，我们认为，2004 年我国的经济形势是多年来最好的。好的经济形势还表现在以下方面：农业生产向积极的方向发展，粮食价格有所上升，农民收入增加较快，农民种粮积极性明显提高；工业生产增长速度较快，工业企业利润继续大幅提高；财政收入大幅度提高；城市居民收入增长加快等等。形势向好是当前我国经济发展的主流和最基本的方面，对这一点必须有深刻的认识。

在经济向好的同时，也出现了经济局部过热的现象，主要表现在投资增长过快、信贷规模过度膨胀、基础原材料价格大幅上涨、煤电油运紧张等方面。针对这种情况，4 月份以后，国家陆续采取了一系列的市场、法律、行政措施，实施宏观调控。到 8 月份，已取得明显成效。8 月份，人民币贷款余额同比增长 14.1%，广义货币 M2 余额同比增长 13.6%，固定资产投资金额同比增长 30%，这些

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指标都回到了调控范围之内。另据发改委公布的数据,4月份到8月份全国共清理固定资产投资项目 70 600 个,涉及总投资 17.27 万亿元。由此可见,宏观调控确实取得了明显成效。

尽管如此,中国新一轮的经济增长周期依然面临经济结构不尽合理、经济增长方式过于粗放、潜在金融风险较大等问题。经济结构方面,一方面存在所有制结构、地区经济结构、城乡经济结构不合理等老问题,另一方面也出现了一些新的问题,比如,投资和消费的结构问题。2004 年上半年,中国的投资率达到改革开放以来的最高水平,而消费率降到了最低水平。投资率水平之高,已与亚洲金融危机爆发之前的一些亚洲国家非常相似。

经济增长方式方面。根据亚行的估计,每生产 1 000 美元的 GDP,中国使用的原油大约是亚洲其他国家平均水平的两倍,由此可见,我国经济增长方式粗放。粗放的经济增长方式带来的直接的后果就是中国的基础原材料、能源、交通的短缺。据报道,2003 年中国共进口原油 9 113 万吨,对外依存度为 35.0%,2004 年前 8 个月,我国石油进口量高达 7 600 万吨,对外依存度上升到 40%。预计 2004 年原油进口量为 1.2 亿吨,原油对外依存度将超过 40%。改革开放以来,中国能源消费翻一番支撑了 GDP 翻两番。到 2020 年,要再实现 GDP 翻两番,即便按能源再翻一番考虑,要保障能源供给,我国也有很大难度。尽管我国可以利用国外资源来弥补国内资源的短缺,但大量进口存在的市场和价格风险、运输能力的制约和进口安全保障等问题都难以回避。研究表明,如果转变经济增长方式,采取强化节能的措施,大幅度提高能源利用效率,到 2020 年中国万元 GDP 能耗可由 2002 年的 2.68 吨标准煤降为 1.54 吨标准煤,能源消费总量能控制在 30 亿吨标准煤之内,否则,就要消耗 40 多亿吨标准煤。

此外,我国潜在的金融风险也不能忽视。先看借贷比率。借贷比率(金融机构贷款/GDP)可以反映银行信贷扩张与经济增长